

**Automotive Wiring Harness Market by Application (Engine, Chassis, Cabin, Body & Lighting, HVAC, Battery, Dashboard/Cabin, Seat, Sunroof, Door), ICE & EV Transmission Type, Data Rate, Component Material & Region - Global Forecast to 2030**

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**Report description:**

The global automotive wiring harness market is projected to grow from USD 48.7 billion in 2023 to USD 59.5 billion by 2030, at a CAGR of 2.9% during the forecast period. The global demand for automobiles continues to rise, as does the need for automotive wiring harnesses. The global market for EVs has also increased in recent years as countries have set their EV targets. EVs have complex electrical systems compared to traditional ICE vehicles. They require specialized wiring harnesses to accommodate components such as battery packs, electric motors, and advanced charging systems, which require high voltage wiring harnesses. The growing demand for EVs and ADAS features would boost the technological advancements in the wiring harness.

"Due to increased demand for speed, efficiency in data transmission and electrical connections, optical fiber segment is estimated to be the fastest growing market."

The growing demand for high-speed data transmission from vehicle manufacturers drives the market for optical fiber cables in vehicles. Optical fibers are known for their reliability and safety and are much lighter and thinner than traditional copper wiring. Optic fiber wires can also help reduce weight, thereby improving fuel efficiency. Modern vehicles are also becoming more sophisticated and equipped with advanced electronic systems to enhance safety, convenience, and connectivity. These systems include ADAS, which relies on various sensors and cameras, and infotainment systems, which provide entertainment, navigation, and communication features. The demand for such advanced electronic systems necessitates a robust and high-speed data transmission infrastructure, which optical fibers can provide.

Fiber optic cables offer significant bandwidth for signal transmission, surpassing copper cables of similar diameter. Traditional wire harnesses tend to become heavier when handling high-speed, large-capacity communication due to the need for thicker wires. On

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the other hand, optical fibers, crafted from lightweight materials such as glass and plastic, offer a solution that achieves high-speed, large-capacity communication and reduced weight. Moreover, optical signals demonstrate remarkable noise resistance compared to electrical signals. This innovation results in more efficient and lightweight communication systems. Sumitomo Electric Industries, Ltd. is expediting the development of an optical harness designed for the automotive industry. Anticipated to be available for commercial use in 2026, this innovative product is set to significantly advance the world of connected vehicles and the growing trends encapsulated by CASE (Connected, Autonomous, Shared, and Electric mobility).

"Wires segment in automotive wiring harness market is estimated to be the largest market during the forecast period."

Wires are indispensable components within automotive wiring harnesses, facilitating power flow and data throughout the vehicle. Automotive wiring harnesses consist of various bundled wires, and each wire is responsible for carrying electrical signals and energy used in the smooth functioning of various automobile subsystems, such as starting the engine, lights, meters, navigation systems, and power windows and doors. A wire has a fixed amount of resistance per foot. This means the longer the wire, the larger the resistance. If the resistance of the wire is too high, much of the power that flows down the wire will be wasted. There is a loss of energy as heat builds up in the wire. Vehicles are becoming increasingly complex, with more and more electronic components. This requires more wires to connect all the components and systems. Due to the need to connect the battery pack, motor controller, and other electronic components, EVs have more wires than traditional gasoline-powered vehicles. Automotive manufacturers are constantly looking for ways to reduce the weight of their vehicles, and wires are a significant component of vehicles. As a result, there is a growing demand for lightweight and durable wires that can withstand the harsh conditions of the automotive environment.

Asia Pacific is projected to be the fastest-growing regional market.

For the market analysis, the Asia Pacific region includes China, India, Japan, Thailand, South Korea, and the Rest of Asia Pacific. China is considered the manufacturing hub for the automotive industry. According to the MarketsandMarkets, China and India produce 26-29 million economy passenger cars yearly. With an increase in the production of vehicles, the demand for automotive wiring harnesses is expected to increase. India is projected to be the fastest-growing market. The steady rise in disposable incomes among Indian consumers has increased demand for various consumer goods, including automobiles. Mandatory safety feature mandates, including Automatic Emergency Braking (AEB), Lane Departure Warning (LDW), and Speed Assistance Systems (SAS), in the Asia Pacific region are driving the demand for advanced automotive wiring harnesses. These regulations, along with requirements for additional safety features like Daytime Running Lights (DRLs) and Electronic Stability Control (ESC), significantly impact the market, emphasizing the need for sophisticated wiring solutions to support enhanced vehicle safety and performance. The Asia Pacific region has experienced increased demand for luxury vehicles in the past few years. The luxury/premium segment vehicles have advanced body electronic functions that require additional automotive wiring harnesses for proper functioning. In the Asia-Pacific region, electric vehicles (EVs) have gained substantial traction, primarily led by China, which recorded 6.1 million EV sales in 2022, with notable adoption in South Korea and Japan. This transition towards EVs, driven by the resolve to address these challenges, is poised to impact the automotive wiring harness market significantly. EVs demand intricate and specialized wiring solutions to facilitate their advanced electric systems and functionalities.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.

-□By Company Type: Automotive wiring harness OEM - 80% and End-user organization- 20%

-□By Designation: C Level - 30%, Directors- 50%, and Others - 20%

-□By Region: Asia Pacific - 60%, Europe - 20%, North America -20%

The key players in the automotive wiring harness market are Yazaki Corporation (Japan), Sumitomo Electric Industries (Japan), Aptiv PLC (Ireland), Furukawa Electric (Japan), and Leoni AG (Germany). Major companies' key strategies to maintain their position in the global automotive wiring harness market are strong global networking, mergers and acquisitions, partnerships, and technological advancement.

