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# Lighting Control System Market - Global Outlook & Forecast 2021-2026

https://marketpublishers.com/r/LE3CA2CCCF62EN.html
Date: May 2021
Pages: 272
Price: US$ 3,750.00 (Single User License)
ID: LE3CA2CCCF62EN

## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Lighting Control System Market Report

The global lighting control system market by revenue is expected to grow at a CAGR of approx. 19% during 2020–2026.

The APAC region has dominated the market due to a large population and significant penetration of LED bulbs in Japan and China. One of the major sectors, which generates the demand for the lighting control system is indoor lighting. Countries such as India, Brazil, and others have put constant efforts into installing efficient-lighting control systems in outdoor/public places. The rising installment of lighting control systems through retrofitting has boosted the demand over the past few years. The commercial sector dominated the market in 2020, with offices accounting for the highest share in the market. The demand can be attributed to the growth in personal income, growing awareness of energy efficiency, and other demographic trends. Rapid urbanization and the increasing demand for smart and comfortable lifestyles expect to fuel the market growth. The COVID-19 pandemic has a negative effect on the market. One of the main effects of the pandemic on the lighting control device industry is the disruption in the availability of electrical components. Furthermore, the lighting industry's supply and demand have been influenced by a shortage of raw materials for producing light casings, chips, and other factors.

The following factors are likely to contribute to the growth of the lighting control system market during the forecast period:

The advent of IoT in Lighting Control Systems

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Growing Penetration of Luminaire Level Lighting Control

Increasing Demand for Energy-efficient Lighting

Shift from Conventional Lighting Products to SSLS

The study considers the lighting control system market's present scenario and its market dynamics for the period 2020?2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Lighting Control System Market Segmentation

The global lighting control system market research report includes a detailed segmentation by communication protocol, application, offerings, installation, geography. Wired communication protocols account for over 70% share in the market. This is majorly due to high safety and reliability. They account for the highest percentage as they were invented way before wireless protocols and most buildings comprise wired systems. Furthermore, since wired systems do not need any technical skills to install or run, many end-users continue to use them. However, since the wiring is a tedious task and is highly inefficient to retrofit applications, the demand for wired control systems is growing at a slower rate.

The indoor segment dominates the global lighting control system market share, accounting for over 90% of the market with an expected growth of over 18% during the forecast period. The outdoor segment constituted approx. 8% share of the global market in 2020; however, it expects to grow at a fast CAGR of over 23% during the forecast period. Increased focus of government agencies toward efficient energy usage and reduced carbon emission are taking initiatives to incorporate highly efficient lighting systems in outdoor settings. Increasing infrastructural activities in residential and commercial sectors across the world, along with rising disposable income and the growing demand for smart cities and smart houses, are the significant factors contributing to the growth of lighting systems. Installation and use of lighting controls are providing enormous opportunities for energy savings globally. The inherent properties of SSL offer the opportunity to integrate controls and increase the energy savings potential of lighting systems. The controllability of LED technology and the low cost to integrate

sensing, data processing, and network interface hardware are expected to boost the demand for lighting control systems from both indoor and outdoor applications.

The hardware lighting control system market expects to reach approx. USD 18 billion by 2026. The hardware segment accounts for over 70% share in the market. The increasing installation of LED-based systems from government agencies to achieve energy efficiency and reduce operational expenditure is likely to drive demand for hardware components. Moreover, the increasing demand for infrastructural development and modernization requiring the deployment of the hardware component is influencing market growth.

New installations are likely to account for almost 78% share of the market. A significant increase in construction activities, rapid infrastructural development, rising government concern about energy consumption in new buildings, and the growing installment of outdoor lighting demand for new installation. Although new installations currently dominate the market, the demand for retrofit installation expects to grow at a CAGR of almost 21% compared to 18% for new installations. The advent of IoT, lighting control software, wireless communication protocols, and requirements for replacing inefficient lights are propelling the demand for retrofit installations. The market is witnessing a growing demand for retrofit installations from several application end-users segments.

Communication Protocol

- Wired
- Wireless

Application

- Indoor
  - Residential
  - Commercial
  - Industrial & Others
- Outdoor

Highways & Roadways

Others

Offerings

Hardware

Software & Services

Installation

New

Retrofit

INSIGHTS BY GEOGRAPHY

In 2020, APAC dominated the lighting control system market accounting for over 42% share by revenue. Owing to its huge population, increasing affordability of consumers, rising awareness, and significant shift in lifestyle are expected to add fuel to the demand for lighting control systems. China, Japan, and South Korea are leading the region. However, countries such as India, Australia, and New Zealand expect to grow high CAGRs during the forecast period. China accounted for approx. 40% share in the APAC region, followed by Japan with a share of over 28%. Although India accounted for a low percentage, it is likely to grow at a CAGR of over 34% and could emerge as one of the fastest-growing countries in the market. Significantly increasing investments in infrastructural development, rising adoption of LED, and improving disposable income of people are expected to fuel the market growth in India.

Geography

North America

US

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- Canada
- Europe
  - UK
  - Germany
  - France
  - Italy
  - Spain
- APAC
  - China
  - Japan
  - South Korea
  - India
  - Rest of APAC
- Latin America
  - Brazil
  - Mexico
  - Rest of Latin America
- Middle East & Africa
  - Saudi Arabia

UAE

Rest of Middle East & Africa

INSIGHTS BY VENDORS

Legrand, Eaton, OSRAM Licht Group, Acuity Brands Lighting, Hubbell, and Signify Holding are the key players in the global lighting control system market. The lighting industry is influenced by new technologies such as solid-state, electronic drivers, embedded controls, and effective optical designs and lamps; federal, state, and local requirements for updated energy codes; and incentives from federal, state, and local municipal authorities, as well as utility companies, to use more energy-efficient lighting. The threat of new entrants is high as vertical integration is easy for vendors involved in manufacturing lights, bulbs, and lamps. Moreover, software and technology companies are also expected to enter the market to offer software solutions.

Prominent Vendors

Legrand

Eaton

OSRAM Licht Group

Acuity Brands Lighting

Hubbell

Signify Holding

Lutron Electronics

Helvar

Other Prominent Vendors

Honeywell International

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Ideal Industries

Cree Lighting

Universal Douglas Lighting Americas

LSI Industries

RAB Lighting

Dialight

Synapse Wireless

WAGO

Leviton Manufacturing

Lightwave

KEY QUESTIONS ANSWERED:

1. How big is the lighting control system market?
2. What is the growth rate of the lighting control system market?
3. What is an intelligent lighting control system?
4. Which region is likely to account for the highest revenue during the forecast period?
5. Who are the key players in the lighting control system market?
6. How has the arrival of IoT influenced the lighting control market?

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