

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

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Report description:

The Germany Automotive LED Lighting Market size is estimated at 731.2 million USD in 2025, and is expected to reach 928.2 million USD by 2030, growing at a CAGR of 4.89% during the forecast period (2025-2030).

Government funding to LED chip manufacturers and the growing innovation in automotive LED lighting drive the market demand

- In terms of value share, in 2023, headlights accounted for the majority of the market, followed by other lights and directional signal lights. The market share is expected to remain the same for directional signal lights and stop lights during the forecast period. Automotive LED light manufacturers in the country are continuously innovating products for the growth of LED lights in the country. In October 2020, Osram was the first company to offer authorized LED-based automobile retrofit lighting in the German market. Since there have never been authorized LED replacement bulbs for headlight applications, this development was truly original.
- In terms of volume share, in 2023, directional signal lights accounted for the majority, followed by headlights and other lights. The market share is expected to remain the same with less to no fluctuation for all the lights in coming years. The top three automakers are Volkswagen, BMW, and Daimler, while Bosch, Schaffler, and ZF are among the top suppliers globally. The sector anticipates spending EUR 150 billion (USD 164.48 billion) over the next few years on digitalization, electric mobility and hydrogen technologies.
- Additionally, the German government offers funding to local manufacturers of LED chips. German officials are attempting to entice chipmakers to the nation by providing EUR 14 billion (USD 14.7 billion) in financial assistance. The action follows the European Commission's European Chips Act and Intel's decision in 2022 to establish a new manufacturing facility in Germany. Thus, the rising government support and increasing investment from automotive manufacturers to promote EV and overall vehicle

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production are expected to increase the use of LED lights in the automotive industry.

Germany Automotive LED Lighting Market Trends

Technological advancements by major automotive manufacturers and promising growth by EV industry to drive the growth of LED market

- The total automobile vehicle production in Germany was 3.53 million units in 2022, and it was expected to reach 3.63 million units in 2023. The COVID-19 pandemic had a significant effect on the German automotive market. The manufacturing lines of all German automobile OEMs were at a standstill due to the low global demand. The pandemic also caused suppliers, including Continental, Benteler, and Magna, to halt manufacturing briefly. Germany saw a 61% decline in car sales in April 2020. This shows that the overall drop in auto car manufacturing and the supply chain of automotive parts resulted in the decline in LED light usage in automotive vehicles.
- The country is home to some of the best automakers in the world, including Audi, Volkswagen, Mercedes-Benz, BMW, Porsche, and others. The major forces behind these manufacturers' success are technological advancements. Audi first saw the possibilities of using OLED technology in rear lights in May 2023 and has since worked to enhance its digitization. It is the only automaker that has deliberately and methodically developed this lighting technology to provide more lighting features to vehicles. These developments are the main forces behind the expansion of LED lights, generally in the automotive sector. Given that Germany is the center of the automobile sector, EVs have a promising future in this nation. At the start of 2023, according to the Federal Motor Transport Authority (KBA), there were about 48.8 million registered passenger automobiles in Germany. In addition, many car models are anticipated to cost the same by 2025, whether they have an internal combustion engine or not. The use of LEDs in automotive vehicles is expected to increase due to the enormous expansion in EVs.

Car registration and shift toward electric mobility through government initiatives to drive the growth of the LED market

- In 2022, the German electric car market grew by 132.2% in 2021, with 470,502 zero-emission passenger car registrations. Since 2020, when registrations increased from 1.75% to 6.65%, Germany has significantly shifted toward electric mobility. Electric automobiles accounted for 13.6% of the market in 2021 and 17.7% in 2022. In Germany, petrol and diesel automobiles accounted for half of all sales, a 12.1% decrease. In 2022, passenger auto registrations included Petrol (32.6%), Diesel (17.8%), BEV (17.7%), PHEV (13.7%), HEV (17.5%), and others (0.7%).
- The initiative, which took effect in July 2020, has played a significant role in persuading Germans to weigh in on the market share of electrified vehicles. Germany's new administration plans to hasten the transition to more electric vehicles on its roadways. The government announced that purchasing an electric car will continue to be subsidized for up to EUR 9,000 (USD 9706.36) in 2022. The assistance might be worth up to EUR 6,750 (USD 7279.77) for plug-in hybrid vehicles. In May 2022, Volkswagen launched a second German manufacturing plant dedicated to the production of electric vehicles, following the conversion of a facility in Emden that produces the all-electric ID.4.
- In October 2022, the German government unveiled plans to boost charging infrastructure for electric vehicles. The plan consists 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

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by 2030. Thus, the above instances lead to the development and production of new power stations because of the growing demand for EVs, which boosts the demand for automotive LEDs in the country.

Germany Automotive LED Lighting Industry Overview

The Germany Automotive LED Lighting Market is fairly consolidated, with the top five companies occupying 79.94%. The major players in this market are GRUPO ANTOLIN IRAUSA, S.A., HELLA GmbH & Co. KGaA (FORVIA), Marelli Holdings Co., Ltd., OSRAM GmbH. and Valeo (sorted alphabetically).

Additional Benefits:

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

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