#### Research Coverage

The study segments the automotive wiring harness market. It forecasts the market size based on application (engine harness, chassis wiring harness, body & lighting harness, HVAC harness, dashboard/ cabin harness, battery harness, seat harness, sunroof harness, traction harness and door harness)], component (connectors, terminals, wires, and others), material type (metallic and

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optical fiber), transmission type (electrical wiring and data transmission), data transmission harness market by data transfer rate (<150 Mbps and 150 Mbps to 1 Gbps), High voltage by application (battery and battery management system, motor management system) and region (Asia Pacific, North America, Europe, and the Rest of the World [RoW]).

The study also includes an in-depth competitive analysis of the major automotive wiring harness manufacturers, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

#### Key Benefits of Buying the Report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall automotive wiring harness market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Growing vehicle production and demand for advanced features, vehicle production of conventional vs. premium vehicles, rise in advanced features in vehicles, growing penetration of electric vehicles), restraints (Limited data transfer rate), opportunities (Growing trend of autonomous and semiautonomous vehicles, increasing demand for lightweight and fuel-efficient vehicles, increase in the use of high voltage wiring harness and optical fiber cable, increase in the use of wiring harness), and challenges (fluctuating copper costs due to increasing demand, challenges in wire preparation, staging and crimping) influencing the growth of the automotive wiring harness market.
- Product Development/Innovation: Detailed insights on upcoming technologies and new product & service launches in the automotive wiring harness market.
- Market Development: Comprehensive market information - the report analyses the authentication and brand protection market across varied regions.
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive wiring harness market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Yazaki Corporation (Japan), Sumitomo Electric Industries (Japan), Aptiv PLC (Ireland), Furukawa Electric (Japan), and Leoni AG (Germany) among others in automotive wiring harness market.

#### Table of Contents:

1□INTRODUCTION□	49
1.1□STUDY OBJECTIVES□	49
1.2□MARKET DEFINITION□	50
1.2.1□INCLUSIONS AND EXCLUSIONS□	50
1.3□MARKET SCOPE□	51
1.3.1□AUTOMOTIVE WIRING HARNESS MARKET SEGMENTATION□	51
1.3.2□REGIONS COVERED□	52
1.3.3□YEARS CONSIDERED□	52
1.4□CURRENCY CONSIDERED□	52
1.5□SUMMARY OF CHANGES□	53
1.6□STAKEHOLDERS□	53
2□RESEARCH METHODOLOGY□	54
2.1□RESEARCH DATA□	54
FIGURE 1□AUTOMOTIVE WIRING HARNESS MARKET: RESEARCH DESIGN□	55
FIGURE 2□RESEARCH METHODOLOGY MODEL□	56
2.1.1□SECONDARY DATA□	56
2.1.1.1□List of key secondary sources to estimate vehicle production□	57
2.1.1.2□List of key secondary sources to estimate market size□	57

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2.1.1.3	Key data from secondary sources	58
2.1.2	PRIMARY DATA	58
FIGURE 3	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	59
2.1.2.1	List of primary participants	59
2.2	MARKET ESTIMATION METHODOLOGY	60
FIGURE 4	RESEARCH METHODOLOGY: HYPOTHESIS BUILDING	60
2.2.1	BOTTOM-UP APPROACH	61
FIGURE 5	AUTOMOTIVE WIRING HARNESS MARKET SIZE: BOTTOM-UP APPROACH (APPLICATION AND REGION)	61
2.2.2	TOP-DOWN APPROACH	61
FIGURE 6	AUTOMOTIVE WIRING HARNESS MARKET SIZE: TOP-DOWN APPROACH (ICE VEHICLE, BY TRANSMISSION TYPE)	61
2.3	RESEARCH DESIGN AND METHODOLOGY	62
FIGURE 7	AUTOMOTIVE WIRING HARNESS MARKET: RESEARCH DESIGN & METHODOLOGY	62
FIGURE 8	AUTOMOTIVE WIRING HARNESS MARKET: RESEARCH METHODOLOGY ILLUSTRATION OF SUMITOMO ELECTRIC INDUSTRIES' REVENUE ESTIMATION	62
2.3.1	FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES	63
2.4	DATA TRIANGULATION	64
FIGURE 9	DATA TRIANGULATION METHODOLOGY	64
2.5	FACTOR ANALYSIS	65
2.6	RECESSION IMPACT ANALYSIS	65
2.7	RESEARCH ASSUMPTIONS	66
TABLE 1	RESEARCH ASSUMPTIONS	66
2.8	RESEARCH LIMITATIONS	67
3	EXECUTIVE SUMMARY	68
3.1	REPORT SUMMARY	68
FIGURE 10	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE, 2023 VS. 2030	68
4	PREMIUM INSIGHTS	70
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE WIRING HARNESS MARKET	70
FIGURE 11	GROWING VEHICLE PRODUCTION AND DEMAND FOR ADVANCED FEATURES IN VEHICLES TO DRIVE MARKET	70
4.2	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE	70
FIGURE 12	PASSENGER CAR SEGMENT TO LEAD ICE WIRING HARNESS MARKET DURING FORECAST PERIOD	70
4.3	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION	71
FIGURE 13	SUNROOF WIRING HARNESS TO SHOWCASE FASTEST GROWTH DUE TO INCREASING USE IN PREMIUM AND SUV VEHICLES DURING FORECAST PERIOD	71
4.4	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY TRANSMISSION TYPE	71
FIGURE 14	ELECTRICAL WIRING SEGMENT TO DOMINATE ICE VEHICLE WIRING HARNESS MARKET DURING FORECAST PERIOD	71
4.5	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TRANSMISSION TYPE	72
FIGURE 15	ELECTRICAL WIRING SEGMENT TO DOMINATE EV WIRING HARNESS MARKET DURING FORECAST PERIOD	72
4.6	AUTOMOTIVE WIRING HARNESS MARKET, BY ELECTRIC VEHICLE TYPE	72
FIGURE 16	BATTERY ELECTRIC VEHICLE (BEV) SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	72
4.7	AUTOMOTIVE WIRING HARNESS MARKET, BY COMPONENT	73
FIGURE 17	WIRES COMPONENT SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	73
4.8	AUTOMOTIVE WIRING HARNESS MARKET, BY MATERIAL	73
FIGURE 18	METALLIC WIRING SEGMENT TO COMMAND LARGER MARKET SHARE DURING FORECAST PERIOD	73
4.9	DATA TRANSMISSION HARNESS MARKET, BY DATA RATE	74
FIGURE 19	<150 MBPS SEGMENT TO MAINTAIN TOP POSITION DURING FORECAST PERIOD	74
4.10	HIGH VOLTAGE WIRING HARNESS MARKET, BY APPLICATION	74
FIGURE 20	BATTERY & BATTERY MANAGEMENT SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD	74

