

Asia Pacific LED Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia Pacific LED Packaging Market is expected to register a CAGR of 6.7% during the forecast period.

Key Highlights

- The LED technology has been capturing the imagination of the lighting industry by offering small and efficient lighting solutions to a diverse set of consumers with enhanced efficiency. Innovations in the industry are saturated, and at the same time, the market has overcapacity. For TV display applications, the industry is moving from OLED to QLED (Quantum dot Light-emitting diode), which is the latest innovation. This is expected to penetrate more into the market.
- The production costs of QLED displays will be decreased since fixed costs (equipment) are less, and variable costs are relatively less as more units can be produced within a given time. Companies are focusing on operating through economies of scale. As such, the industry is witnessing the consolidation of players/manufacturers of LED packaging.
- In the coming years, rapid advancements in LED package applications are projected to boost innovation and consumption, propelling the LED packaging market. On the other hand, high saturation may limit product acceptance, which, in turn, limits market growth.
- The high competition in the market with players such as Samsung Electronics, Osram, and Nichia is restricting the margin, as there is a continuous decline in prices by players to gain market share.
- Moreover, governmental initiatives are also anticipated to drive the market's growth. For instance, the Indian government's planned to deploy cost-effective LEDs across multiple sectors. The country is on the verge of replacing all its street lamps with LEDs and adopting smart LEDs for traffic signals as well. This move is likely to increase the demand for local LED manufacturers, resulting in the growth of the LED packaging market.

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APAC LED Packaging Market Trends

Increasing Demand for Energy-efficiency Significantly Drives the Market

- Owing to the sheer increasing efficiency of LED lighting systems, the Asia-Pacific region has been experiencing a fundamental transition in its deployed lighting systems, with firms in the regions embracing LEDs in multiple sectors.
- Multiple governmental and private initiatives have been driving the need for smart and efficient lighting systems in the modernization and development of infrastructure such as smart cities across the region, which directly boosts the market for LED packages in the region.
- Government initiatives for energy efficiency in the Asia Pacific region immensely contribute to the development of the LED packaging market. Several Government schemes and plans are in progress in countries such as India and China to promote energy efficiency. Unnat Jyoti by Affordable LEDs for All (UJALA) initiative by the Indian Government to encourage energy efficiency in the country launched in 2015 has already distributed more than 36 crores LED light bulbs as of August 2021.
- The increase in the adoption of high-end consumer electronics, like wearable and smartphones in China, Japan, India, among others, also significantly increases the demand for micro-LED and flash LED packages, which tend to be significantly efficient as compared to previous generation displays.

Chip Scale Package (CSP) is Expected to Grow Significantly Over the Forecast Period

- A chip scale package (CSP) LED package has a close-ratio between the volume of the LED chip and the total volume of the LED package. It is essentially a bare LED die on which a phosphor layer is coated, with the underside of the die metalized with the P and N contacts to form the electrical connection and thermal path.
- The growing demand for CSP LED architecture is the latest incarnation of flip-chip LEDs and prevents light loss due to the mounting of electrode pad on the upside of the P-type GaN layer while improving heat transfer efficiency and package reliability.
- Vendors in the market are introducing new products to maintain their competitive advantage. For instance, Samsung introduced LM101B CSP LEDs that use a film phosphor in the conversion layer to reduce surface roughness and enable uniform control of thickness with small color dispersion. The fillet-enhanced CSP (FEC) technology forms TiO₂ (Titanium dioxide) walls around the chip surface to reflect its light output toward the top, enabling the mid-power CSP to deliver an industry-leading efficacy of up to 205 lm/W (65mA, CRI 80+, 5000K).
- Moreover, some of the vendors offer Chip Scale Package (CSP) LEDs to a specific application. For instance, OSRAM designs CSP LEDs for high-class retail lighting in brand fashion boutiques and jewelry stores. Professional designs for customized CoB and small luminaires are the main applications being supported by CSP.

APAC LED Packaging Industry Overview

The Asia Pacific LED packaging market is competitive and consists of several major players. In terms of market share, few of the major players currently dominate the market. These major players with prominent shares in the market are focusing on expanding their customer base across foreign countries as well by leveraging strategic collaborative initiatives to increase their market share and profitability.

- July 2021: OSRAM partnered with ViewSonic for more possibilities in developing LED projectors by using OSRAM's Ostar Projection Power LED as a light source for ViewSonic LS600W and achieving a brightness of up to 3,000 ANSI lumens, providing

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exceptional performance in different use cases.

Additional Benefits:

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

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