

Global Human Centric Lighting Market Size Study and Forecast by Product (Fixtures, Controllers [Sensors, Drivers, Microcontrollers, Others], Software, Services), by Installation Type (New, Retrofit), by Application (Residential, Commercial, Education, Office, Healthcare, Industrial, Others), and Regional Forecasts 2026–2036

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Abstracts

The Global Human Centric Lighting (HCL) Market, valued at USD 4.83 billion in 2025, is anticipated to reach USD 41.84 billion by 2036, expanding at a 20.8% CAGR during the forecast period. Human Centric Lighting (HCL) is an intelligent lighting system which supports human health, comfort, productivity and well-being by varying the intensity, colour temperature and spectrum of light in line with natural circadian rhythms. The market comprises lighting fixtures, intelligent controllers, sensors, drivers, microcontrollers, software platforms and professional services for residential, commercial, education, healthcare, office and industrial use. The market growth is driven by increasing awareness on the benefits of circadian lighting, rapid adoption of smart building technologies, expansion of energy efficient LED systems and growing investments in healthy indoor environments. Energy-efficient lighting technologies are continuing to expand globally, according to the International Energy Agency (IEA, 2024), as governments and businesses prioritize sustainability and the modernization of buildings. Further, continued innovation in IoT-enabled lighting controls, artificial intelligence, wireless connectivity and building automation systems are driving growth of the market.

Global Human Centric Lighting Market: Key Highlights

The Global Human Centric Lighting Market is projected to reach USD 41.84

billion by 2036 from USD 4.83 billion in 2025 at a CAGR of 20.8% during the forecast period.

Europe leads the market due to the high adoption of smart buildings, strict regulations on energy efficiency, and increasing investment in sustainable lighting infrastructure.

Asia Pacific is projected to witness highest growth rate during the forecast period owing to rapid urbanization, smart city projects, commercial construction and rising adoption of intelligent lighting systems.

The fixture segment is expected to account for the largest share of the product in 2023, owing to the widespread installation of fixtures in residential, commercial, healthcare, and educational establishments.

Commercial applications are the largest end-use segment with companies investing more in employee well-being, workplace productivity and smart office environments.

The new installation continues to have the largest market share due to the growing construction of smart buildings and green infrastructure projects.

Product innovation continues to be driven by IoT-enabled lighting controls, AI-based lighting management, occupancy sensing and daylight harvesting technologies.

Growing focus on occupant wellness, ESG initiatives and sustainable building certifications are creating long-term market opportunities.

Research Scope & Methodology

This report provides an analysis of the Global Human Centric Lighting Market by market segments such as product types, installation trends, application demand, technological developments, competitive dynamics, and regional market performance from 2025 to 2036. The study covers fixtures, intelligent controllers, software platforms and services used in residential, commercial, educational, healthcare, office, industrial, and other applications.

The research methodology includes the primary interviews with lighting manufacturers, smart building solution providers, LED component suppliers, building automation

companies, distributors, architects, engineering consultants, and industry executives. Secondary Research Secondary research includes authenticated publications after 2022 published by energy agencies, lighting associations, government organizations, green building councils, and international technology institutions. Market estimates are based on lighting system installations, commercial construction activity, smart building adoption, LED penetration, retrofit projects and energy efficiency investments. Forecast models use macro-economic indicators, urbanisation, regulatory changes, sustainability initiatives, IoT adoption, digital building management and technological innovation. Data triangulation across manufacturers, integrators, distributors and end users ensures the forecasting is accurate and robust.

Key Market Segments

By Product:

Fixtures

Controllers

Sensors

Drivers

Microcontrollers

Others

Software

Services

By Installation Type:

New

Retrofit

By Application:

Residential

Commercial

Education

Office

Healthcare

Industrial

Others

Key Market Players

Zumtobel Group

Signify Holding

Hubbell Inc.

OSRAM Licht AG

LEDVANCE GmbH

Leadarson IoT Technology Inc.

Wipro Group

Glamox A.S.

Legrand S.A.

TRILUX GmbH & Co. KG

Industry Trends

Global Human Centric Lighting Market Size Study and Forecast by Product (Fixtures, Controllers [Sensors, Drive...

Circadian lighting solutions are increasingly being deployed in offices, hospitals, schools and residential buildings to improve health, sleep quality, productivity and well-being of occupants.

Smart lighting systems integrated with IoT platforms, occupancy sensors, daylight harvesting and wireless controls are continuing to revolutionize modern building management.

Artificial intelligence is being increasingly integrated into lighting management systems to automatically optimize brightness, color temperature, occupancy patterns and energy consumption.