4.11	AUTOMOTIVE WIRING HARNESS MARKET, BY REGION	75
FIGURE 21	ASIA PACIFIC TO ACCOUNT FOR LARGEST SHARE OF AUTOMOTIVE WIRING HARNESS MARKET IN 2023	75
5	MARKET OVERVIEW	76
5.1	INTRODUCTION	76
5.2	MARKET DYNAMICS	77
FIGURE 22	AUTOMOTIVE WIRING HARNESS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	77
5.2.1	DRIVERS	77
5.2.1.1	Growth of automotive sector	77
FIGURE 23	GLOBAL SALES OF NEW VEHICLES, 2019-2023 (MILLION UNITS)	78
5.2.1.2	Growing production of premium vehicles	78
FIGURE 24	PENETRATION OF PREMIUM VEHICLES IN OVERALL PRODUCTION, 2019-2026	79
5.2.1.3	Rise in advanced features in vehicles	79
TABLE 2	GROWTH RATE OF AUTOMOTIVE SAFETY FEATURE APPLICATIONS, 2017-2025 (%)	80
5.2.1.4	Growing penetration of electric vehicles	81
TABLE 3	GROWTH RATE OF LOW- AND HIGH-VOLTAGE WIRING HARNESS, 2020-2030 (%)	82
FIGURE 25	GLOBAL BEV SALES, 2018-2022 (THOUSAND UNITS)	82
5.2.2	RESTRAINTS	83
5.2.2.1	Limited data transfer rate	83
5.2.3	OPPORTUNITIES	84
5.2.3.1	Growing trend of autonomous and semi-autonomous vehicles	84
TABLE 4	LEVELS OF AUTONOMOUS VEHICLES	84
5.2.3.2	Increasing demand for lightweight harnesses	85
TABLE 5	TECHNOLOGY IN USE TO REDUCE NUMBER OF WIRES	86
5.2.3.3	Increase in use of high-voltage wiring harnesses and optical fiber cables	87
TABLE 6	POWER CAPACITIES FOR VEHICLE TYPES	87
5.2.3.4	Increase in use of aluminum wiring harnesses	88
5.2.4	CHALLENGES	88
5.2.4.1	Fluctuating copper costs due to increasing demand	88
FIGURE 26	INCREASED AVERAGE COPPER WEIGHT PER VEHICLE, BY REGION, 2016 VS. 2019 (KG)	89
FIGURE 27	FLUCTUATING COPPER COSTS, 2019-2023 (USD/METRIC TONNE)	90
5.2.4.2	Issues related to wire preparation, staging, and crimping	90
5.3	TRADE ANALYSIS	91
5.3.1	IMPORT SCENARIO	91
5.3.1.1	US	91
TABLE 7	US: IMPORT SHARE, BY COUNTRY (VALUE %)	91
5.3.1.2	France	91
TABLE 8	FRANCE: IMPORT SHARE, BY COUNTRY (VALUE %)	91
5.3.1.3	Germany	91
TABLE 9	GERMANY: IMPORT SHARE, BY COUNTRY (VALUE %)	91
5.3.1.4	Mexico	92
TABLE 10	MEXICO: IMPORT SHARE, BY COUNTRY (VALUE %)	92
5.3.1.5	Belgium	92
TABLE 11	BELGIUM: IMPORT SHARE, BY COUNTRY (VALUE %)	92
5.3.2	EXPORT SCENARIO	92
5.3.2.1	US	92
TABLE 12	US: EXPORT SHARE, BY COUNTRY (VALUE %)	92
5.3.2.2	France	93

