

Automotive LED Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Automotive LED Lighting Market size is estimated at 9.31 billion USD in 2025, and is expected to reach 14.34 billion USD by 2030, growing at a CAGR of 9.02% during the forecast period (2025-2030).

The rising accident rates, growing demand for EVs, and supportive government policies drive the market's growth

- In terms of value share, in 2022, headlights accounted for most of the market share (51.8%), followed by others (miniature LED lights, LED license plate lights, fog Lights, and interior LED lights), directional signal lights (DSLs), day time running lights, and stop lights. The headlights segment is expected to gain a higher market share in the future. Along with the rising number of accidents, the penetration rate of fog LED lamps and headlamps is anticipated to rise. Approximately 1.3 million people die each year as a result of road traffic crashes globally.
- In terms of volume share, in 2023, DSLs accounted for most of the market share (27.9%), followed by headlights (17.7%), others (miniature LED lights, LED license plate lights, fog Lights, and interior LED lights) (16.4%), and stop lights. The market share is expected to remain the same for all the segments during the forecast period, with a slight reduction in the others and stop lights segment and an increase in the DSLs and headlights segments. External lights (primarily signal lights) are highly likely to be affected in minor to major accidents in all types of vehicles and require replacement.
- EVs are one of the primary drivers for the surging demand for automotive LEDs globally. China led the EV market, accounting for 60% of global electric car sales in 2022, followed by Europe and the United States, which saw strong sales growth of 15% and 55%, respectively.
- The ambitious policy programs in major economies, such as the Fit for 55 package in the European Union and the Inflation Reduction Act in the United States, are expected to boost the market share of EVs. Key players in the market are also focusing on

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expanding their EV plants in developed nations.

Growth in EVs, autonomous vehicles, and government incentives are expected to boost the adoption of LED lights in the automotive industry

- In terms of value share, the Asia-Pacific automotive LED lighting market accounted for the majority share in 2022, followed by North America and Europe, respectively. The market share is expected to increase for Asia-Pacific in 2029, as most of the six Asian countries, such as China, Japan, Thailand, Taiwan, Malaysia, and India, have introduced incentives such as protecting their domestic markets and giving preferential treatment to automakers in promoting their automobile industries.
- In terms of volume share, the Asia-Pacific automotive LED lighting market accounted for the majority share in 2022, followed by Europe and North America. In Europe, the rise of electric vehicles and technological advances in the types of fuels used in vehicles are transforming the region's automotive industry. Sales of battery electric vehicles in the European Union are still growing rapidly. For example, 12.1% of the 9.1 million cars sold on the EU market in 2022 were pure battery electric vehicles. By contrast, in 2019, this share was just 1.9%, and in 2021 it was 9.1%.
- Electrification is the most significant transformation the industry is undergoing worldwide. Another trend rising is autonomous vehicles. It is important to note that technology contributes to auto companies' carbon-neutral goals. The Middle East is an important market for Nissan. Many modern vehicles are getting smarter and more connected. It will be equipped with intelligent mobility and autonomous driving, similar to the Nissan Ariya. Such transformations are undertaken in other parts of the region. Thus, growth in the regional automotive segment may increase the penetration of LEDs in the market.

Global Automotive LED Lighting Market Trends

The increasing demand for EVs is anticipated to raise the market value

- The total automobile production globally was 143.96 million units in 2022, and it was expected to reach 150.92 million units in 2023. The gathered data indicated a 16% reduction in the manufacturing of automotive cars in 2020, following a dismal 2019, which already showed a noticeable decline of roughly 5% in global auto output. The average decline across all of Europe was more than 21%. Sharp decreases in all major producing nations ranged from 11% to roughly 40%. Manufacturing in Europe accounted for roughly 22% of the total production. Vehicle manufacturing in the Americas accounted for 20% of global production in 2020. The African continent had a severe decrease of more than 35% in manufacturing. Asia, on the other hand, held up very well, with a decline of only 10%. According to the numbers provided, the COVID-19 pandemic had a tremendous impact on the automotive industry, which decreased the demand for LEDs.
- Volkswagen Group, Stellantis, Mercedes-Benz, BMW, Porsche, Hertz, GM, Audi, TATA Motors, Mahindra & Mahindra, SAIC Motor, Hyundai Motor Company, Kia Corporation, MG Mobility, and Renault Korea Motors are the major automotive manufacturing companies globally. In 2022, there were more than 10 million electric vehicle sales worldwide, and the sales in 2023 were anticipated to increase by another 35% to a total of 14 million. Due to this rapid expansion, the market share of electric automobiles increased from 4% in 2020 to 14% in 2022. In addition, as more electric vehicles are being used, there is a rising demand for automotive semiconductor chips because they require more processors per vehicle than conventional cars. The market for LED lighting is expected to benefit from the increase in semiconductor demand in the automobile industry.

The increasing number of battery swapping stations and battery recycling service outlets and the rising demand for EVs are

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expected to drive the growth of the market

- The EV markets are expanding at an exponential rate, with sales exceeding 10 million in 2022. In 2022, electric vehicles accounted for 14% of all new vehicle sales, up from roughly 9% in 2021 and less than 5% in 2020. Global sales were led by three markets. China was the leader, accounting for almost 60% of global electric vehicle sales. China accounts for more than half of all the electric vehicles on the road worldwide, and the government has already exceeded its 2025 target for new energy vehicle sales.
- By 2022, China had 1,973 battery swapping stations, including 675 built in 2022 and over 10,000 power battery recycling service outlets. Thus, the rapid growth of charging facilities indicates the booming new energy vehicle (NEV) sector in the country. In October 2022, the German government unveiled plans to boost charging infrastructure for electric vehicles. The plan consisted of a EUR 6.3 billion (USD 6.17 billion) proposal that would increase the number of charging points across the country to 1 million by 2030.
- In major markets, electric car sales were normally low in 2022, but it was a growth year in India, Thailand, and Indonesia. Sales of electric vehicles in these countries more than tripled since 2021, reaching 80,000 units. In the United States, the Inflation Reduction Act (IRA), combined with a number of states adopting California's Advanced Clean Cars II rule, is likely to produce a 50% market share for electric cars in 2030, in line with the national target. Considering the abovementioned instances, key manufacturers across the world are expected to invest more in developing and producing automotive LEDs.

Automotive LED Lighting Industry Overview

The Automotive LED Lighting Market is moderately consolidated, with the top five companies occupying 51.31%. The major players in this market are HELLA GmbH & Co. KGaA (FORVIA), KOITO MANUFACTURING CO., LTD., Marelli Holdings Co., Ltd., OSRAM GmbH. and Stanley Electric Co., Ltd. (sorted alphabetically).

Additional Benefits:

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

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