

North America LED Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America LED Packaging Market is expected to register a CAGR of 7.28% during the forecast period.

Key Highlights

- The growing popularity of LEDs would also contribute to the introduction of intelligent lighting (connected lighting) systems in industries. As, the versatility of the LEDs, the powered devices are more likely to benefit from the use of LEDs than conventional light sources in terms of color variability and brightness.
- Further, the growing demand for energy-efficient lighting systems, declining prices of LED products, and stringent government regulations are some of the major factors driving the adoption of LED lighting in North America and is also expected to drive the LED packaging market in the forecast period. For instance, according to the US Department of Energy, the price of cool white LED lamps in the United States was USD 0.88 per Kilolumen and is forecasted to drop to USD 0.3 Kilolumen by 2035.
- Additionally, Since the past decade, the use of LEDs for residential and commercial lighting has increased exponentially, with a wide range of features that incandescent and fluorescent lighting systems are unable to deliver.
- Since the outbreak of COVID-19, various businesses have been facing challenges pertaining to the supply chain. The LED industry is no exception; as a prominent share of the raw materials for the production of LEDs and Drivers originated from Asian countries, the industry was significantly influenced during the months of March and April as the region was under severe clutches of the pandemic. Further, the pandemic led to a decline in demand for display panels from the automotive and consumer electronics industries. Consumers have reduced their spending on expensive products, such as high-end smartphones and OLED TVs, which has negatively impacted the market.
- Owing to the supply chain issues, the prices of LEDs are expected to go up for a short period of time and may last till mid-2021. According to the industry body ELCOMA, prices of LED bulbs and lights may see an increase of up to 10% from March due to supply chain shortages.

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North America LED Packaging Market Trends

Growing Commercial Segment Demand is Expected to Boost the Studied Market

- LED lighting products are known for their performance, efficiency, and long-term savings, as the light output efficiency of LED packages can generally reach 80 to 90%. The benefits of LED lighting in offices, workplaces, or commercial buildings are limited to the above factors, and that installing high-quality LED lights creates a healthy work environment and increases employee productivity.
- For any commercial space, power requirement, dimming status, IP ratings, efficiency, and power rating are most important before choosing the right LED packages as per requirement. For instance, different occasions and LEDs with different sizes, heat-dissipation methods, and luminescence efficiency will have different types of LED packages such as Lamp-LED, TOP-LED, Side-LED, SMD-LED, High-Power-LED, Flip Chip-LED, etc.
- Commercial buildings like offices account for almost twenty percent of the United States' total energy consumption, and thirty-eight percent of this energy consumption is attributed to lighting. In the historical market period, widely-utilized lighting methods were compact fluorescent, linear fluorescent, high-intensity discharge, and incandescent lightings.
- Further, the high-end commercial lighting market mainly includes museums, galleries, and other exhibition lighting applications that primarily use downlights, projectors, and reflectors. Major American manufacturers are also actively developing the LED lighting business, with the rising LED lighting penetration rate.
- LED lighting manufacturers are further anticipated to witness lucrative market opportunities in the commercial construction segment. The rising cost of energy and increased focus on strong cost management have also supported the strong take-up of energy-saving products, like LED lighting in different commercial settings, and is expected to drive the studied market. For instance, in Aug 2020, The YMCA of Greater Nashua announced that it had taken a large step in improving its carbon footprint by upgrading and converting the Y's three facility branches to full LED lighting. The project cost to the YMCA after rebates and incentives was USD 190,000, and it further anticipates that in 24 months, the project will pay for itself in cost savings. In the current market scenario, LEDs lead to around 50% to 70% energy savings and are expected to penetrate almost every niche of commercial lighting.