TABLE 13	FRANCE: EXPORT SHARE, BY COUNTRY (VALUE %)	93
5.3.2.3	Germany	93
TABLE 14	GERMANY: EXPORT SHARE, BY COUNTRY (VALUE %)	93
5.3.2.4	Mexico	93
TABLE 15	MEXICO: EXPORT SHARE, BY COUNTRY (VALUE %)	93
5.3.2.5	Belgium	94
TABLE 16	BELGIUM: EXPORT SHARE, BY COUNTRY (VALUE %)	94
5.4	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	94
FIGURE 28	REVENUE SHIFT FOR AUTOMOTIVE WIRING HARNESS MARKET	94
5.5	CASE STUDY ANALYSIS	94
5.5.1	CASE STUDY 1: COMPLEXITY IN BASIC CARS SUCH AS SEAT ATECA SUV SOLVED USING 2.2 KM WIRE, 100 SENSORS, AND CONTROL UNITS	94
5.5.2	CASE STUDY 2: DEVELOPMENT OF FLEXIBLE PRINTED CIRCUIT BOARDS BY TRACKWISE TO REDUCE WIRING HARNESS WEIGHT	95
5.5.3	CASE STUDY 3: RETROFITTING OF WIRE HARNESS BY MUELLER ELECTRIC	95
5.5.4	CASE STUDY 4: RELIABILITY OF VEHICLE-MOUNTED WIRING HARNESS CONNECTORS	95
5.5.5	CASE STUDY 5: CURRENT DEVELOPMENT OF WIRING HARNESSES	96
5.5.6	CASE STUDY 6: DEVELOPMENT OF NEW OPTICAL FIBER CABLE WITH MUCH HIGHER TRANSMISSION CAPACITY	96
5.5.7	CASE STUDY 7: USE OF ALUMINUM WIRE HARNESSES	97
5.5.8	CASE STUDY 8: SUMITOMO'S SHIFT FROM COPPER TO ALUMINUM	97
5.6	PATENT ANALYSIS	98
TABLE 17	PATENT ANALYSIS	98
5.7	SUPPLY CHAIN ANALYSIS	104
FIGURE 29	AUTOMOTIVE WIRING HARNESS MARKET: SUPPLY CHAIN ANALYSIS	104
5.8	ECOSYSTEM ANALYSIS	104
TABLE 18	AUTOMOTIVE WIRING HARNESS MARKET: ROLE OF COMPANIES IN ECOSYSTEM	104
FIGURE 30	AUTOMOTIVE WIRING HARNESS MARKET: ECOSYSTEM ANALYSIS	106
5.9	PRICING ANALYSIS	106
5.9.1	AVERAGE SELLING PRICE TREND, BY REGION	106
TABLE 19	LIGHT-DUTY VEHICLES: AVERAGE REGIONAL PRICE TREND OF AUTOMOTIVE WIRING HARNESS (USD)	106
TABLE 20	HEAVY-DUTY VEHICLES: AVERAGE REGIONAL PRICE TREND OF AUTOMOTIVE WIRING HARNESS (USD)	107
5.10	TARIFF AND REGULATORY LANDSCAPE	107
5.10.1	AUTOMOTIVE WIRING HARNESS STANDARDS	107
5.10.2	GERMAN STANDARD CAR WIRE PRODUCT CATALOG	108
5.10.3	JAPANESE STANDARD CAR WIRE PRODUCT CATALOG	109
5.10.4	AMERICAN STANDARD CAR WIRE PRODUCT CATALOG	109
5.11	TECHNOLOGY TRENDS	110
5.11.1	OPTICAL FIBER CABLES IN AUTOMOTIVE WIRING HARNESS	110
5.11.2	REDUCTION OF WEIGHT IN WIRING HARNESS	111
5.12	KEY CONFERENCES AND EVENTS IN 2023-2024	111
TABLE 21	AUTOMOTIVE WIRING HARNESS MARKET: KEY CONFERENCES AND EVENTS	111
5.13	KEY STAKEHOLDERS AND BUYING CRITERIA	112
TABLE 22	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR AUTOMOTIVE WIRING HARNESS	112
5.13.1	BUYING CRITERIA	112
FIGURE 31	KEY BUYING CRITERIA FOR AUTOMOTIVE WIRING HARNESSES	112
TABLE 23	KEY BUYING CRITERIA FOR WIRING HARNESSES USED IN VARIOUS VEHICLE TYPES	113
5.14	WHO SUPPLIES WHOM	113

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TABLE 24	AUTOMOTIVE WIRING HARNESS MANUFACTURERS TO AUTOMOTIVE OEMS	113
6	AUTOMOTIVE WIRING HARNESS MARKET, BY CATEGORY	115
6.1	INTRODUCTION	115
6.2	GENERAL WIRES	115
6.3	HEAT-RESISTANT WIRES	115
6.4	SHIELDED WIRES	116
6.5	TUBED WIRES	117
TABLE 25	WIRES AND CABLES FOR WIRING HARNESSES	117
7	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION	119
7.1	INTRODUCTION	120
7.1.1	INDUSTRY INSIGHTS	120
7.2	NUMBER OF HARNESSES IN EACH APPLICATION	120
TABLE 26	NUMBER OF HARNESSES, BY APPLICATION (GLOBAL AVERAGE)	120
7.3	OPERATIONAL DATA	121
FIGURE 32	AUTOMOTIVE WIRING HARNESS ARCHITECTURE	121
FIGURE 33	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023 VS. 2030 (USD MILLION)	121
TABLE 27	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (UNITS)	122
TABLE 28	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (UNITS)	122
TABLE 29	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (USD MILLION)	123
TABLE 30	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (USD MILLION)	123
7.4	ENGINE HARNESS	124
7.4.1	REQUIREMENT OF SAFETY FEATURES AS PER GOVERNMENT MANDATES TO DRIVE MARKET	124
TABLE 31	ENGINE HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	124
TABLE 32	ENGINE HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	124
TABLE 33	ENGINE HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	125
TABLE 34	ENGINE HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	125
7.5	CHASSIS HARNESS	125
7.5.1	INCREASING NUMBER OF COMMERCIAL VEHICLES IN EMERGING ECONOMIES TO DRIVE MARKET	125
TABLE 35	CHASSIS HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	126
TABLE 36	CHASSIS HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	126
TABLE 37	CHASSIS HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	126
TABLE 38	CHASSIS HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	127
7.6	BODY & LIGHTING HARNESS	127
7.6.1	TO BE LARGEST APPLICATION SEGMENT OF MARKET	127
TABLE 39	BODY & LIGHTING HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	127
TABLE 40	BODY & LIGHTING HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	128
TABLE 41	BODY & LIGHTING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	128
TABLE 42	BODY & LIGHTING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	128
7.7	HVAC HARNESS	129
7.7.1	ASIA PACIFIC TO DOMINATE MARKET	129
TABLE 43	HVAC HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	129
TABLE 44	HVAC HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	129
TABLE 45	HVAC HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	129
TABLE 46	HVAC HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	130
7.8	DASHBOARD/CABIN HARNESS	130
7.8.1	INTRODUCTION OF NEW INTERACTIVE FEATURES IN DASHBOARDS TO DRIVE MARKET	130
TABLE 47	DASHBOARD/CABIN HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	130

