Stage Lighting Market - Global Outlook and Forecast 2023-2028

Market Report | 2023-03-16 | 476 pages | Arizton Advisory & Intelligence

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Report description:

The global stage lighting market is expected to grow at a CAGR of 4.55% from 2022 to 2028

MARKET TRENDS & OPPORTUNITIES

Night Clubs, Bars, And Resto Bars Gaining Traction In APAC

The ever-changing trend in people's lifestyles and behavior has contributed to the growing popularity of bars and pubs in the APAC countries. Consumer lifestyle is changing with the rising IT and BPO sectors in India and other APAC countries. Such factors have resulted in rising disposable income, which the younger generation is ready to spend on leisure and entertainment and visit pubs, nightclubs, resto-bars very often. The economic impact of the nightclub industry extends far to the stage lighting market.

Increased Demand For Technically Advanced Products

The stage lighting market is driven by technologically reformed products and has witnessed a range of new features penetrating its value chain. A vast range of products is making a difference across the industry due to continuous innovation and quality improvements. Technology has been an integral part of this market, from traditional lamps to modern-day smart wireless light controllers.

INDUSTRY RESTRAINTS

Volatility In Raw Material Prices

Raw materials constitute the single largest cost component in the stage lighting fixtures and control solutions market, comprising approximately 40% to 60% of the overall cost of production. Prices of major raw materials used to manufacture stage lighting fixtures and control solutions, such as steel, aluminum, plastic, and rubber, have increased significantly over the last few years.

The volatility of raw material prices also seriously threatens vendor profit margins in the stage lighting market. Other operating expenses, such as labor wages, are also rising. Rising raw materials cost further surged manufacturing costs by another band of 5% to 7%, narrowing profit margins. Adding to all these costs, Chinese manufacturers add more worries to the company's top line as they bring up low-cost products. These factors burden vendors that strive to produce efficient stage lighting solutions at affordable costs to cope with increasing market competition.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global stage lighting market by product type is categorized into stage lighting fixtures and stage lighting control. The stage lighting fixtures is the dominating market and was valued at USD 2.03 billion in 2022. Stage lighting fixtures are a key component in live performances and events. They are designed to provide a controlled light source to enhance the audience's visual experience. They include traditional incandescent lights, LED lights, moving head lights, and more.

Segmentation by Product

- Lighting Fixture
- Lighting Controller

INSIGHTS BY STAGE LIGHTING FIXTURE

The global PARs stage lighting market was valued at USD 417.56 million in 2022. PARs are the most widely used fixtures in concert lighting and theatrical performances. Often called PAR cans, these fixtures have beam lamps held by aluminum-coated metal hoods of parabolic shape. Most of these fixtures produce a soft-edged oval or circular pool of lights. Various lamps can be used to produce different beam shapes and sizes. Concerning functionality, PARs are one of the market's most cost-efficient stage lighting fixtures with few features such as focus or shuttering.

Segmentation by Stage Lighting Fixture

- Lighting Fixture
  - PARs
  - Striplights & Cyc Lights
  - Ellipsoidals
  - Fresnels
  - Followspots
  - Beam Projectors
  - Scoops
- Fixture Movement
  - Automated/ Intelligent Fixtures
  - Static Fixtures
- Light Source
  - Conventional Stage Lighting
  - LED Stage Lighting

INSIGHTS BY LIGHTING CONTROL SYSTEMS

The global stage lighting market by lighting control systems was valued at USD 489.88 million in 2022. Stage lighting control systems have been developed from the era when they required multiple assistants to control stage lighting during concerts, stage shows, and other events. The advent of intelligent stage lighting control systems helps vendors overcome the problems associated with traditional systems, such as high cost, low intelligence, and cost associated with installation and deployment, among others. An intelligent lighting control system has a user interface that is designed in such a way that it makes controlling stage lighting fixtures easy and convenient.

Segmentation by Lighting Control Systems

- Stage Lighting Controllers
- Stage Lighting Visualizers

INSIGHTS BY END-USERS

The touring rental segment dominated the stage lighting market with a share of 64.94% in 2022. Touring rental refers to providing lighting equipment and services for live events, concerts, and tours. This segment is driven by the increasing popularity of live events and the need for lighting solutions that can be easily transported and set up in different venues. Touring rental companies typically offer a wide range of lighting fixtures and control systems to meet the specific needs of each event. They also provide skilled technicians to operate and maintain the equipment.

