

Ambient Lighting Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Ambient Lighting Market is expected to register a CAGR of 8.9% over the forecast period. The rising demand for comfortable and innovative lighting solutions and the need for energy-efficient solutions may create an opportunity for the ambient lighting market. Compared to traditional lighting solutions, such as incandescent, halogen, compact fluorescent lamps (CFLs), etc., energy-efficient lightbulbs such as LEDs typically use about 25%-80% less energy and last about 3-25 times longer.

Key Highlights

The ongoing technological evolutions, such as smart lighting systems in commercial or residential buildings, increasing infrastructural projects worldwide, and consumer preferences for better interior lighting design, favor the market's growth. Moreover, the rising concerns over global climate change have led to the implementation of various rules and regulations about energy efficiency. The increasing inefficiency of incandescent bulbs, owing to excess heat generation, is making these solutions a more preferred option, thus aiding the ambient lighting market growth.

However, replacing traditional systems with ambient light leads to high replacement costs and is one of the hindering factors for the market growth during the forecast period. The global demand for LED lighting solutions is growing fast. With the advent of smart LED solutions, the adoption rate of LED is expected to increase further, driving the demand for ambient lighting.

The Department of Energy estimates that LED A-type lamps will achieve a 56% penetration by 2025 in the installed stock. Thus, as LEDs continue to reduce cost-wise and grow functionality-wise, they are expected to deliver greater convenience, comfort, aesthetics, and control options that homeowners require.

Since the outbreak of COVID-19, various businesses have faced challenges in the supply chain. The ambient lighting market is no exception. Since a prominent share of the raw materials for producing LEDs originated from Asian countries, the industry was significantly influenced during March and April, as the region was under the severe clutches of the pandemic. However, the global LED demand is expected to see lower scale impacts due to the stringent regulations in countries related to the usage of

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LED-based solutions for energy efficiency; yet, the market may see sluggish growth in connected solutions.

Ambient Lighting Market Trends

LEDs to Hold Significant Market Share

LED lighting systems use up to 50% less energy to generate an equivalent light intensity emitted by cold cathode fluorescent lamps (CCFL) and compact fluorescent lamps (CFL). The reduced energy consumption directly converts into a reduction of over 700 million metric tons of carbon dioxide emissions annually. Thus, LEDs are expected to completely replace CFLs and CCFLs during the forecast period. This factor is expected to drive the ambient lighting market shortly. Moreover, LEDs are UV radiation-free and neutral, which makes them more suitable for indoor lighting. Additionally, they are ideal for people with photoreactive sickness. The rays emitted from the light-emitting diodes are safe. Additionally, the LED lighting market is mainly driven by advantageous features offered by LED lights, such as increased energy efficiency, longer lifetime, enhanced physical strength, smaller size, design flexibility, and environmental friendliness. According to MeitY (India), LED production across India was valued at about INR 163 Billion (~USD 2.19 billion) in the financial year 2021. The statistics indicated an increase from the previous financial year, which was INR 162.5 Billion (~USD 2.18 Billion). Moreover, LED lighting solutions offer dimmable controls, and this feature is increasingly adopted in the residential sector and commercial buildings. As per the Lighting Controls Association, a part of the National Electrical Manufacturers Association (NEMA), prices of dimmable LEDs are dropping to levels comparable with standard on/off switches. All the factors mentioned above are expected to accelerate the LED lighting market, which may create a demand for ambient lighting during the forecast period.

Asia-Pacific to Witness Significant Growth

The Asia-Pacific region is witnessing the fastest growth due to rampant infrastructure-building activities in emerging economies, such as China and India. Additionally, the various regional governments are also focusing on implementing stringent regulations and legislation on energy efficiency. Thus, this is further supporting the growth of the ambient lighting market in this region. For instance, initiatives from the Indian government, such as Deen Dayal Upadhyay Gram Jyoti Yojana (DDUGJY) and Integrated Power Development Scheme (IPDS), have already been implemented for rural and urban areas, respectively. Also, India is expected to become the world's first country to use LEDs for all lighting needs annually. Such a colossal implementation will aid the growth of the ambient lighting market. The hundred million LED lights resulted in an annual saving of 6.7 billion units and avoided 1,119.40 MW of peak power demand. The EESL plans to bring INR 80 billion (~USD 1.07 billion) in investment by 2024 to cover rural India in the next 4-5 years. It is anticipated that more than 30 million LED lights will be retrofitted/installed by EESL. Under SLNP, Andhra Pradesh leads the way in installing LED lights, followed by Rajasthan and UP. Moreover, these lights are used in automotive lighting systems as well. India, China, Japan, and South Korea are some of the major countries which hold the majority of vehicle production, thus, offering growth opportunities for the automotive lighting market. The rapid urbanization and changing lifestyles of people in the country have also increased the penetration of LED lighting in the building and construction industries. The compatible size and aesthetic look have drawn the attention of people with high standards, which resulted in significant growth in the adoption of ambient lighting.

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The Ambient Lighting Market is highly competitive and fragmented. Some of the players in this market include GE Lighting, Samsung Electronics Co. Ltd, Koninklijke Philips NV, OSRAM Licht AG, The Zumtobel Group, Wipro Consumer Care & Lighting Ltd, Hafele America Co., Acuity Brands Inc., and many more. The rising competition among major players to offer advanced technology-based solutions in the ambient lighting market is making them invest increasingly in R&D.

In October 2022, Osram and TacoTek announced that they cooperated to help revolutionize the car interior market by delivering thin, seamlessly integrated, three-dimensional illuminated structures. The companies have developed a demonstrator with the new RGB side-looker OSIRE E5515 LED from ams Osram, which with TactoTek's IMSE technology, can be integrated into automotive interiors in new types of space-saving design. The LED offers a brightness performance of 1100 mcd for red, 2600 mcd for green, and 500 mcd for blue color at 20 mA. Also, deep blue colors are available.

Similarly, in August 2022, Hafele Singapore partnered with SIXiDES Asia. It was an opportunity for Hafele Singapore to announce its new lighting and storage solutions. Over 60 interior designers got an exclusive first look and training at the gathering using Hafele's most recent lighting selection, LOOX LED and storage range, Kosmo.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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