

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

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Report description:

The Europe Outdoor LED Lighting Market size is estimated at 2.57 billion USD in 2025, and is expected to reach 3.41 billion USD by 2030, growing at a CAGR of 5.81% during the forecast period (2025-2030).

Increasing use of LED lighting in amusement parks and parking lots and government regulations to ban traditional lamps will drive the growth of the LED lighting market

- In terms of value and volume, public spaces will account for the largest share in 2023, followed by roads and trails. Public places such as stadiums, pools, beaches, and forts were closed across the region to contain the spread of COVID-19. Europe relaxed the COVID-related rules in 2021. With the opening of buildings, the LED lighting market is also growing steadily. New amusement parks, such as Funtasy World Rodental in Germany and Pushkin Theme Park in Russia, will open in 2023. These developments will have a positive impact on the LED lighting market.

- With the emergence of retail outlets in the area, the demand for parking has increased. For example, IKEA bought the former Topshop flagship store on Oxford Street for GBP 378 million. IKEA plans to open its first store in the same building in 2023, specializing in household items such as lamps and curtains. Such instances in the market are expected to lead to increased demand for LED retail lighting products in the region. These developments will increase the number of public spaces, such as private parking spaces, and the use of LED lighting.

- A major factor driving the demand for LED products in Europe is the European Union's policy of banning the sale of inefficient lighting technologies. In 2009, Europe phased out the use of incandescent light bulbs. Directional halogen lamps were also discontinued in 2016. In September 2018, the region banned the sale of non-directional halogen lamps. These policies have facilitated the gradual replacement of traditional lighting products by consumers with those based on LED technology.

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Upgradation and renovation of stadiums, rising rail infrastructure, and use of street lights to drive the growth of the LED lighting market

- In terms of value and volume, the Rest of Europe occupied a major share in 2023, followed by the United Kingdom, France, and Germany. The market share is expected to be a small reduction in the Rest of Europe and gain in other remaining countries in coming years.
- Countries such as Spain, Barcelona, and Valencia are working to develop new stadiums and refurbish historical buildings in their countries. For example, Barcelona has secured EUR 1.45 billion (USD 1.6 billion) from multiple investors to begin construction of its Camp Nou stadium in 2023. Brussels planned to invest EUR 6 million (USD 6.5 million) in 2022. UEFA Euro 2024, EuroBasket 2025, and other events are some of the upcoming sporting events in Europe. Therefore, the renovation and construction of new stadiums and the increase in sports tournaments are expected to boost sales of LED lighting in the country.
- The smart building initiatives and falling average LED prices are also key drivers of LED demand. LEDs for building and street lighting have already been tested in German cities. In June 2023, a new phase of the Ukrainian government's program planned to replace old light bulbs. Since the program was launched in January 2023, millions of Ukrainian citizens have taken advantage of the opportunity to receive the latest light bulbs for free. In addition, investments in road network infrastructure are important for a variety of social, economic, and mobility-related reasons. On average, most European countries spend about 0.8% to 1.2% of their annual GDP on road networks. For example, in 2015, Austria implemented a program of investment in the Austrian motorway network.

Europe Outdoor LED Lighting Market Trends

Upgradation, replacement, and construction of new stadiums will drive the growth of LED lights

