

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

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### **Report description:**

The France Indoor LED Lighting Market size is estimated at 1.37 billion USD in 2025, and is expected to reach 2.06 billion USD by 2030, growing at a CAGR of 8.60% during the forecast period (2025-2030).

Increasing developments in the industrial and residential segments, along with FDI flows in the commercial office segment, driving the market's growth

- In terms of value share, in 2023, industrial and warehouse accounted for the majority share among indoor lighting segments. The COVID-19 pandemic seems to have accelerated France's efforts to return industrial production capacities to the country. French industrial production increased by 1.1% over one month in December 2022, after +2% in November 2022. Manufacturing output rose by 0.3% M-o-M in December 2022, after +2.4% in November 2022. While the market in this segment is saturating in terms of LED demand, the growth in the segment with an increasing number of warehouses is expected to continue boosting the demand.
- In terms of volume, in 2023, residential accounted for the highest share. Residential construction activity has been showing mixed results in recent years. In the first 11 months of 2022, new dwellings authorized in France, excluding Mayotte, rose by 5.6% Y-o-Y to 448,416 units, following an 18.5% Y-o-Y increase in 2021. During 2023, house prices in France were expected to stabilize a bit (perhaps growth would drop below 5%), and the number of property sales would remain just above 1 million during the year. Since the COVID-19 pandemic-induced confinements, many people have moved from the major cities to the provinces in France. The market in the residential indoor lighting segment is expected to get more stable over the coming years.
- The office segment's share was expected to increase from 2023 after declining during the pandemic due to WFH conditions and low development and sales. After dropping due to the COVID-19 pandemic, FDI flows to France rebounded in 2021 (+191.4%) but

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remained below pre-crisis levels. In 2022, FDI projects increased by 3% (1,259 projects) in France. Rebound sales in the office segment are expected to increase demand for LEDs.

## France Indoor LED Lighting Market Trends

### High per capita income and energy saving scheme to promote use of LED lights

- The average household size is 2.2 people per household in France in 2022. The current population of France is 65.7 million as of June 2023, increasing at a slow pace of around 0.2% yearly. 81.5 % of the population is urban (53.2 million people in 2020). Thus, the increase in population is expected to create more LED penetration and increase the need for illumination in the country.
- Between 2017 and 2020, the homeownership rate in Germany decreased slightly. In 2021, about 64.7% of the population lived in an owner-occupied dwelling, and in 2022, it reached 63.4%. This makes France one of the countries with the highest homeownership rate, but in coming years, it is expected to decline slowly, and the lowest rental residential real estate market is expected to grow further in the country. These instances suggest that LED penetration is there, but the penetration is less compared to previous years in the residential segment.
- In France, disposable income is high, which results in the rising spending power of individuals and affording more money on new residential spaces. France's per Capita income reached USD 25,337.71 in December 2022, compared to USD 27,184.2 in December 2021. Compared to some developed nations, it has high purchasing power. For instance, Brazil had USD 7732.4 as of 2021, and Italy had USD 15,321.9 as of 2017, which is lower.
- 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 further expected to surge the demand for LED lighting in the country.

### Energy renovation and energy efficient projects to drive the growth of the LED market

- The segment with the biggest final electricity usage was business and professionals (47%), followed by residential (almost 38%) and heavy industry (16%) in 2019. Consumer expenditure in the residential sector increased by almost 5% during the first lockdown as a result of people spending more time at home (remote or part-time employment, etc.). Furthermore, the energy renovation projects that were promoted by the "Ma PrimeRenov" program added to the French recovery plan were the main source of support for this activity. Consequently, the rise in construction indicates more houses and buildings to be built, thus increasing the demand for LED.
- Electricity demand in the commercial sector tends to be highest during operating business hours; it decreases substantially on nights and weekends. Usually, in a day, it is around 8-10 hours. Electricity use in the industrial sector tends not to fluctuate through the day or year as in the residential and commercial sectors, particularly at manufacturing facilities that operate around the clock, i.e., 24 hours. Electricity demand in the residential sector varies for about 7 to 9 hours. Additionally, the government of Paris is aggressively replacing more than 2,500 LED-based streetlights in order to convert to green in 2017. The nation's market for LED lights is driven by such initiatives.
- Additionally, Citeos (VINCI Energies) supports more than 3,000 municipalities in enhancing their energy efficiency. For instance,

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Cergy-Pontoise, a city outside of Paris, has pledged to cut its energy use by 47% over 18 years by rehabilitating 80% of its buildings. By installing 7,000 more energy-efficient LED lights in place of the nation's existing lighting infrastructure, this project is fueling the growth of the LED light industry.

## France Indoor LED Lighting Industry Overview

The France Indoor LED Lighting Market is fragmented, with the top five companies occupying 23.66%. The major players in this market are ams-OSRAM AG, EGLO Leuchten GmbH, LEDVANCE GmbH (MLS Co Ltd), 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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