Commercial buildings are adopting human-centric lighting to promote employee wellness initiatives, enhance workplace efficiency and pursue green building certifications .

Healthcare facilities are implementing dynamic lighting systems to assist in patient recovery, regulate circadian rhythms and improve clinical environments.

Schools are implementing adaptive lighting solutions to enhance students' concentration, cognitive capacity and learning efficiencies.

LED technology is still the foundation of human-centric lighting because of its energy efficiency, long operational life, dimming capability and flexible color tuning.

As companies upgrade legacy lighting systems with smart LED-based human-centric lighting solutions, retrofit projects are gaining momentum.

Commercial and industrial infrastructure are increasingly integrated with building automation systems, cloud-based lighting management platforms, and digital twins.

The continuing promotion by governments around the world of energy-efficient buildings and smart city development creates ongoing demand for intelligent human-centric lighting technologies.

Market Determinants

Rising Adoption of Smart Buildings and Intelligent Infrastructure: The rapid deployment of smart buildings is one of the primary drivers of the human centric lighting (HCL) market. Building owners are increasingly integrating intelligent lighting systems with building management systems (BMS), IoT platforms, and occupancy sensors to improve energy efficiency while enhancing occupant comfort and productivity. According to the International Energy Agency (IEA, 2024), investments in energy-efficient buildings and smart infrastructure continue expanding globally, creating strong demand for intelligent lighting solutions.

Growing Awareness of Circadian Health and Employee Well-Being: Organizations are increasingly recognizing the impact of lighting on human health, cognitive performance, sleep quality, and workplace productivity. Human centric lighting systems dynamically adjust color temperature and light intensity to align with natural circadian rhythms, helping improve employee well-being, reduce fatigue, and enhance concentration. This growing awareness is accelerating adoption across offices, healthcare facilities, educational institutions, and residential environments.

Expansion of LED and IoT-Based Lighting Technologies: Continuous advancements in LED technology, wireless communication, artificial intelligence, cloud-based lighting controls, and occupancy sensing are significantly improving the functionality of HCL systems. Intelligent lighting solutions now provide automated daylight harvesting, personalized lighting profiles, predictive maintenance, and real-time energy optimization. These technological developments continue making HCL systems more attractive for both new installations and retrofit projects.

Increasing Government Focus on Energy Efficiency and Sustainable Buildings: Governments worldwide are implementing stricter building energy regulations and encouraging adoption of energy-efficient technologies through green building standards and sustainability initiatives. According to the International Energy Agency (IEA, 2024), efficient lighting remains one of the most cost-effective measures for reducing building energy consumption and carbon emissions. These regulatory initiatives continue supporting widespread deployment of intelligent LED lighting systems.

High Initial Installation and Integration Costs: Despite offering long-term operational savings, human centric lighting systems require substantial upfront

investment in intelligent fixtures, controllers, sensors, software platforms, and system integration. Small and medium-sized organizations may postpone adoption due to higher capital expenditure and longer return-on-investment periods compared to conventional lighting systems.

Limited Awareness in Emerging Markets: Although awareness of circadian lighting benefits is increasing, adoption remains relatively limited in many developing economies where purchasing decisions continue to prioritize initial cost over long-term operational efficiency and occupant wellness. Limited technical expertise and lower smart building penetration also slow market expansion in certain regions.

Opportunity Mapping Based on Market Trends

Expansion of Smart City and Green Building Projects: Governments and private developers are investing heavily in smart cities, intelligent commercial buildings, and sustainable infrastructure, creating significant opportunities for human centric lighting providers. According to the United Nations Environment Programme (UNEP, 2024), sustainable building technologies are becoming increasingly important for reducing environmental impact and improving occupant well-being. Human centric lighting systems are expected to become integral components of future smart infrastructure.

Growing Adoption Across Healthcare and Educational Facilities: Hospitals, senior living facilities, schools, and universities are increasingly implementing circadian lighting solutions to improve patient recovery, regulate sleep cycles, enhance learning environments, and support mental well-being. This growing adoption across public infrastructure creates long-term opportunities for manufacturers specializing in intelligent lighting technologies.

Increasing Retrofit Opportunities in Existing Buildings: A large proportion of commercial and institutional buildings continue operating with conventional lighting systems. Retrofitting these facilities with intelligent LED-based human centric lighting offers significant energy savings, improved occupant comfort, and compliance with evolving sustainability standards. Retrofit demand is expected to accelerate as organizations pursue carbon reduction and operational efficiency objectives.