Chip Scale Package is Expected to Grow Significantly in the Forecast Period

- A chip scale package (CSP) LED package has a close-ratio between the volume of the LED chip and the total volume of the LED package. It is essentially a bare LED die on which a phosphor layer is coated, with the underside of the die metalized with the P and N contacts to form the electrical connection and thermal path.
- The growing demand for CSP LED architecture which is the latest incarnation of flip-chip LEDs and prevents light loss due to the mounting of electrode pad on the upside of P-type GaN layer while improving heat transfer efficiency and package reliability due to a significant cost saving in commercial infrastructure is expected to augment the studied market.
- Vendors in the market are introducing new products to maintain their competitive advantage. For instance, Samsung introduced LM101B CSP LEDs that use a film phosphor in the conversion layer to reduce surface roughness and enable uniform control of thickness with small color dispersion. The fillet-enhanced CSP (FEC) technology forms TiO₂ (Titanium dioxide) walls around the chip surface to reflect its light output toward the top, allowing the mid-power CSP to deliver an industry-leading efficacy of up to 205 lm/W (65mA, CRI 80+, 5000K).
- Moreover, some of the vendors offer Chip Scale Package (CSP) LEDs to specific applications. For instance, OSRAM designs CSP LEDs for high-class retail lighting in brand fashion boutiques and jewelry stores. Professional designs for customized CoB and small

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luminaires are the main applications being supported by CSP.

North America LED Packaging Industry Overview

North America LED packaging market is moderately competitive and consists of several major players. In terms of market share, few of the major players currently dominate the market. These major players with prominent shares in the market are focusing on expanding their customer base across foreign countries. These companies are leveraging on strategic collaborative initiatives to increase their market share and increase their profitability. The companies operating in the market are also acquiring start-ups to strengthen their product capabilities.

- September 2021 - Lumileds announced the launch of a new Luxeon 7070 (77-mm) LED based on a lead frame and plastic package, yet that is intended to target high-performing, ceramic, high-power LEDs in applications such as street lights and sports-venue lighting. In addition, developers working on color solid-state lighting (SSL) systems continue to get more options in their tool chest, including a Lumileds phosphor-converted, PC Red-Orange LED.
- August 2021 - Citizen Electronics Co., Ltd developed upward-lighting multicolor LEDs in the 'CL-V501 Series' that have realized a better color mixing property and being small and high in brightness. Shipment of samples would start from October 2021, and mass production is expected to start from January 2022.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Growing Demand For High-Speed Network
 - 4.2.2 Increasing Demand for Energy-efficient
- 4.3 Market Restraints
 - 4.3.1 Lack of Awareness and Higher Capital Investment Required
- 4.4 Industry Value Chain Analysis
- 4.5 Porter's Five Forces Analysis
 - 4.5.1 Threat of New Entrants
 - 4.5.2 Bargaining Power of Buyers
 - 4.5.3 Bargaining Power of Suppliers

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- 4.5.4 Threat of Substitute Products
- 4.5.5 Intensity of Competitive Rivalry
- 4.6 Assessment of the Impact of COVID-19 on the Market

5 MARKET SEGMENTATION

- 5.1 Type
 - 5.1.1 Chip-on-board (COB)
 - 5.1.2 Surface-mount Device (SMD)
 - 5.1.3 Chip Scale Package (CSP)
- 5.2 End-User Vertical
 - 5.2.1 Residential
 - 5.2.2 Commercial
 - 5.2.3 Other End-User Verticals
- 5.3 Geography
 - 5.3.1 North America
 - 5.3.1.1 United States
 - 5.3.1.2 Canada

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Lumileds Holding B.V.
 - 6.1.2 Dow Silicones Corporation
 - 6.1.3 Citizen Electronics Co.,Ltd.
 - 6.1.4 Cree, Inc.
 - 6.1.5 Epistar Corporation
 - 6.1.6 OSRAM Licht AG
 - 6.1.7 Everlight Electronics Co., Ltd.
 - 6.1.8 LG Corporation (LG Innotek)
 - 6.1.9 Samsung Electronics Co. Ltd
 - 6.1.10 Nichia Corporation

7 INVESTMENT ANALYSIS

8 FUTURE OF THE MARKET

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