

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

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Report description:

The China Automotive LED Lighting Market size is estimated at 2.02 billion USD in 2025, and is expected to reach 3.77 billion USD by 2030, growing at a CAGR of 13.28% during the forecast period (2025-2030).

The use of LED lights in automobiles has resulted in a decrease in the number of accidents

- In 2023, headlights accounted for the majority of value share in the Chinese automobile lighting market, followed by others and directional signal lights. During the forecast period, the market share for directional signal lights and stoplights is expected to remain the same, with a slight decrease in headlights. An emerging trend in the market is the combination of DRLs (daytime running lamps) with projector lights in frontal illumination, which is being incorporated into forthcoming vehicles by notable manufacturers such as SAIC and Geely. The rising trend of accidents has also led to an anticipated increase in the penetration rate of fog LED lamps. In 2019, there were 256,101 injuries and 62,763 fatalities in traffic accidents in China, which has significantly increased since 2016.
- In terms of volume share, directional signal lights accounted for the majority in 2022, followed by headlights and others. The market share for these lights is expected to remain relatively stable with less fluctuation. In all types of vehicles, directional signal lights are the main component that has a high probability of getting affected in minor to major accidents and require replacement.
- The Chinese automobile market is highly competitive, with Chinese NEV (New Electric Vehicle) start-ups such as NIO, XPeng, and Li Auto vying for market share alongside established automakers such as BYD, SAIC Motors, Geely, BMW, and Mercedes-Benz. The quest for electric vehicles has also attracted tech giants such as Xiaomi and Baidu. Thus, the growth in NEV would increase the penetration of LED in the market.

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China Automotive LED Lighting Market Trends

Growing innovation in automotive LED light in the Asia-Pacific region will boost the overall LED market

- The total automobile vehicle production in China was 46.68 million units in 2022, and it is expected to reach 49.49 million units in 2023. The automotive supply industry in China was severely affected by COVID-19. Maritime transportation was negatively impacted, and critical automotive parts were no longer sent in large quantities of containers to Europe, mainly because of a substantial decline in demand brought on by the closure of plants and assembly lines. Thus, the fleets of container carriers and producers on trade routes decreased by 30%. This disruption in automotive parts negatively impacted LED lights used in automobiles.
- SAIC Motor, Geely, Great Wall Motor, Chery, FAW Group, and other companies are among the nation's top automakers. One prominent business, SAIC Motor, is making significant investments in artificial intelligence (AI) technology, smart fuel cells, and intelligent interconnection for use in automobiles. The use of LEDs as a connected technology in vehicles is anticipated to increase due to this progress.
- Due to LED lights' environmental friendliness and innate energy efficiency, they are currently seen as a natural choice in automotive applications. They help create innovative lighting concepts that enhance a vehicle's looks. Companies are working together to develop technological LED products for the automobile industry. For instance, ams OSRAM and TactoTek collaborated to create a demonstrator in September 2022 that featured an avant-garde RGB side-looker LED OSIRE E5515. It can be easily incorporated into the interior of a car to create a more compact design. Such innovations and future investments in automotive LED lights will drive the market during the forecast period.

Growing demand for EVs drives the market growth

- Despite the COVID-19 pandemic and the ensuing supply chain constraints, the electric vehicle (EV) market has grown significantly in China. EV sales are continuing to increase rapidly despite recent obstacles and rising production costs due to rising raw material prices. China had around 1.6 million EV charging stations and 5.21 million charging points at the end of 2022, including over 2.59 million built in 2022. Furthermore, by 2022, the country had 1,973 battery swapping stations, including 675 built in 2022, adding that China has over 10,000 power battery recycling service outlets. Thus, the rapid growth in charging facilities indicates the booming new energy vehicle (NEV) sector in the country.
- China is set to extend EV tax incentives as sales growth slows. The purchase tax break for EVs and plug-in hybrids costs less than CNY 300,000 (USD 42062.76) (CNY 195,000 (USD 27340.03)). Vehicles over that amount are broadly classed as luxury vehicles in China, making it easier for people to buy more affordable, clean cars. These factors would boost the nation's EV adoption rate and further its goal of reaching net zero emissions by 2060.
- In May 2023, Rogers announced the construction of a new factory in China to produce its power substrates to serve both its local and international clients better and to meet the rising demand for power substrates used in electric and hybrid electric vehicles (EVs/HEVs) and renewable energy applications. The expansion's first phase is expected to be finished in 2025. Automobile manufacturers are racing to develop and produce new energy vehicles because of the growing demand for EVs, which

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boosts the demand for automotive LEDs. LED car lights can help EVs save energy and extend their driving range, as they consume less power than halogen bulbs.

China Automotive LED Lighting Industry Overview

The China Automotive LED Lighting Market is fragmented, with the top five companies occupying 35.95%. The major players in this market are HELLA GmbH & Co. KGaA (FORVIA), KOITO MANUFACTURING CO., LTD., OSRAM GmbH., Stanley Electric Co., Ltd. and Valeo (sorted alphabetically).

Additional Benefits:

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

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