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TABLE 48	DASHBOARD/CABIN HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	131
TABLE 49	DASHBOARD/CABIN HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	131
TABLE 50	DASHBOARD/CABIN HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	131
7.9	BATTERY HARNESS	132
7.9.1	GROWING NUMBER OF CONNECTORS USED THROUGH BATTERIES IN VEHICLES TO DRIVE MARKET	132
TABLE 51	BATTERY HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	132
TABLE 52	BATTERY HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	132
TABLE 53	BATTERY HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	133
TABLE 54	BATTERY HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	133
7.10	SEAT HARNESS	134
7.10.1	GROWTH OF LUXURY VEHICLES TO DRIVE MARKET	134
TABLE 55	SEAT HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	134
TABLE 56	SEAT HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	134
TABLE 57	SEAT HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	134
TABLE 58	SEAT HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	135
7.11	SUNROOF HARNESS	135
7.11.1	INCREASING PENETRATION OF LUXURY SEGMENT VEHICLES IN DEVELOPED ECONOMIES TO DRIVE MARKET	135
TABLE 59	SUNROOF HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	135
TABLE 60	SUNROOF HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	136
TABLE 61	SUNROOF HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	136
TABLE 62	SUNROOF HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	136
7.12	DOOR HARNESS	137
7.12.1	STRINGENT SAFETY REGULATIONS FOR VEHICLES TO DRIVE MARKET	137
TABLE 63	DOOR HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	137
TABLE 64	DOOR HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	137
TABLE 65	DOOR HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	137
TABLE 66	DOOR HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	138
8	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY COMPONENT	139
8.1	INTRODUCTION	140
8.1.1	INDUSTRY INSIGHTS	140
FIGURE 34	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY COMPONENT, 2023 VS. 2030 (USD MILLION)	140
TABLE 67	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY COMPONENT, 2018-2022 (USD MILLION)	141
TABLE 68	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY COMPONENT, 2023-2030 (USD MILLION)	141
8.2	CONNECTORS	141
8.2.1	GROWING TREND OF HIGH-VOLTAGE CONNECTORS TO DRIVE MARKET	141
TABLE 69	CONNECTORS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	142
TABLE 70	CONNECTORS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	143
8.3	WIRES	143
8.3.1	INCREASING ADOPTION OF ADAS FEATURES IN VEHICLES TO DRIVE MARKET	143
TABLE 71	WIRES: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	144
TABLE 72	WIRES: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	144
8.4	TERMINALS	145
8.4.1	INCREASING PRODUCTION OF HEVS TO DRIVE MARKET	145
TABLE 73	TERMINALS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	145
TABLE 74	TERMINALS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	146
8.5	OTHERS	146
TABLE 75	OTHER COMPONENTS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	147



TABLE 76	OTHER COMPONENTS: AUTOMOTIVE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	147
9	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY MATERIAL TYPE	148
9.1	INTRODUCTION	149
9.1.1	INDUSTRY INSIGHTS	149
9.2	COMPARISON OF COPPER AND OPTICAL FIBER	149
TABLE 77	COPPER VS. OPTICAL FIBER	149
FIGURE 35	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY MATERIAL TYPE, 2023 VS. 2030 (USD MILLION)	150
TABLE 78	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY MATERIAL TYPE, 2018-2022 (USD MILLION)	150
TABLE 79	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY MATERIAL TYPE, 2023-2030 (USD MILLION)	150
9.3	METALLIC	151
TABLE 80	METALLIC WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	151
TABLE 81	METALLIC WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	151
9.3.1	COPPER	152
9.3.1.1	Increasing demand for electronic features in vehicles to drive market	152
TABLE 82	COPPER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	152
TABLE 83	COPPER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	152
9.3.2	ALUMINUM	153
9.3.2.1	Demand for vehicle weight reduction to drive market	153
TABLE 84	ALUMINUM WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	153
TABLE 85	ALUMINUM WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	154
9.3.3	OTHER MATERIALS	154
TABLE 86	OTHER MATERIALS-BASED WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	155
TABLE 87	OTHER MATERIALS-BASED WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	155
9.4	OPTICAL FIBER	155
TABLE 88	OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	156
TABLE 89	OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	156
9.4.1	PLASTIC OPTICAL FIBER	157
TABLE 90	PLASTIC OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	157
TABLE 91	PLASTIC OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	158
9.4.2	GLASS OPTICAL FIBER	158
TABLE 92	GLASS OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	158
TABLE 93	GLASS OPTICAL FIBER WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	159
10	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY MATERIAL TYPE	160
10.1	INTRODUCTION	161
10.1.1	INDUSTRY INSIGHTS	161
FIGURE 36	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY MATERIAL TYPE, 2023 VS. 2030 (USD MILLION)	162
TABLE 94	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY MATERIAL TYPE, 2018-2022 (USD MILLION)	162
TABLE 95	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY MATERIAL TYPE, 2023-2030 (USD MILLION)	162
10.2	METALLIC	163
TABLE 96	METALLIC WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, 2018-2022 (USD MILLION)	163
TABLE 97	METALLIC WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, 2023-2030 (USD MILLION)	163
10.2.1	COPPER	164
10.2.1.1	Superior electrical conductivity to drive market	164
TABLE 98	COPPER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, 2018-2022 (USD MILLION)	164
TABLE 99	COPPER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, 2023-2030 (USD MILLION)	165
10.2.2	ALUMINUM	165

