

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

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Report description:

The Europe Indoor LED Lighting Market size is estimated at 6.37 billion USD in 2025, and is expected to reach 8.65 billion USD by 2030, growing at a CAGR of 6.29% during the forecast period (2025-2030).

Increasing development in the industrial and residential sectors drives market growth

- In terms of value, as of 2023, industrial and warehouse had a major share, followed by commercial, residential, and agricultural lighting. France, Russia, and Poland had the majority of warehouse constructions. The COVID-19 crisis accelerated France's efforts to return industrial production capacities to the pre-pandemic levels. French industrial production increased by 1.1% over one month in December 2022, after +2% in November 2022. Poland has close to 4.4 million sq. m of space. By the middle of 2022, almost 4.5 million sq. m of warehouse and industrial space was under construction in Poland.
- In commercial, hospitals, schools, and airports comprise the majority of the share. The disposable net income among the 42 countries surveyed varies significantly. Liechtenstein, Switzerland, and Luxembourg have the highest disposable net income by a wide margin, which means more affordability for schools and college studies.
- In terms of volume, as of 2023, the residential sector had a major share. Italy's housing market remains stable, supported by strong demand. In Q4 2021, residential property transactions increased by 14.1% to 263,795 units compared to a year earlier. All regions saw a strong sales increase during the period. Despite many businesses remaining in transition, office usage rates continued on an upward trend from the end of the last lockdown in January 2022. As of Q3 2022, the office sector traded at an average discount of 26%, which was below the 31% overall average. The overall vacancy rate stood at 7.2% at the end of 2022, almost stable compared to the end of 2021 (+10bp). Overall, there is a positive trend toward a higher office and residential absorption rate, leading to a major increase in the demand for LEDs.

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Growing number of industrial production and surge in residential property drive the demand for market

- In terms of value and volume, as of 2023, the Rest of Europe held the major share, followed by France, Germany, and the United Kingdom. The Rest of Europe comprises Sweden, Italy, Spain, Russia, Poland, Netherlands, and others. Foreign buyers from the United States and northern Europe have been buying homes on Spain's southern coast. Despite a significant rise in mortgage rates, demand for real estate remained strong in 2022, with a 16% surge in transactions and an 11% uptick in mortgage production compared to 2021. In Europe, Poland was at the top with nearly 4.4 million sq. m of space. By the middle of 2022, almost 4.5 million sq. m of warehouse and industrial space was under construction in Poland. Overall, the demand for LEDs is expected to increase with increasing warehouse construction and a surge in residential property in the region.
- In the first eleven months of 2022, new dwellings authorized in France, excluding Mayotte, rose by 5.6% to 448,416 units compared to the same period the previous year, following an 18.5% increase during 2021. Since COVID-19 confinements, many people have moved from the major cities to the provinces in France. Overall, the residential market is expected to be more stable in the coming years.
- In Germany, with around 60% of total R&D expenditure, German industrial companies significantly contribute to the country's prosperity. Companies also engage in strategic development. For instance, in 2023, Osvetleni Cernocho SRO built a new production and storage hall to increase its industrial production capacity. Such expansions indicate an increase in the number of industries and storage areas and the use of LED lighting.

Europe Indoor LED Lighting Market Trends

Increasing disposable income and government incentives may lead to more LED penetration

- In 2022, 198 million households resided in the EU, with 2.2 members per household on average. The region's population was 746.2 million in 2020, which reduced to 742.2 million by 2023. Homeownership rates in the EU declined by 69.10% in 2022 from 69.90% in 2021. Such instances suggest that housing development projects are less than in previous years despite a slight decline in the number of households. Thus, LED penetration is expected to grow positively but less in the residential segment compared to previous years.
- In Europe, disposable income is high for most countries, resulting in rising spending power of individuals, especially on new residential spaces. The United Kingdom's per capita income reached USD 33,138 in 2022, while that of France reached USD 25,337.7.
- In Europe, the governments provide incentive programs to create more LED penetration. The UK government announced the launch of a new energy-efficient lighting proposal. Under this, lighting, such as low energy-use LEDs, would replace old halogen bulbs. Such initiatives could save households between GBP 2,000 and GBP 3,000 over the lifetime of these bulbs. The "Federal Funding for Efficient Buildings" program was launched in January 2021 in Germany. Anyone who owns a property in Germany or who is looking to buy property in the country can apply for the funding. The energy efficiency program also includes lighting energy efficiency buildings. In June 2017, the French government announced the Energy Savings Certificate scheme, which allows people to get subsidies that can cover up to 100% of the price of LED bulbs based on the householder's income. Such instances are expected to boost the demand for LED lighting in the region during the forecast period.

Government programs and the prohibition of the sale of halogen bulbs may drive the growth of LED lighting

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- One of the main energy consumers in the EU, the industry sector accounted for 25.6% of total energy consumption in 2021, followed by the household and commercial sectors, which used the most energy. A significant number of households are converting to smart home technologies, which has increased the demand for lighting control in indoor spaces, such as residential buildings, at unexpected rates. The central feature of the European Green Deal, which was unveiled in September 2020, is the Housing Renovation Program, which was implemented by the EU administration. Such programs are assisting the expansion of LED lighting in the region.
- The demand for electricity in the commercial sector tends to be around 8-10 hours, while electricity use in the industrial sector does not fluctuate throughout the day or year. Electricity demand in the residential sector varies for about 7-9 hours. The Covenant of Mayors - Demonstration Projects scheme refurbished 27 roadways in Cantemir and installed 419 smart LED lighting. About 386 inefficient bulbs were replaced in Ocnita to lower the amount of CO2 released into the atmosphere, thus causing a rise in the use of LEDs in the region.
- In September 2018, the region also prohibited the sale of non-directional halogen bulbs. These legislative changes have made it easier for consumers to progressively switch from conventional lighting to LED technology. The governments in the region are also phasing out older, less efficient technologies to boost consumer acceptance of LED items, as well as giving subsidies and incentives to enhance the overall efficiency of LEDs in the region.

Europe Indoor LED Lighting Industry Overview

The Europe Indoor LED Lighting Market is fragmented, with the top five companies occupying 37.37%. The major players in this market are ams-OSRAM AG, LEDVANCE GmbH (MLS Co Ltd), Panasonic Holdings Corporation, Signify (Philips) and Thorn Lighting Ltd. (Zumtobel Group) (sorted alphabetically).

Additional Benefits:

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

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