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

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Hazardous Location LED Lighting Market is expected to register a CAGR of 8.86% during the forecast period.

Key Highlights
- Factors such as the regulatory standards promoting the use of LED lightings and worker safety in hazardous locations, regulations that demand the usage halt of mercury vapor ballasts and metal halide activated lighting, demand for cost-effective lighting solutions, high service life, replacement of traditional lighting systems with LEDs are expected to drive the growth of the market during the forecast period.
- With the introduction of new solutions to illuminate the work area, players in the market are finding exciting opportunities for growth. For instance, Emerson introduced 'Appleton Rigmaster LED Linear Luminaire,' a new solution to quickly and safely illuminate land-based drilling rigs, for the oil and gas industry, in May 2019. This solution is expected to streamline the cumbersome and time-consuming task of installing and maintaining bright, energy-efficient lighting in hazardous areas on drilling rigs.
- Further, industries dealing with the processing of delicate particulate matter, fireworks, etc. and require maximum safety are deploying LED Lights for hazardous locations. This is expected to provide the market with growth opportunities in the future.
- With the introduction of reforms and initiatives such as the Energy Star Program, the United States has been at the forefront of LED adoption. The program mandates the lighting applications to adhere to industry standards such as IEC, NEC, and test procedures.
- Chemical industries were affected globally during the COVID-19 pandemic, leading to increased prices of LED lighting. For instance, Lumileds in April 2020, announced the increased prices for LED lights by 4% starting mid-April 2020 and attributed the same as a measure to offset costs it incurred during the coronavirus pandemic.

Hazardous Location LED Lighting Market Trends

Rising Demand for Cost-effective and Energy-efficient LED Lighting Solutions will Drive the Market Growth

- Governments and enterprises across the world are seeking numerous solutions for the reduction of energy consumption and running costs for lighting solutions. LED lighting solutions are technically advanced and efficient in terms of energy consumption, and luminous intensity, when compared to their counterparts, such as incandescent lamps.
- Greater life span (~100,000 hours), high luminous efficacy, decreasing average selling price (ASP), and reduced energy use are compelling industrial consumers to switch to LED technology. Given the high product lifetime, the consumers' spending on the replacement of these products is drastically reduced.
- Developed economies such as the United States are expected to observe 15%-32% of its energy usage by 2025 by deploying LED lighting systems. In the process, LED lighting could witness increased adoption amongst cloud-based connected controls, advanced electric motors and drives, high-efficiency boilers, modernization, and replacement of antiquated process equipment and others to foster energy cost reductions in the country.
- Energy-efficiency programs, namely the ENERGY STAR certification, Lighting Design Lab certification, and Duquesne Lighting Company (DLC) Industrial Energy Efficiency Program, are actively encouraging and promoting the use of lighting solutions that are energy-efficient, thereby helping organizations and households across the globe to reduce their carbon footprints.

North America to Account for Largest Share

- The industrial and manufacturing industry accounts for 32% of the United States energy usage, while also representing largest energy cost reduction opportunities in the US. Therefore the LED lighting systems provide a potential to cost-effectively eliminate 15% - 32% of its energy usage by 2025.
- Further to ensure that lighting fixtures are appropriately used within such settings, both U.S based National Electric Code (NEC) and the Canadian-based CEC, mandated standards to classify risk levels for hazardous location lighting.
- Vendors in the region are also observed to have increasingly participated in multiple launches to upgrade the existing LED lighting offerings for hazardous locations. For instance, in May 2019, Emerson introduced a solution for the oil and gas industry for illumination of land-based drilling rigs. The Appleton Rigmaster LED linear luminaire maintains a bright and energy-efficient lighting in hazardous areas on drilling rigs.

Hazardous Location LED Lighting Industry Overview

The hazardous location LED lighting market is fragmented owing to the presence of several players in the market that are investing in R&D and innovating new products in the lighting industry. Key players in the market are DCD Technologies ME FZCO, Nemalux Inc., Luceco Middle East FZCO, among others.

- June 2019 - Crouse-Hinds series CEAG ExLin linear LEDs, by Eaton were certified for zone 1 and 2 hazardous area environments. The explosion-protected LED fixture offered its industrial clients with more cost-effective lighting in comparison to the traditional fluorescent fixtures.
- May 2019 - Emerson introduced a new solution for the oil and gas industry to easily and safely illuminate land-based drilling rigs. The Appleton linear luminaire, streamlines the cumbersome and time-consuming task of installing and maintaining bright,

energy-efficient lighting in hazardous areas on drilling rigs. The Appleton Rigmaster solves these challenges by integrating LED technology into a lightweight, low-profile package that performs durably, is resistant to harsh conditions and damaging vibrations, yet allows faster, safer installations throughout the drilling rig.

Additional Benefits:

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

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