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10.2.2.1	Lower weight and cost than copper to drive market	165
TABLE 100	ALUMINUM WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	166
TABLE 101	ALUMINUM WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	166
10.2.3	OTHER MATERIALS	166
TABLE 102	OTHER MATERIALS-BASED WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	167
TABLE 103	OTHER MATERIALS-BASED WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	167
10.3	OPTICAL FIBER	167
TABLE 104	OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	168
TABLE 105	OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	168
10.3.1	PLASTIC OPTICAL FIBER (POF)	168
10.3.1.1	Growing need for vehicle weight reduction to drive market	168
TABLE 106	PLASTIC OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	169
TABLE 107	PLASTIC OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	169
10.3.2	GLASS OPTICAL FIBER (GOF)	169
10.3.2.1	High-temperature tolerance and durability to drive market	169
TABLE 108	GLASS OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	169
TABLE 109	GLASS OPTICAL FIBER WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	170
11	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY TRANSMISSION TYPE	171
11.1	INTRODUCTION	172
11.1.1	INDUSTRY INSIGHTS	172
FIGURE 37	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY TRANSMISSION TYPE, 2023 VS. 2030 (USD MILLION)	172
TABLE 110	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY TRANSMISSION TYPE, 2018-2022 (USD MILLION)	173
TABLE 111	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY TRANSMISSION TYPE, 2023-2030 (USD MILLION)	173
11.2	DATA TRANSMISSION	173
11.2.1	DEVELOPMENT OF ADVANCED ELECTRICAL SYSTEMS IN VEHICLES TO DRIVE MARKET	173
TABLE 112	DATA TRANSMISSION HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	174
TABLE 113	DATA TRANSMISSION HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	174
11.3	ELECTRICAL WIRING	174
11.3.1	INCREASING INSTALLATION OF HIGH-END ELECTRONICS IN VEHICLES TO DRIVE MARKET	174
TABLE 114	ELECTRICAL WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	175
TABLE 115	ELECTRICAL WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	175
12	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE AND APPLICATION	176
12.1	INTRODUCTION	177
12.1.1	INDUSTRY INSIGHTS	177
12.2	NUMBER OF HARNESSES IN ICE VEHICLES, BY APPLICATION	177
TABLE 116	NUMBER OF HARNESSES IN ICE VEHICLES, BY APPLICATION (GLOBAL AVERAGE)	177
FIGURE 38	AUTOMOTIVE WIRING HARNESS MARKET FOR ICE VEHICLES, BY VEHICLE TYPE, 2023 VS. 2030 (USD MILLION)	178
TABLE 117	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE, 2018-2022 (UNITS)	178
TABLE 118	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE, 2023-2030 (UNITS)	179
TABLE 119	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE, 2018-2022 (USD MILLION)	179
TABLE 120	AUTOMOTIVE WIRING HARNESS MARKET, BY ICE VEHICLE TYPE, 2023-2030 (USD MILLION)	179
12.3	PASSENGER CAR	180
12.3.1	GROWING DEMAND FOR COMFORT AND LUXURY FEATURES TO DRIVE MARKET	180
TABLE 121	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (UNITS)	180
TABLE 122	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (UNITS)	181

TABLE 123	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, 2018-2022 (USD MILLION)	181
TABLE 124	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	181
TABLE 125	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (UNITS)	182
TABLE 126	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (UNITS)	182
TABLE 127	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (USD MILLION)	183
TABLE 128	PASSENGER CAR WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (USD MILLION)	183
12.3.1.1	Engine harness	184
12.3.1.2	Chassis harness	184
12.3.1.3	Body & lighting harness	184
12.3.1.4	HVAC harness	184
12.3.1.5	Dashboard/cabin harness	185
12.3.1.6	Battery harness	185
12.3.1.7	Seat harness	185
12.3.1.8	Sunroof harness	185
12.3.1.9	Door harness	185
12.4	LIGHT COMMERCIAL VEHICLE	185
12.4.1	INCREASING DEMAND FOR ADVANCED TECHNICAL FEATURES TO DRIVE MARKET	185
TABLE 129	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (UNITS)	186
TABLE 130	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (UNITS)	186
TABLE 131	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	186
TABLE 132	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	187
TABLE 133	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (UNITS)	187
TABLE 134	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (UNITS)	188
TABLE 135	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (USD MILLION)	188
TABLE 136	LIGHT COMMERCIAL VEHICLE WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (USD MILLION)	189
12.4.1.1	Engine harness	189
12.4.1.2	Chassis harness	189
12.4.1.3	Body & lighting harness	189
12.4.1.4	HVAC harness	190
12.4.1.5	Dashboard/cabin harness	190
12.4.1.6	Battery harness	190
12.4.1.7	Door harness	190
12.5	BUS	190
12.5.1	EXPANSION OF PUBLIC TRANSPORTATION SERVICES TO DRIVE MARKET	190
TABLE 137	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (UNITS)	190
TABLE 138	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (UNITS)	191
TABLE 139	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	191
TABLE 140	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	191
TABLE 141	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (UNITS)	192
TABLE 142	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (UNITS)	192
TABLE 143	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (USD MILLION)	193
TABLE 144	BUS WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (USD MILLION)	193
12.5.1.1	Engine harness	194
12.5.1.2	Chassis harness	194
12.5.1.3	Body & lighting harness	194

