

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

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Report description:

The Germany Outdoor LED Lighting Market size is estimated at 337.7 million USD in 2025, and is expected to reach 478.1 million USD by 2030, growing at a CAGR of 7.20% during the forecast period (2025-2030).

Smart city projects to drive the growth of LED lighting market

- By 2023, public spaces accounted for the largest share in terms of volume and value. To combat the COVID-19 pandemic, governments across Germany imposed additional and temporary closures of entertainment centers and parks, in addition to other travel restrictions. The impact of the novel coronavirus disease (COVID-19) caused countries to invest all their resources in combating the disease, which impacted public spending for government agencies to approve such projects. Lockdown restrictions were gradually eased in 2021, opening up public spaces, which boosted demand for parking near railway stations, shopping malls, and airports. The government also eased COVID-19 measures and participated in the creation of other initiatives to develop energy efficiency and sustainability. One of them was to reduce the use of halogen lamps and replace them with LED lighting.
- The ongoing transformation and infrastructure expansion projects are expected to increase the demand for LED outdoor lighting in the country, leading to the market's growth. Initiatives such as smart cities are expected to support the development of the outdoor LED lighting segment. For instance, in 2023, Signify helped the German municipality of Eichenzell become a sustainable smart city through the use of intelligent street lighting. The company's BrightSites solution brought high-speed wireless broadband connectivity to the community, enabling Eichenzell to address next-gen IoT applications and 5G densification in the future. The company installed LED lighting, which is managed by the Interact City system. Thus, such developments that include the use of LED lighting are increasing the market value of these lights in the country.

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Germany Outdoor LED Lighting Market Trends

Upgradation and construction of new stadiums are expected to drive the growth of LED lights

- The number of stadiums is expected to witness a growth from 123 units in 2022 to 130 units in 2029, recording a CAGR of 0.8%. The enormous need for stadium upgrades is the main factor driving the market. For instance, in 2014, the Allianz Arena in Munich was lit with over 300,000 LEDs. The stadium at RheinEnergieStadion in Cologne installed LED lighting in 2016. The year 2016 saw the installation of the Philips ArenaVision system for field illumination using an all-LED network at the Volkswagen Arena in Wolfsburg, Germany. The SIGNAL IDUNA PARK, the home stadium of Borussia Dortmund (BVB), received an LED illumination system in 2019 from The Zumtobel Group. The next UEFA EURO 2024, which has chosen the Dortmund stadium as one of 10 locations, will employ the new lighting system from the Group's Thorn brand. These factors support the expansion of the LED market in the region.
- The nation supports the building of stadiums and provides investment opportunities for different sports. For instance, work on the Jena stadium project began in 2021 and was expected to be finished by 2023. The Bochum Lohrheide Stadium is expected to be renovated by 2025. Additionally, the "Coronahilfen Profisport" initiative, which was introduced in response to the pandemic and intended to aid in the professional sports industry's rehabilitation after being severely impacted by the pandemic, had a total budget of EUR 200 million (GBP 180 million/USD 239 million) for 2021. Additionally, a program to aid in the development of sporting facilities in Germany received funding with a total of EUR 600 million (GBP 539 million/USD 718 million) in the funding round that started in February 2021. These factors drive the LED market in the country.

Increase in the number of household and government subsidies to increase EV sales and drive the growth of LED market

- In 2021, there were 83.24 million people living in Germany. When compared to the previous year, it went up by 0.08. The crude birth rate in Germany grew over the previous year by 0.3 live births per 1,000 people (+3.23%). The rate thus reached its peak during the observed period at 9.6 live births per 1,000 people. In Germany, there were 0.1 fewer infant deaths per 1,000 live births (-3.23%) than the year before. As a result, in 2021, Germany's infant mortality rate reached its all-time low of three fatalities per 1,000 live births. The rise in birth rates and decline in death rates encourage selling more homes, increasing the need for LED lighting.
- In 2021, Germany had 41.6 million households. In Germany, the number of households increased by 0.2% on an annual basis in 2021. The number of households increased by 3.2% between 2010 and 2021. There are now more one-person families than there were ten years ago. 16,619 German houses only had one person in 2021. As a result, Germany's demand for LED lighting will be aided by an increase in the number of households.
- In 2022, almost 3.4 million German automobiles were produced. This was an increase from the 3.1 million cars sold the year before. One of the foundations of the German economy is the auto sector. The German government also wants to speed up the transition to more electric vehicles on the road. Germany will increase electric vehicle sales by increasing the help-to-buy subsidy by EUR 9,000 (USD 9872.41). By 2030, the government wants 15 million all-electric vehicles on the road. The market's expansion will be facilitated by the plan to sell more cars in the upcoming years.

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Germany Outdoor LED Lighting Industry Overview

The Germany Outdoor LED Lighting Market is moderately consolidated, with the top five companies occupying 59.88%. The major players in this market are ams-OSRAM AG, Dialight PLC, LEDVANCE GmbH (MLS Co Ltd), 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

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