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Automotive Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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Report description:

Automotive Lighting Market Analysis

Automotive lighting market size in 2026 is estimated at USD 25.7 billion, growing from 2025 value of USD 24.45 billion with 2031 projections showing USD 32.98 billion, growing at 5.12% CAGR over 2026-2031. The market's growth is primarily linked to stricter global energy-efficiency policies, rapid LED penetration, and rising demand for smarter, personalization-ready lighting modules. Automakers continue to shift away from power-hungry halogen solutions toward highly integrated LED, OLED, and laser platforms that deliver lower electrical loads and richer functionality. Intensifying electric-vehicle production magnifies the importance of every watt saved, while adaptive driving beam approvals in key regions accelerate premium feature uptake. On the supply side, strategic partnerships between lighting specialists and semiconductor suppliers are shortening development cycles and unlocking digital-light projection opportunities that support advanced driver-assistance systems (ADAS) communication. Asia-Pacific remains the manufacturing hub, yet the Middle East and Africa promise the fastest volume gains as policymakers harmonize safety rules and build charging infrastructure.

Global Automotive Lighting Market Trends and Insights

LED-penetration mandates

Policymakers are phasing out energy-intensive lamps to meet CO?-reduction targets, pushing LEDs into every vehicle segment. European fleet calculations show potential savings of 1.48 TWh per year when full LED deployment is achieved. The United States amended FMVSS 108 in 2024, legalising adaptive driving beams and further incentivising LED headlamp adoption. UN Regulation 148 unifies approval codes, easing global homologation for next-generation devices.

Smart-cockpit and ambient-experience demand

Interior modules now blend thousands of RGB LEDs to create wellness-centric cabins that synchronise with infotainment cues. Mercedes-Benz DIGITAL LIGHT packs over 2 million pixels and projects road symbols to augment driver awareness. Laboratory studies confirm that advanced calibration improves colour accuracy and uniformity in direct-lit guides, removing hotspot artefacts in premium dashboards.

High upfront cost of advanced modules

Digital OLED tail-lamps in luxury models such as the Audi Q5 use 18 individually addressable segments that raise BOM and tooling costs. Tandem-stack OLED prototypes achieve 77% external quantum efficiency at 46,000-hour lifetimes, yet manufacturing complexity limits mass-market migration. Micro-LED replacements can shave 30 W and 1 kg from a headlamp assembly, but capital equipment costs remain significant.

Other drivers and restraints analyzed in the detailed report include:

EV energy-efficiency requirementsDigital-light projection for ADAS/V2XSemiconductor and raw-material volatility

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The passenger cars segment dominated the Automotive Lighting Market with a 68.92% Share in 2025 revenues. Meanwhile, Two-wheelers are expected to register the fastest 7.15% CAGR. The automotive lighting market size within Two-wheelers will climb as e-scooters prioritize low-draw LEDs to preserve battery autonomy. Fiem Industries disclosed more than 80 active LED projects for bikes scheduled to hit assembly lines within three years. Light commercial fleets lean on adaptive headlamps to increase last-mile safety in dense urban corridors. Medium and heavy trucks upgrade more slowly, but mandatory conspicuity tape and running-light laws still feed a steady retrofit pipeline.

Adaptive LED headlamps using multi-sensor fusion debuted on several 2025 domestic Chinese sedans and cascaded to motorcycle variants to counter bend-lighting blind spots. Passenger-car premium trims already bake in digital-light projection and signature DRL patterns to reinforce brand identity, whereas fleet operators concentrate on durability and cost per lumen. Over the forecast horizon, small-format LEDs and heatsink-free optics will let low-cost scooters adopt ADB features previously limited to luxury cars.

Exterior modules segment dominated the Automotive Lighting Market with a 78.02% share in global revenues in 2025, but Interior solutions are set to outpace with an 7.88% CAGR. Roof and foot-well zones now host addressable RGB arrays that coordinate with climate controls and infotainment events. Studies confirm that harmonized color temperature can cut driver fatigue during night-time commutes.

Headlamps remain technology testbeds: FMVSS updates permit adaptive driving beams, letting LEDs dynamically mask glare for oncoming traffic. OLED tail lights in premium SUVs deliver uniform luminance across complex shapes, which is impossible with discrete LEDs. Interior light bars that mirror ADAS warnings are now bundled with Level-3 autonomy packages, linking ambient cues to external lamp behavior.

The Automotive Lighting Market Report is Segmented by Vehicle Type (Passenger Cars, Light Commercial Vehicles, and More), Application (Exterior (Headlamps, Taillights, Fog Lamps, and More) and Interior (Ambient/Footwell and Roof/Dome)), Technology (Halogen, Xenon / HID, LED, Laser and More), Sales Channel (OEM and Aftermarket), and Geography. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

Geography Analysis

Asia-Pacific dominated the Automotive Lighting Market and holds 32.22% of 2025 revenues, cementing its role as a production center for global carmakers. Chinese tier-one suppliers now export adaptive LED modules compliant with UN Regulation 148, widening market options beyond traditional Japanese and European incumbents. Local champions in Guangdong reported that smart-lighting contracts accounted for 41.5% of 2024 revenue. Apan refines multi-sensor headlamp fusion, while India's two-wheeler boom accelerates LED demand across commuter bikes.

The Middle East and Africa are expected to log the fastest 6.88% CAGR as Gulf states build EV charging corridors and roll out national safety codes that mirror EU glare thresholds. Saudi Arabia targets more than 5 million light-vehicle sales by 2025, and the UAE aims for 50% EV penetration by 2050, both policies fuelling the need for energy-efficient lamps. Governments also pursue photobiological safety audits, prompting OEMs to validate blue-light ratios before market entry.

Europe and North America are expected to expand at 4.65% and 5.35%, respectively, sustained by energy-conservation directives and premium-vehicle density. EU CO? standards reward automakers who cut electrical loads, positioning LEDs as low-hanging fruit. The United States sees heightened activity after FMVSS adaptive-beam approval, with domestic truck platforms planning digital-light updates in 2026 production cycles. South America advances at 6.55% CAGR as regional assemblers adopt consolidated platform architectures that integrate global-spec lighting modules, reducing cost per unit and easing aftermarket certification.

List of Companies Covered in this Report:

Koito Manufacturing Co. Ltd Stanley Electric Co. Ltd Valeo SE Forvia-HELLA GmbH & Co. KGaA Marelli Holdings Co. Ltd Tungsram Group Hyundai Mobis Co. Lumax Industries Ltd ams-OSRAM AG ZKW Group GmbH SL Corporation Nichia Corporation Continental AG DENSO Corporation Lear Corporation Bosch Mobility Lighting Modules LG Innotek Co. Panasonic Automotive Lighting Seoul Semiconductor Co.

Additional Benefits:

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

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