Segmentation by End-Users

- Touring Rental
- Fixed installation

INSIGHTS BY APPLICATION TYPE

Concerts application dominated the global stage lighting market, accounting for a 56% share. The increasing number of live performances, the growing number of music concerts and festivals, and the growth in the number of music tours by celebrities will help this segment to gain some market share during the forecast period. Pop, classical, and jazz concerts are the most famous concerts worldwide; this has also been noticed that the highest number of pop music concerts are held in Italy.

Segmentation by Application

- Concerts
- Corporate Events
- Broadcast Industry
- Weddings/Events
- Hospitality Industry
- Architectural and Commercial Installs
- Houses of Worship
- DJ Retail/Rec DJ
- Theatres
- Fitness Sports
- Nightclubs

INSIGHTS BY DISTRIBUTION CHANNEL

The distribution channel of the global stage lighting market is fragmented dynamically. The various products used for the stage lighting market, such as LED lights, fixtures, and controllers, are marketed and distributed using various channels. With thousands of new competitors entering the market, the pre-established distribution channels have drastically changed. Currently, consumers have a wide variety of options (i.e., touring rentals and fixed installers). They can avail products either directly from manufacturers or online on the internet. Companies like Philips have attained a reputable name in the industry due to their robust distribution channel. The company even increased its service centers from 125 to 190 and has more than 900 technicians enlisted to provide support and resolve customer queries.

Segmentation by Distribution Channel

- Manufacturer And Channel Partners
- Distributors In The Channel Network
- Retail Distribution In the Lighting Industry
- Online Distribution Channel Network

GEOGRAPHICAL ANALYSIS

North America was the largest segment of the global stage lighting market, accounting for a share of 34.82%. The penetration of stage lighting fixtures remains at an all-time high in the U.S. and Canada, with the U.S. holding the maximum market share of 63.70%. Factors such as the high spending power of millennials and boomers, growing participation in music festivals, increased adoption of smartphones, inclination toward new technology, and high urbanization are driving industry growth in North America.

Segmentation by Geography

- North America
  - US
  - Canada
- Europe
  - UK
  - Germany
  - France
  - Italy
  - Spain
  - Nordics
  - Rest of Europe
- APAC
  - Japan
  - China
  - Australia
  - South Korea
  - India
  - Rest of APAC
- Latin America
  - Brazil
  - Mexico
  - Rest of Latin America

-Middle East & Africa
oSaudi Arabia
oUAE
oSouth Africa
oRest of the Middle East & Africa

VENDOR LANDSCAPE

The global stage lighting market is highly fragmented, with many local and international players. The competition among these players is intense. The rapidly changing technological environment can adversely affect vendors as customers expect continual innovations and upgrades in LED fixtures. The present scenario forces vendors to alter and refine their unique value proposition to achieve a strong market presence. The leading vendors in the industry are Philips Lighting, OSRAM, and HARMAN International (Samsung). The competition among these key players is intense.

Key Company Profiles

-HARMAN International (Samsung)
-OSRAM
-Signify Holding (Philips)

Other Prominent Vendors

-Absen America
-Altman Lighting
-ANTARI LIGHTING ? EFFECTS
-Apollo Design Technology
-Ayrton
-Blizzard Lighting
-Chauvet Professional
-Chroma-Q
-City Theatrical
-Core Lighting
-Dexel
-Eaton Electrical Systems
-Elektralite
-Elation Professional
-ENTTEC
-Epsilon Professional Lighting
-ETC
-German Light Products
-Golden Sea Professional Equipment
-Kumho Electric
-Leprecon
-Litetronics International
-Lycian Stage Lighting
-MA Lighting Technology
-Mighty Bright

- MLS
- Nicolaudie
- Pathway Connectivity
- PROEL
- Red Lighting
- Rosco
- SGM Light A/S
- Studio Due
- Techni-Lux
- Teclumen
- Ultra-Tech Lighting
- Ushio Lighting
- Zumtobel Group
- Robert Juliat

KEY QUESTIONS ANSWERED:

1. How big is the stage lighting market?
2. What is the growth rate of the stage lighting market?
3. Who are the key players in the global stage lighting market?
4. What are the key driving factors in the stage lighting market?
5. Which region dominates the global stage lighting market?

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