

Europe Wire-to-Board EV Connectors Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe Wire-to-Board EV Connectors Market is projected to grow significantly, reaching an estimated US\$ 1,304.7 million by 2031, up from US\$ 286.4 million in 2024. This growth represents a remarkable compound annual growth rate (CAGR) of 24.4% from 2025 to 2031.

Executive Summary and Market Analysis

The wire-to-board EV connectors market in Europe is experiencing robust growth, driven by the region's rich automotive heritage, ambitious climate goals, and swift electrification initiatives. Key countries such as Germany, France, the UK, Italy, and Spain are leading the charge towards electric mobility, resulting in a heightened demand for sophisticated internal EV components, particularly wire-to-board connectors. These connectors are essential for various applications, including powertrain electronics, advanced driver-assistance systems (ADAS), infotainment systems, and battery management units.

According to the European Automobile Manufacturers Association (ACEA), battery electric vehicles (BEVs) represented 15% of new vehicle registrations in January 2025, a notable increase from 10.9% in the same month the previous year. Hybrid electric vehicles (HEVs) maintained a leading market share of 34.9%, indicating a growing consumer preference for electrified vehicle platforms. Countries like Germany (+53.5%), Belgium (+37.2%), and the Netherlands (+28.2%) have reported substantial growth in BEV registrations, highlighting the increasing need for internal connectivity solutions as vehicle electronics become more intricate.

Strategic Insights

Market Segmentation Analysis

The Europe Wire-to-Board EV Connectors Market can be segmented based on several criteria:

By Type: The market is divided into Sealed Connector Systems and Unsealed Connector Systems, with the Sealed Connector System segment leading the market in 2024.

By Application: Applications include ADAS and Safety Systems, Body Control and Interiors, Infotainment Systems, Engine Management and Powertrain, Battery Management Systems, Vehicle Lighting, and Others. The ADAS and Safety System segment was the largest in 2024.

By Propulsion Type: The market is categorized into Battery Electric Vehicles, Plug-In Hybrid Vehicles, Fuel Cell Electric Vehicles, and Hybrid Electric Vehicles, with Battery Electric Vehicles dominating in 2024.

By Voltage: The segments include Low Voltage, Medium Voltage, and High Voltage, with High Voltage connectors leading the market in 2024.

Market Outlook

The rapid advancement of electric vehicles (EVs) is characterized by the increasing integration of sophisticated electronic and infotainment systems that necessitate reliable, high-speed connections between wiring harnesses and printed circuit boards (PCBs). Wire-to-board EV connectors are vital for linking these components, ensuring efficient power delivery and signal transmission within the vehicle's complex electronic architecture. Modern infotainment systems, which feature high-resolution displays, navigation, connectivity, and advanced audio capabilities, rely on stable, low-loss connections provided by advanced wire-to-board connectors.

The industry's emphasis on integrating advanced driver assistance systems (ADAS), autonomous driving technologies, and telematics underscores the necessity for reliable electrical interfaces. These systems depend on real-time data transfer between sensors, cameras, control units, and electronic modules distributed throughout the vehicle. Wire-to-board connectors facilitate this communication by offering secure,

vibration-resistant connections that can endure harsh automotive conditions, including temperature variations and electromagnetic interference.

Recent collaborations, such as the one between Nvidia Corp and MediaTek Inc. to develop AI-powered vehicle infotainment systems, highlight the increasing complexity and wiring density within EVs. Similarly, Garmin's Unified Cabin domain controller, which received a CES 2025 Innovation Award, enhances the in-vehicle experience through AI-driven customization and centralized control on the Android Automotive Operating System. These innovations further drive the demand for compact, durable, and high-performance wire-to-board connectors.

As automakers continue to enhance in-vehicle connectivity and digital experiences, the demand for advanced wire-to-board EV connectors is expected to rise, supporting the seamless integration of sophisticated electronic systems and ensuring optimal performance across modern electric vehicles.

Country Insights

The Europe Wire-to-Board EV Connectors Market is also analyzed by country, including Germany, the United Kingdom, France, Italy, Russia, and the Rest of Europe. Germany is the largest market player as of 2024.

Germany is a pivotal force in the European EV landscape, bolstered by substantial government support and aggressive electrification targets. Between 2019 and 2022, EV registrations in Germany skyrocketed from 3% to 31.4% of total new car registrations, thanks to incentives like purchase subsidies, tax exemptions, and infrastructure investments. By 2023, Germany had approximately 2.3 million EVs on the road, comprising 1.4 million BEVs and 900,000 PHEVs, supported by 116,000 public charging points, marking a 30% increase year-over-year.

This growth not only fuels the demand for external EV connectors but also amplifies the need for wire-to-board connectors within vehicles. These compact, high-performance interconnects are crucial for internal EV systems such as battery management, power electronics, thermal control, and ADAS, which must function with precision and durability under high data and power loads.

Company Profiles

Key players in the Europe Wire-to-Board EV Connectors Market include Yazaki Corp,

Sumitomo Electric Industries Ltd, Molex LLC, TE Connectivity Ltd, PHOENIX CONTACT GmbH & Co. KG, Aptiv Plc, Hirose Electric Co Ltd, Amphenol Corporation, KYOCERA Corporation, and Guchen Electronics. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to deliver innovative products and enhance their market presence.

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