

Europe Automotive Adaptive Lighting System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe automotive adaptive lighting system market was valued at USD 6.75 billion in the current year and is projected to grow to USD 15.05 billion by the next five years, registering a CAGR of 14.97% in terms of revenue during the forecast period.

Key Highlights

- The COVID-19 pandemic had a negative impact on the market studied, primarily attributed to halted manufacturing activities. With that, the economic slowdown, coupled with the tariffs imposed on importing lights and other products, is expected to hamper the growth of this market. In addition to that, country-specific regulations for external auxiliary lights might affect the growth of the market studied.
- Over the medium term, with the situation easing, many vehicle manufacturers are showing great interest in integrating LED lights in vehicles, as these lights consume less power and have a longer life compared to halogen and HID lights. Furthermore, LED lights offer durability and strength, high-quality.
- The automotive manufacturers are investing in developing new lighting technologies and solutions that are focusing on the major lighting application, headlights. OEMs are launching vehicles with adaptive headlights to provide a safe driving experience at night.
- Trends such as autonomous vehicles and electric vehicles are evolving vehicle lighting systems. Industry participants are working intensively on various new technologies for vehicle lights with a variety of new functionalities and which can be adapted to the continuously changing requirements of future vehicles.
- Nighttime safety continues to be a major concern for transportation agencies across the region. adaptive lighting has been widely used as a countermeasure for nighttime crashes and due to lower LED and Halogen costs the demand for such adaptive lighting system expected to gain significance over the forecast period.
- Vehicle manufacturers are designing, prototyping, and testing the possibilities for external lighting. For example, Volkswagen is

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working on a technology that projects a pair of red warning lines on the road, when a car is turning around, thereby, letting pedestrians know where the danger zone is and presumably eliminating the problem of backing out of a high-fenced driveway, into the path of a cyclist on the footpath.

Europe Automotive Adaptive Lighting System Market Trends

Growing Adoption of Advanced Safety Features in Vehicles

- Smart headlights are safer for nighttime driving because they illuminate more of the road without blinding other drivers, as driving with high beams on would. The study found that ADB headlights are as much as 86 percent better at providing consistent illumination in the presence of oncoming traffic.
- To overcome such challenges, several manufacturers are inclining towards the usage of smart headlights in their vehicles. Smart headlights are also known as adaptive driving beam (ADB) headlights, and such technology employs full illumination that is modified via cameras and sensors that adapt the shape, brightness, and direction of the light depending on the driving conditions.
- However, as the fitment of automatic switching functions has become more widespread, and the technology controlling this functionality has rapidly evolved, it has become apparent that some of the requirements currently specified in UN ECE Regulation No. 48 lack clarity, leading to differing interpretations of the requirements, and are not fully consistent in their application to different lamp switching functions.
- To address the rising safety concerns, various technological advancements from different companies have been witnessed in the recent past. For instance, in May 2023, Buick, a General Motors subsidiary, unveiled the next-generation LaCrosse - a full-sized sedan. The vehicle is also equipped with Matrix adaptive headlamps with 222 LED lighting sources and nine intelligent lighting modes.
- To lower the number of accidents in the nation, the Ministry of Road Transport and Highways announced that it is working on making ADAS (advanced driver assistance systems) essential for automobiles. For instance,
- As of mid-2022, all new cars put on the EU market may have to be equipped with advanced safety systems. Following an agreement with the European Parliament in March 2021, the EU Council adopted a regulation on the general safety of motor vehicles and the protection of vehicle occupants and vulnerable road users in a bid to significantly reduce the number of road casualties. Additionally, Euro NCAP, a government-backed group that rates cars for safety, may require cars to have a driver-monitoring system to earn a five-star safety rating starting in 2023 or 2024.
- Under the new rules, all motor vehicles (including trucks, buses, vans, and sport utility vehicles) may have to be equipped with the following safety features: intelligent speed assistance, alcohol interlock installation facilitation, driver drowsiness, and attention warning systems, advanced driver distraction warning systems, emergency stop signals, reversing detection systems, event data recorders, accurate tire pressure monitoring, etc.
- With the above-mentioned development across the region, the market is witnessing major growth during the forecast period.

Germany Witnessing Major Growth

- Germany witnessed an increase in the number of vehicles, including both passenger cars and commercial vehicles, in 2021 and 2022 compared to 2020. In 2021, around 3.3 million automobiles were sold in the country, which rose to an approximate total of 3.67 million units in 2022, indicating an approximate 11.21 percent increase from the previous year. Vehicle sales are predicted to climb in the forecasted period, contributing to the rising value of the automotive adaptive lighting market as life returns to routine and automotive technology advances.

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- The German automobile sector is considered the world leader, with industry titans such as Volkswagen, Daimler-Benz, Porsche, BMW, and others. With a stake of more than 35%, the automobile sector in the country accounts for a large portion of the country's R&D investment. As a result of the existence of these premium automobile manufacturers, innovative lighting technology is increasing. For instance,
 - Mercedes-Benz's lighting technology improved visibility by 60%. This lighting system has active lighting and cornering capabilities. In addition, the corporation has invested EUR 2.1 billion in the development of a manufacturing factory in Sindelfingen. This is projected to increase S-Class output by 25 percent in the future.
 - To remain ahead of their competition, major firms in the country are developing a variety of innovative solutions. For instance, in March 2022, OSRAM announced the agreement to sell the independent and dedicated AMLS (Automotive Lighting Systems GmbH) business to Plastic Omnium for a purchase price of EUR 65 million. The transaction represents a further step in the implementation of ams OSRAM's previously communicated strategy to focus on dedicated strategic core technology and divesting businesses that are not seen as core to the corporate strategy. AMLS offers the technological brick that will provide Plastic Omnium with cutting-edge expertise in lighting technologies, electronics, and software to develop innovative lighting solutions for the automotive industry.
 - In December 2021, OSRAM introduced the brightest LED for automobile front headlights on the market. Based on the aforementioned developments, the Germany Segment is to have decent growth during the forecast period.

Europe Automotive Adaptive Lighting System Industry Overview

The European automotive adaptive lighting systems market is dominated by a few players, such as HELLA KGaA Hueck & Co., Stanley Electric., Philips, Valeo Group, and Others. The market is highly driven by factors like advanced technology, more use of sensors, growing investment in R&D projects, and a growing market of electric and autonomous vehicles. To provide the safest experience to the car owner, major automotive adaptive lighting system manufacturers are developing new technology for the future and acquiring small players to expand their market reach. For instance,

In March 2022, ZKW was a partner of the Swedish electric vehicle manufacturer Polestar. The 'Polestar 0' project aims to develop and launch a completely climate-neutral automobile by 2030. For this ambitious project, the Wieselburg-based lighting systems specialist will develop electronic and electrical components for Polestar. ZKW is also converting to CO2-neutral production worldwide by 2025.

In February 2022, Motherson company and Valeo signed a Memorandum of Understanding (MoU), which aims to create the vehicle interior of the future through the integration of lighting systems with advanced surface finishes.

In February 2022, Marelli announced that it would supply the new Alfa Romeo Tonale with Full-LED Adaptive Matrix Headlights. This system incorporates modes, such as "Adaptive Low Beam" and "Adaptive Driving Beam." The "Adaptive Low Beam" mode includes City, Country, Highway, and Bad Weather modes, as well as static bending lights. The "Adaptive Driving Beam" contains "Glare-Free High Beam Segmented Technology," which automatically detects traffic in front and on the opposite side of the vehicle to avoid glaring other vehicles.

Additional Benefits:

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

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