

## **North America Automotive LED Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The North America Automotive LED Lighting Market size is estimated at 2.18 billion USD in 2025, and is expected to reach 3.04 billion USD by 2030, growing at a CAGR of 6.84% during the forecast period (2025-2030).

Rising accident trend, penetration rate of fog LED lamps, and increasing sales of electric vehicles drive market growth

- In terms of value, in 2022, headlights accounted for a major share, followed by others (miniature LED lights, LED license plate lights, fog lights, and interior LED lights), directional signal lights (DSLs), daytime running lights, and stop lights. The market share is expected to remain the same for all lights, with a small reduction in others and DSLs, and grow for headlights. With the rising accident trend, the penetration rate of fog LED lamps is anticipated to rise. In the US, the number of motor vehicle deaths reached an estimated 46,000 in 2022 compared to the pre-pandemic death rate, an increase of nearly 22%.
- In terms of volume, in 2022, directional signal lights accounted for a major share, followed by headlights, others (miniature LED lights, LED license plate lights, fog lights, and interior LED lights), and stop lights. External lights are the prime parts that have a high probability of getting affected in minor to major accidents in all types of vehicles and require replacement.
- The year 2022 ended with new light-vehicle sales reaching 13.7 million units. The Y-o-Y 2022 sales decreased by 8.2% compared to 2021, with the decrease primarily attributed to the ongoing microchip shortage and additional supply chain disruptions. With sales of hybrid, plug-in hybrid, and battery electric vehicles (BEVs) accounting for 12.3% of all new vehicle sales in 2022, an increase of 2.7% from 2021, alternative fuel vehicles gained market share. Thus, the increase in vehicle sales resulted in an increase in the requirement for LED lights.

Adoption of EVs across countries and favorable laws to develop local automotive industry drive the demand for LED lighting

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- In terms of value, in 2022, the US LED light market accounted for the majority of the share, followed by the Rest of North America (RONA). The market share is expected to decline for the US and increase for the Rest of North America, with less fluctuation in the coming years. The domestic vehicle production in the US increased from 9.1 million units in 2021 to 10.06 million units in 2022. The vehicle production includes cars and commercial vehicles. In Canada, in 2022, vehicle production increased by 10.2% compared to 2021, accounting for 1.2 million units. The increase in domestic vehicle production creates more demand for automotive LEDs in the market.
- The demand for EVs grew across many countries in North America. Mexico saw 1.08 million new car sales in 2022, a 7% improvement from 2021, and US EV sales increased by 65% in 2022.
- In sub-sectors of the automotive industry, the US and Mexican commercial services experienced strong opportunities in OE parts, aftermarket, and electric vehicle (EV) parts. The value of Mexican automotive parts for OEMs and aftermarket production increased from USD 78.4 billion in 2020 to USD 94.7 billion in 2021, and it is expected to reach more than USD 101 billion by 2022.
- The United States, Mexico, Canada Agreement (USMCA) went into effect on July 1, 2020. The USMCA requirement stated that 75% of a vehicle's content must be produced in North America and that core auto parts originate from the United States, Canada, or Mexico. Considering the above-mentioned factors, such as the adoption of EVs and favorable laws to develop the local automotive industry, the growth of LEDs is expected across North America in the coming years.

#### North America Automotive LED Lighting Market Trends

The LED market is driven by investments by EVs and battery producers to increase automotive production

- The total automobile vehicle production in North America was 14.54 million units in 2022, and it is expected to reach 15.06 million units in 2023. One of the biggest manufacturing sectors in North America is the automotive sector. However, the COVID-19 pandemic caused two significant shocks to the region's automobile industry, which had a significant negative impact on production, sales, and foreign trade in 2020 and 2021. Thus, the disruption in the supply chain and production of automotive vehicles negatively affected the LED lighting business in the region.
- March saw an almost 31% year-over-year fall in the US light car production. Only one plant was operating for one week at the end of April, so there needed to be a higher level of light vehicle production. The auto industry also voiced concerns regarding its supply networks. ZF, a German supplier, has facilities in the United States and revealed plans to reduce its global employment by 10% by the end of May 2020. Several worldwide supply chain disruptions impacted manufacturing in the United States: Mercedes-Benz resumed its Vance, Alabama, facility on April 27; however, due to a scarcity of parts, production had to be briefly halted on May 15. This disruption created a downfall in semiconductors used in the automotive industry.
- Further, the demand for EVs is rapidly increasing in North America due to government initiatives. The Inflation Reduction Act was passed in August 2022, and between that time and March 2023, major EV and battery producers announced investments in North American EV supply chains worth at least USD 52 billion. Such initiatives in the interest of consumers and manufacturers will boost the LED lighting business in the region.

Government investments to drive the sales of electric vehicle and propel the growth of LED lighting

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- Most of the EV sales in the North American region come from the US, Canada, and Mexico. In 2022, US BEV sales increased by 65% compared to 2021, and Tesla continues to dominate the EV market. In 2022, Mexico sales were only 0.5% of 1,090,000 total vehicle sales were fully electric, a percentage that falls well below other markets, such as China, Europe, and the United States. In Canada, during Q4 2022, battery electric vehicles (BEVs) alone had 27,754 new registrations, and plug-in hybrid electric vehicles (PHEVs) had 5,645 new registrations.
- To expand further, the US government issued a trillion-dollar infrastructure bill in 2021 that allocates USD 7.5 billion toward building 500,000 more public EV chargers by 2030 and also made investments in EV manufacturing by providing tax benefits of USD 7,500 for purchasing an EV assembled in the US. Also, Tesla, one of the significant players in EVs, committed to delivering around 3,500 of its US Supercharger stations and 4,000 Level 2 charging docks available to all brands of electric vehicles by the end of 2024.
- GM Canada invested more than USD 2 billion in Canada to transform manufacturing facilities in Ingersoll and Oshawa and expects electric vehicle production by the end of 2022. By 2030, Georgia, Kentucky, and Michigan are expected to dominate electric vehicle battery manufacturing in the United States. This EV battery manufacturing capacity will facilitate the production of 10 to 13 million batteries for all-electric vehicles per year, positioning the United States as a global EV competitor. 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 region.

## North America Automotive LED Lighting Industry Overview

The North America Automotive LED Lighting Market is moderately consolidated, with the top five companies occupying 52.69%. The major players in this market are GRUPO ANTOLIN IRAUSA, S.A., KOITO MANUFACTURING CO., LTD., Marelli Holdings Co., Ltd., OSRAM GmbH. and Stanley Electric Co., Ltd. (sorted alphabetically).

### Additional Benefits:

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

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