

North America Commercial Vehicle Wiring Harness Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Vehicle Type (Electric Vehicle, Automotive, Light Commercial Vehicle, and Medium and Heavy Commercial Vehicle), Light Commercial Vehicle (SUV, Pickups, Minitrucks, and Minivans), and Medium and Heavy Commercial Vehicle (Medium and Heavy Trucks, Heavy Mining Trucks, Heavy Construction Vehicle, Heavy Agriculture Vehicle, and Medium Agriculture Vehicle/Tractor)

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Abstracts

The North America commercial vehicle wiring harness market is projected to grow significantly, reaching an estimated US\$ 7,416.93 million by 2031, up from US\$ 3,969.70 million in 2023. This growth represents a compound annual growth rate (CAGR) of 8.1% from 2023 to 2031.

Executive Summary and Market Analysis

The North American market, which includes the United States, Canada, and Mexico, plays a crucial role in the global commercial vehicle wiring harness sector. This region is witnessing a substantial increase in the production of commercial vehicles, which is a primary driver for the wiring harness market. The rising demand for commercial vehicles among businesses is propelling market growth, as wiring harnesses are essential components in various types of commercial vehicles, including trucks, buses, and vans.

Manufacturers of commercial vehicles are ramping up production to meet the growing customer demand. According to the Association des Constructeurs Européens d'Automobiles (ACEA), approximately 16.7 million trucks, buses, and vans were produced globally in May 2023, with North America accounting for 26.8% of this production. The increase in commercial vehicle production directly correlates with the demand for wiring harnesses, which are critical for enhancing vehicle performance, especially in challenging environments.

Strategic Insights

Market Segmentation Analysis

The North America commercial vehicle wiring harness market can be segmented based on vehicle type. The key segments include electric vehicles, automotive vehicles, light commercial vehicles, and medium and heavy commercial vehicles. In 2023, the automotive segment dominated the market share.

The light commercial vehicle segment is further divided into subcategories such as SUVs, pickups, minitrucks, and minivans. Meanwhile, the medium and heavy commercial vehicle segment includes medium and heavy trucks, heavy mining trucks, heavy construction vehicles, and agricultural vehicles. This segmentation highlights the diverse applications of wiring harnesses across various vehicle types, underscoring their importance in the commercial vehicle sector.

Market Outlook

The emergence of smart wiring harness systems is transforming the landscape of the commercial vehicle wiring harness market. These systems are designed for a wide array of vehicles, including military, mining, public transport, and industrial equipment. Smart wiring harnesses are compact, easy to install, and maintain, offering significant advantages over traditional systems.

One of the key benefits of smart wiring harnesses is their built-in diagnostic capabilities, which allow for design changes and maintenance without the need for complex fuse boxes or timer relays, resulting in a lighter system. Additionally, the electronic fuses integrated into these harnesses can be reset, enhancing their functionality. Smart wiring harnesses also facilitate easier installation, maintenance, and expansion, with standardized components that can be customized for various vehicle body control

functions. This compatibility across different vehicle types, along with real-time fault reporting, significantly improves safety and operational efficiency.

The ability of smart wiring harnesses to monitor the health and performance of vehicle components, while also enabling diagnostics and preventative maintenance, is expected to drive their demand in the coming years. This trend will further contribute to the growth of the commercial vehicle wiring harness market.

Country Insights

The North America commercial vehicle wiring harness market is primarily composed of three countries: the United States, Canada, and Mexico. Among these, the United States holds the largest market share as of 2023.

The US is a leader in the production and sales of commercial vehicles, including trucks and trailers. Data from the International Organization of Motor Vehicle Manufacturers indicates that in 2022, the US produced a total of 1,751,736 vehicles, with 8,308,603 of those being commercial vehicles. Major manufacturers in the US include Volvo Trucks USA, Isuzu Commercial Truck of America, and Ford Motor Company, among others. The market is also witnessing new entrants, such as Toyota, which announced the launch of a Class 8 Tern 100% battery-electric pickup truck in June 2024.

As wiring harnesses are integral to connecting all electrical and electronic components in commercial vehicles—such as sensors, electronic control units, batteries, and actuators—the robust growth of the commercial vehicle sector in the US is a significant driver for the demand for wiring harnesses.

Company Profiles

Key players in the North America commercial vehicle wiring harness market include Motherson Sumi Systems Ltd, AME Systems (VIC) Pty Ltd, Spark Minda, Yazaki Corp, Sumitomo Electric Industries Ltd, Nexans SA, Furukawa Electric Co Ltd, Lear Corp, DR?XLMAIER Group, and ECO CABLES, among others. These companies are actively pursuing strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase their market presence.

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