- The number of stadiums is expected to witness growth from 1,700 units in 2022 to 1,760 units in 2029, exhibiting a CAGR of 0.5%. The sports sector has undergone several changes in recent years. For instance, London Stadium and Musco collaborated in 2020 to upgrade the lighting system and install LED lights. The Aviva Stadium in Dublin had spectacular lighting effects by 2020. Red, green, blue, and white (RGBW) LED fixtures with 52 color-changing options make up the recently installed system. The stadium at Ciutat de Valencia underwent renovation in 2020, and LED floodlights were added. Six stadiums in Europe got new lighting by Signify in 2021. These elements support the expansion of the LED market in the area.
- European clubs set aside more than EUR 2.5 billion (USD 2.69 billion) for facility renovations. Valencia, Spain, which committed EUR 300 million (USD 323.77 million) to constructing the Nou Mestalla stadium in 2022, made the second-most expensive investment. With UEFA's assistance, the Football Association of Serbia (FSS) invested more than EUR 20 million (USD 21.58 million) in 2023 to upgrade a number of the nation's stadiums. Barcelona obtained EUR 1.45 billion (USD 1.6 billion) in financing from several investors to start building the Camp Nou stadium in 2023. Brussels invested EUR 6 million (USD 6.47 million) in building a major stadium in 2022. UEFA Euro 2024, EuroBasket 2025, and other events are a few of the upcoming sporting occasions in Europe. Thus, the renovation and construction of new stadiums and an increase in sporting tournaments are expected to increase sales of LED lights in the country.

Increasing residential housing and non-residential buildings may drive the growth of LED lights

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- In 2022, Europe had 743.5 million people. The Member States of the European Union contains over 131 million structures. The European Union has 119 million residential buildings and 12 million non-residential buildings. In 2022, the demand for housing remained high, encouraging the building of new homes in the region, thus benefitting the local LED market.
- There were 197.4 million households in 2021 as opposed to 196.0 million in 2020. In the EU, 49.4% of households had a single child in 2021, followed by 38.6% with two children and 12% with three or more. About 70% of EU citizens were homeowners in 2020. In 2019, European homes had 1.6 rooms per person on average. The use of LEDs in homes and business spaces may increase as the population and the number of households rise.
- As of 2019, there were 242.7 million cars on the road in the European Union, an increase of 1.8% from the previous year, and more than 28 million vans on the road. France has by far the largest fleet of vans, with six million vehicles, followed by Italy (4.2 million), Spain (3.8 million), and Germany (2.8 million). EU roadways have 6.2 million medium and heavy commercial vehicles. Even though registrations have gone up recently, only 4.6% of all EU vehicles are alternatively powered. Hybrid electric vehicles make up 0.8% of all vehicles on EU roads, while battery-electric and plug-in hybrid vehicles each account for only 0.2% of the total. The increase in automotive vehicle sales may positively impact LED sales in the region.

Europe Outdoor LED Lighting Industry Overview

The Europe Outdoor LED Lighting Market is fragmented, with the top five companies occupying 39.24%. The major players in this market are ams-OSRAM AG, LEDVANCE GmbH (MLS Co Ltd), Panasonic Holdings Corporation, Signify Holding (Philips) and Thorn Lighting Ltd. (Zumtobel Group) (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Population

4.2 Per Capita Income

4.3 Total Import Of Leds

4.4 Lighting Electricity Consumption

4.5 # Of Households

4.6 Led Penetration

4.7 # Of Stadiums

4.8 Regulatory Framework

4.8.1 France

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- 4.8.2 Germany
- 4.8.3 United Kingdom
- 4.9 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2030 and analysis of growth prospects)

- 5.1 Outdoor Lighting
 - 5.1.1 Public Places
 - 5.1.2 Streets and Roadways
 - 5.1.3 Others
- 5.2 Country
 - 5.2.1 France
 - 5.2.2 Germany
 - 5.2.3 United Kingdom
 - 5.2.4 Rest of Europe

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)
 - 6.4.1 ACUITY BRANDS, INC.
 - 6.4.2 ams-OSRAM AG
 - 6.4.3 Dialight PLC
 - 6.4.4 EGLO Leuchten GmbH
 - 6.4.5 LEDVANCE GmbH (MLS Co Ltd)
 - 6.4.6 Panasonic Holdings Corporation
 - 6.4.7 Signify Holding (Philips)
 - 6.4.8 Thorlux Lighting (FW Thorpe Plc)
 - 6.4.9 Thorn Lighting Ltd. (Zumtobel Group)
 - 6.4.10 TRILUX GmbH & Co. KG

7 KEY STRATEGIC QUESTIONS FOR LED CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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