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12.5.1.4	HVAC harness	194
12.5.1.5	Dashboard/cabin harness	194
12.5.1.6	Battery harness	195
12.5.1.7	Door harness	195
12.6	TRUCK	195
12.6.1	HIGHER NUMBER OF WIRING HARNESSES OWING TO LARGE SIZE OF TRUCKS TO DRIVE MARKET	195
TABLE 145	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (UNITS)	195
TABLE 146	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (UNITS)	196
TABLE 147	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2018-2022 (USD MILLION)	196
TABLE 148	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY REGION, 2023-2030 (USD MILLION)	196
TABLE 149	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (UNITS)	197
TABLE 150	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (UNITS)	197
TABLE 151	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2018-2022 (USD MILLION)	198
TABLE 152	TRUCK WIRING HARNESS MARKET FOR ICE VEHICLES, BY APPLICATION, 2023-2030 (USD MILLION)	198
12.6.1.1	Engine harness	199
12.6.1.2	Chassis harness	199
12.6.1.3	Body & lighting harness	199
12.6.1.4	HVAC harness	199
12.6.1.5	Dashboard/cabin harness	199
12.6.1.6	Battery harness	199
12.6.1.7	Door harness	199
13	48V AND EV WIRING HARNESS ARCHITECTURE	200
13.1	GROWING TREND OF VEHICLE ELECTRIFICATION	200
FIGURE 39	ELECTRIC VEHICLE ECOSYSTEM	200
13.2	NEW AND UPCOMING ELECTRIC VEHICLE MODELS, 2023-2026	201
TABLE 153	NEW AND UPCOMING ELECTRIC VEHICLE MODELS, 2023-2026	201
13.3	OEMS AND THEIR EV INVESTMENTS	203
TABLE 154	AUTOMAKERS' TARGETS AND INVESTMENTS FOR ONGOING EV SHIFT	203
TABLE 155	ELECTRIC VEHICLE MARKET DYNAMICS	204
TABLE 156	GLOBAL KEY DEVELOPMENTS, 2020-2021	204
13.4	NEED FOR 48V ARCHITECTURE	205
FIGURE 40	MAIN DRIVERS OF 48 V ARCHITECTURE	205
FIGURE 41	12V AND 48V ELECTRICAL ARCHITECTURE	206
13.4.1	REDUCED CO2 EMISSIONS TO IMPROVE FUEL ECONOMY	206
13.4.2	ENGINE DOWNSIZING TO IMPROVE DRIVABILITY	207
13.5	IMPACT OF 48V ARCHITECTURE ON AUTOMOTIVE WIRING HARNESS MARKET	207
13.5.1	IMPACT ON AUTOMOTIVE WIRING HARNESS MARKET	207
13.5.2	ELECTRIC VEHICLE WIRING HARNESS	208
13.5.2.1	Pipe-shielded wiring harness	208
13.5.2.2	Power cable	208
13.5.2.3	Direct connector	209
13.6	48V PASSENGER CAR WIRING HARNESS MARKET, BY REGION	209
13.6.1	ASIA PACIFIC	209
13.6.2	EUROPE	210
TABLE 157	EURO 6 POLLUTANT REGULATION DETAILS	210
13.6.3	NORTH AMERICA	211
14	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TYPE AND APPLICATION	213

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14.1	INTRODUCTION	214
14.1.1	INDUSTRY INSIGHTS	214
14.2	TOTAL HARNESSES IN ELECTRIC VEHICLES	214
TABLE 158	TOTAL HARNESSES IN ELECTRIC VEHICLES (GLOBAL AVERAGE)	214
14.3	OPERATIONAL DATA	215
FIGURE 42	BEV: WIRING HARNESS ARCHITECTURE	215
FIGURE 43	PHEV: WIRING HARNESS ARCHITECTURE	215
FIGURE 44	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY VEHICLE TYPE, 2023 VS. 2030 (USD MILLION)	216
TABLE 159	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY VEHICLE TYPE , 2018-2022 (UNITS)	216
TABLE 160	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY VEHICLE TYPE, 2023-2030 (UNITS)	216
TABLE 161	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY VEHICLE TYPE, 2018-2022 (USD MILLION)	217
TABLE 162	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	217
14.4	BATTERY ELECTRIC VEHICLE (BEV)	218
14.4.1	STRONG GOVERNMENT SUPPORT AND FAVORABLE POLICIES IN ASIA PACIFIC TO DRIVE MARKET.	218
TABLE 163	BEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	218
TABLE 164	BEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	218
TABLE 165	BEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	218
TABLE 166	BEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	219
TABLE 167	BEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (UNITS)	219
TABLE 168	BEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (UNITS)	220
TABLE 169	BEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (USD MILLION)	220
TABLE 170	BEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (USD MILLION)	221
14.4.2	CHASSIS HARNESS	221
14.4.3	BODY & LIGHTING HARNESS	221
14.4.4	HVAC HARNESS	221
14.4.5	DASHBOARD/CABIN HARNESS	222
14.4.6	BATTERY HARNESS	222
14.4.7	SEAT HARNESS	222
14.4.8	SUNROOF HARNESS	222
14.4.9	DOOR HARNESS	222
14.5	PLUG-IN HYBRID ELECTRIC VEHICLE (PHEV)	222
14.5.1	BATTERY HARNESS TO BE LARGEST APPLICATION SEGMENT OF PHEV MARKET	222
TABLE 171	PHEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	222
TABLE 172	PHEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	223
TABLE 173	PHEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	223
TABLE 174	PHEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	223
TABLE 175	PHEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (UNITS)	224
TABLE 176	PHEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (UNITS)	224
TABLE 177	PHEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (USD MILLION)	225
TABLE 178	PHEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (USD MILLION)	225
14.5.2	TRACTION HARNESS	226
14.5.3	ENGINE HARNESS	226
14.5.4	CHASSIS HARNESS	226
14.5.5	BODY & LIGHTING HARNESS	226
14.5.6	HVAC HARNESS	226
14.5.7	DASHBOARD/CABIN HARNESS	226
14.5.8	BATTERY HARNESS	226