Integration of Artificial Intelligence and Cloud-Based Lighting Platforms: Artificial intelligence, cloud computing, and advanced analytics are transforming lighting management through automated occupancy detection, predictive maintenance, adaptive lighting control, personalized lighting profiles, and real-time energy optimization. Companies investing in AI-enabled software platforms and connected lighting ecosystems are expected to capture substantial long-term growth opportunities as intelligent buildings become increasingly widespread.

Value-Creating Segments and Growth Pockets

Fixtures dominate the market through widespread deployment across smart lighting installations

By product segment, the market has been segmented into: Fixtures, Controllers (Sensors, Drivers, Microcontrollers, Others), Software and Services. Fixtures hold the major share in the global human centric lighting market, estimated to have a share of 47.2% in 2025. They are the leaders because they are widely installed in commercial offices, healthcare, education, residential and industrial settings. The core of human-centric lighting systems are intelligent LED fixtures that can dynamically adjust brightness and color temperature. Increased investment in smart buildings, energy-efficient infrastructure and occupant wellness is fueling demand for advanced lighting fixtures. LED lighting continues to be at the heart of global energy-efficiency initiatives (IEA, 2024), which supports the strong demand for intelligent lighting fixtures.

The Software segment is projected to grow at the highest CAGR of 24.1% during the forecast period. Increasing adoption of cloud-based lighting management platforms, AI-enabled lighting optimization, remote monitoring, and building analytics is driving the demand for intelligent software solutions to control large-scale lighting ecosystems.

New installations lead the market while retrofit projects accelerate

According to the Installation Type segment, New Installations is projected to hold the largest market share in 2025, with an estimated 63.8%. Rapid construction of smart commercial buildings, healthcare facilities, educational campuses and green certified infrastructure drives the widespread usage of integrated human centric lighting systems during the design phase of the building. Increasingly, smart lighting is being included in new construction projects as part of building automation strategies.

The Retrofit segment is anticipated to register the fastest growth with an estimated CAGR of 22.5% during 2026–2036. The increasing upgrades of legacy fluorescent and conventional LED lighting systems to smart human-centric lighting solutions by organizations to achieve energy efficiency, better occupant well-being, and to adhere to the changing sustainability norms.

Commercial applications generate maximum value through workplace wellness

initiatives

Commercial buildings segment by Application is expected to hold the largest market share during the forecast period. The growth in this segment can be attributed to the growing corporate investment in employee health, workplace productivity, smart office environment, and ESG initiatives. Human-centric lighting is now widely deployed in offices, retail spaces, hotels, airports and public buildings to improve visual comfort, reduce fatigue and optimise the occupant experience. Intelligent lighting systems also help to reduce energy consumption and improve building operational efficiency.

The Healthcare segment is anticipated to grow at the fastest rate during the forecast period due to the increasing adoption of circadian lighting systems by hospitals, rehabilitation centres, senior care facilities, and wellness institutions for patient recovery, sleep cycle regulation, stress reduction, and health care improvements.

Companies investing in AI-enabled lighting controls, integrated building management platforms, adaptive LED fixtures and cloud-based lighting analytics are expected to capture significant long-term growth opportunities across the global human centric lighting market.

Regional Market Assessment

Europe dominates the market through advanced smart building adoption and stringent energy efficiency regulations

In 2025, Europe's human centric lighting market held the largest share of the global market, accounting for an estimated 36.8% of the total revenue. The region is characterized by high adoption of smart building technologies, stringent energy efficiency regulations and widespread adoption of sustainable construction practices. Human centric lighting is one of the most popular lighting solutions in Germany, the Netherlands, Sweden, France, and the UK for commercial offices, healthcare facilities, educational institutions, and public infrastructure. European Commission (2024) reports that investments in intelligent lighting systems are still expanding because of efforts to promote energy-efficient buildings, digital infrastructure, and carbon reduction. The growing awareness of employee wellness and healthy indoor environments further strengthens Europe's leading position in the market.

North America maintains a strong position through workplace modernization and healthcare investments

North America is one of the largest regional markets owing to the rapid adoption of smart office technologies, growing investments in healthy workplaces and the modernization of commercial buildings. The U.S. is the largest regional demand contributor, driven by the widespread adoption of smart lighting systems in corporate offices, hospitals, educational institutions, and government facilities. According to the U.S. Department of Energy (2024), energy-efficient LED lighting and smart building technologies continue to be important in reducing commercial building energy

consumption. The rising adoption of building automation systems and workplace wellness initiatives continue to support the strong demand for human centric lighting solutions.

