

Aerospace and Defense Wire Harness Market Size and Forecast (2021 - 2034), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Wire Harness Connector, Wire Harness Terminal, Wire, Others), Insulation Material (Polyvinyl Chloride (PVC), Cross-linked Polyethylene (XLPE), Polyethylene (PE), Polypropylene (PP), Polyurethane (PU), Thermoplastic Elastomer (TPE), Others), Aerospace & Defense Application (Avionics Wiring, Flight Control System, Cabin Management System, Radar System, Military Communication Systems, Others), Voltage Capacity (Low Voltage (0 to 50V), Medium Voltage (50 to 300V), High Voltage (More than 300V)), Conducting Material (Copper, Aluminium, Optical Fiber, Others), Sales Channel (OEMs, Aftermarket) and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)

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Abstracts

The Aerospace & defense wire harness market size was valued at US\$8.35 billion in 2025 and is expected to reach US\$12.68 billion by 2034; it is estimated to record a

CAGR of 4.7% from 2026 to 2034.

The Aerospace & defense wire harness market is segmented into five major regions—North America, Europe, Asia Pacific (APAC), the Middle East & Africa (MEA), and South & Central America. Asia Pacific dominated the market in 2025, followed by North America and Europe, respectively.

North America represents one of the most advanced and mature regions in the aerospace & defense wire harness market, driven by its strong presence of aircraft manufacturers, defense contractors, and space technology organizations. The region is anchored by major aerospace ecosystems in the US, where commercial aviation, military aviation, and space exploration programs create sustained demand for highly reliable and lightweight wire harness systems. Key industry participants such as Boeing, Lockheed Martin, and Northrop Grumman contribute to the need for advanced electrical interconnection systems used in avionics, flight control systems, radar, and mission-critical defense platforms. The growing complexity of next-generation aircraft and defense systems pushes the demand for more sophisticated, high-density, and thermally resilient wire harness designs. In March 2024, the US Department of Defense logistics programs continued steady procurement of aircraft wiring harnesses and electrical assemblies through Defense Logistics Agency (DLA) contracts. Boeing received multiple DLA Aviation awards for aircraft harness components and electrical assemblies, reinforcing ongoing fleet sustainment requirements across military platforms such as transport aircraft and fighters.

Continuous defense modernization programs, increasing adoption of unmanned aerial systems, and expansion of space exploration initiatives led by organizations such as NASA and private aerospace players such as SpaceX are accelerating innovation in wiring architectures. The shift toward more electric aircraft, improved fuel efficiency standards, and integration of advanced avionics systems are increasing wiring complexity and boosting replacement and upgrade cycles. Strict regulatory frameworks from aviation authorities also reinforce the need for high-quality, safety-compliant harness assemblies.

Transformer market future trend: Aircraft manufacturers and defense system integrators are under pressure to reduce overall platform weight, improve fuel efficiency, extend operational range, and accommodate growing electrical and electronic content. As a result, the industry is transitioning from conventional wiring solutions to lightweight harness materials, including thin-wall fluoropolymer-insulated wires, cross-linked ETFE-based cables, aluminum conductors in selected applications, lightweight shielding

braids, and compact composite interconnect components.

The trend is evident in next-generation commercial aircraft, military aircraft, unmanned aerial vehicles (UAVs), and space platforms, where every kilogram saved can contribute to improved performance and lower operating costs. TE Connectivity, a major aerospace interconnect supplier, highlights that its Raychem SPEC 55 wire family utilizes advanced insulation materials that enable smaller and lighter wiring systems while maintaining resistance to extreme temperatures, abrasion, and aerospace fluids. The company also notes that some SPEC 55 configurations can achieve weight reductions of up to 30% compared with traditional aerospace wiring solutions. TE Connectivity's Raychem INSTALITE lightweight braid system has been developed to provide electromagnetic interference protection while delivering up to 50% weight savings compared with conventional copper braids.

There is a growing use of cross-linked ETFE insulation and lightweight cable architectures in modern aircraft electrical wiring interconnection systems (EWIS). Industry technical guidance indicates that ETFE-based materials offer a combination of low weight, mechanical durability, and chemical resistance, making them suitable for next-generation aerospace applications. Aerospace suppliers are introducing smaller connectors, thin-wall cables, and single-pair data transmission technologies that reduce wire count and harness mass without compromising performance. As aircraft electrification, advanced avionics, and defense modernization programs expand, demand for lightweight wire harness materials is expected to remain a significant technology and procurement focus across the aerospace and defense sectors.

Safran SA; Latecoere SA; GKN Aerospace Services Ltd; Collins Aerospace; Prysmian SpA; AMETEK, Inc.; Interconnect Solutions Company LLC; Amphenol Corporation; HarcoSemco LLC; Axon Cable SAS are among the key players profiled during this market study. Several other essential market players were also studied and analyzed to get a holistic view of the global Aerospace & defense wire harness market and its ecosystem.

The overall Aerospace & defense wire harness market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Aerospace & defense wire harness market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts

such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders specializing in the Aerospace & defense wire harness market.

Saves and reduces time required for identifying the market growth, size, leading players, and segments in the global Aerospace and Defense Wire Harness market.

Highlights key business priorities to assist companies in realigning their business strategies

Emphasizes key findings and recommendations that uncover emerging industry trends in the global Aerospace and Defense Wire Harness market, enabling stakeholders across the value chain to craft effective long-term strategies

Develop/modify business expansion plans by analyzing substantial growth prospects in mature and emerging markets

Scrutinizes in-depth global Aerospace and Defense Wire Harness market trends, along with factors driving the market, as well as those hindering it

Enhances the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution

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