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14.5.9	SEAT HARNESS	226
14.5.10	SUNROOF HARNESS	227
14.5.11	DOOR HARNESS	227
14.6	FUEL CELL ELECTRIC VEHICLE (FCEV)	227
14.6.1	BODY & LIGHTING HARNESS TO BE LARGEST APPLICATION SEGMENT OF FCEV MARKET	227
TABLE 179	FCEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (UNITS)	227
TABLE 180	FCEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (UNITS)	227
TABLE 181	FCEV WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION)	228
TABLE 182	FCEV WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION)	228
TABLE 183	FCEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (UNITS)	228
TABLE 184	FCEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (UNITS)	229
TABLE 185	FCEV WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (USD MILLION)	229
TABLE 186	FCEV WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (USD MILLION)	230
14.6.2	TRACTION HARNESS	230
14.6.3	CHASSIS HARNESS	230
14.6.4	BODY & LIGHTING HARNESS	230
14.6.5	HVAC HARNESS	230
14.6.6	DASHBOARD/CABIN HARNESS	231
14.6.7	BATTERY HARNESS	231
14.6.8	SEAT HARNESS	231
14.6.9	SUNROOF HARNESS	231
14.6.10	DOOR HARNESS	231
15	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TRANSMISSION TYPE	232
15.1	INTRODUCTION	233
15.1.1	INDUSTRY INSIGHTS	233
FIGURE 45	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TRANSMISSION TYPE, 2023 VS. 2030 (USD MILLION)	233
TABLE 187	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TRANSMISSION TYPE, 2018-2022 (USD MILLION)	234
TABLE 188	AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY TRANSMISSION TYPE, 2023-2030 (USD MILLION)	234
15.2	DATA TRANSMISSION	234
15.2.1	INCREASING ADOPTION OF USER-FRIENDLY FEATURES IN EVS TO DRIVE MARKET	234
TABLE 189	DATA TRANSMISSION: AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	235
TABLE 190	DATA TRANSMISSION: AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	235
15.3	ELECTRICAL WIRING	235
15.3.1	RAPID EXPANSION OF EV INDUSTRY TO DRIVE MARKET	235
TABLE 191	ELECTRICAL WIRING: AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2018-2022 (USD MILLION)	236
TABLE 192	ELECTRICAL WIRING: AUTOMOTIVE WIRING HARNESS MARKET FOR ELECTRIC VEHICLES, BY REGION, 2023-2030 (USD MILLION)	236
16	HIGH-VOLTAGE WIRING HARNESS MARKET, BY APPLICATION	237
16.1	INTRODUCTION	238
TABLE 193	HIGH-VOLTAGE CABLE PROTECTION	239
16.1.1	INDUSTRY INSIGHTS	239

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FIGURE 46 HIGH-VOLTAGE WIRING HARNESS MARKET, BY APPLICATION, 2023 VS. 2030 (USD MILLION) 239

TABLE 194 HIGH VOLTAGE WIRING HARNESS MARKET, BY APPLICATION, 2018-2022 (USD MILLION) 240

TABLE 195 HIGH VOLTAGE WIRING HARNESS MARKET, BY APPLICATION, 2023-2030 (USD MILLION) 240

16.2 BATTERY & BATTERY MANAGEMENT 240

16.2.1 GROWING POPULARITY OF ELECTRIC CARS TO DRIVE MARKET 240

TABLE 196 BATTERY & BATTERY MANAGEMENT: HIGH-VOLTAGE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION) 241

TABLE 197 BATTERY & BATTERY MANAGEMENT: HIGH-VOLTAGE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION) 241

16.3 MOTOR MANAGEMENT 241

16.3.1 INCREASING CONSUMER INTEREST IN BEVS TO DRIVE MARKET 241

TABLE 198 MOTOR MANAGEMENT: HIGH-VOLTAGE WIRING HARNESS MARKET, BY REGION, 2018-2022 (USD MILLION) 242

TABLE 199 MOTOR MANAGEMENT: HIGH-VOLTAGE WIRING HARNESS MARKET, BY REGION, 2023-2030 (USD MILLION) 242

**Automotive Wiring Harness Market by Application (Engine, Chassis, Cabin, Body & Lighting, HVAC, Battery, Dashboard/Cabin, Seat, Sunroof, Door), ICE & EV Transmission Type, Data Rate, Component Material & Region - Global Forecast to 2030**

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