Asia Pacific records the fastest growth through urbanization and smart city development. Asia Pacific is expected to register the fastest growth during the forecast period, with an estimated CAGR of 23.1% from 2026 to 2036. Rapid urbanization, rise in commercial construction, increased investment in smart cities, and increased awareness of energy-efficient technologies are driving the growth of the market in China, Japan, South Korea, India, Singapore, and Australia. The International Energy Agency (IEA, 2024) notes that the rapid adoption of energy-efficient lighting technologies in developing economies is still contributing to growth across the region. The government initiatives for green buildings and digital infrastructure are further driving the adoption of intelligent human centric lighting systems.

LAMEA presents emerging opportunities through infrastructure modernization and sustainability initiatives.

The LAMEA region is expected to witness steady market growth driven by increasing investments in commercial infrastructure, healthcare facilities, hospitality projects and smart public buildings. Intelligent lighting systems are being aggressively adopted in smart city developments, airports, commercial complexes and luxury real estate projects in Middle Eastern countries. In Latin America, LED based human centric lighting adoption is gradually taking place with the governments promoting energy efficiency and sustainable infrastructure. The World Bank (2024) notes that ongoing urbanization and infrastructure investment in emerging economies continue to support demand for advanced building technologies. Africa is slowly becoming a promising market, with growing commercial construction activity, electrification projects and smart infrastructure investments expected to create long-term opportunities for human centric lighting providers.

Recent Developments

June 2025: Signify Holding expanded its human centric lighting portfolio by introducing AI-enabled connected lighting solutions featuring adaptive circadian lighting, occupancy-based automation, and cloud-integrated lighting management for commercial buildings and healthcare facilities.

April 2025: Zumtobel Group launched next-generation human centric LED luminaires designed for offices, educational institutions, and healthcare environments, incorporating advanced daylight harvesting, tunable white lighting, and intelligent control systems.

October 2024: LEDVANCE GmbH strengthened its smart lighting portfolio by introducing IoT-enabled human centric lighting systems with wireless connectivity, energy monitoring, and automated lighting optimization for commercial and industrial applications.

August 2024: Legrand S.A. expanded its intelligent building solutions by integrating human centric lighting controls with building automation platforms, enabling centralized management of lighting, occupancy sensing, and energy optimization across smart commercial facilities.

Critical Business Questions Addressed

What is the current and projected size of the global human centric lighting market?

The global human centric lighting market was valued at USD 4.83 billion in 2025 and is projected to reach USD 41.84 billion by 2036, growing at a CAGR of 20.8% during the forecast period.

Which factors are driving market growth?

The market is driven by increasing adoption of smart buildings, growing awareness of circadian health and occupant well-being, expansion of energy-efficient LED technologies, rising implementation of IoT-enabled lighting systems, and government initiatives promoting sustainable and intelligent infrastructure.

Which product segment dominates the market?

Fixtures hold the largest market share due to their widespread deployment across commercial offices, healthcare facilities, educational institutions, residential buildings, and industrial environments. Intelligent LED fixtures capable of dynamic brightness and color temperature adjustment remain the core component of human centric lighting systems.

Which installation type and application segments are expected to generate the greatest value?

New Installations currently dominate the market owing to rapid construction of smart buildings and green infrastructure, while the Commercial application segment generates the highest revenue through increasing investment in employee wellness, workplace productivity, energy efficiency, and intelligent office environments. The Healthcare application is expected to experience the fastest growth during the forecast period.

Which regions offer the strongest future growth opportunities?

Europe currently leads the global market through strong smart building adoption and stringent energy efficiency regulations. Asia Pacific is projected to register the fastest growth due to accelerating urbanization, expanding smart city initiatives, commercial construction, and increasing investment in sustainable building technologies, while

North America continues to generate significant demand through workplace modernization and healthcare infrastructure development.

Beyond the Forecast

The human centric lighting market is expected to evolve toward AI-powered adaptive lighting ecosystems, where artificial intelligence continuously adjusts illumination based on occupant behavior, circadian rhythms, daylight availability, space utilization, and environmental conditions to optimize health, comfort, and energy performance.

Integration with smart building platforms, digital twins, cloud-based analytics, occupancy sensing, and IoT-enabled building management systems will transform lighting from a standalone utility into an intelligent component of connected infrastructure capable of delivering predictive maintenance, personalized lighting experiences, and real-time operational insights.

As green buildings, ESG initiatives, workplace wellness programs, healthcare modernization, and smart city development continue expanding worldwide, manufacturers investing in intelligent LED technologies, software-driven lighting management, interoperable building automation, and energy-efficient human centric lighting solutions will be well positioned to achieve sustained long-term growth in the global human centric lighting market.

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