

# **Global LED Light Engine Market Size study & Forecast, by Product Type (Lamps and Luminaires), by Installation Type (New Installation and Retrofit Installation), by End-Use Application (Indoor Lighting and Outdoor Lighting) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global LED Light Engine Market is valued approximately at USD 59.56 billion in 2024 and is anticipated to grow at a CAGR of around 14.70% during the forecast period 2025-2035. A Light Engine represents the core of modern LED illumination systems, integrating one or more LEDs, along with the driver and optical components, into a unified, ready-to-use module. This integrated design optimizes performance, enhances energy efficiency, and ensures longer operational life compared to conventional lighting solutions. As smart city infrastructure, sustainable architecture, and intelligent lighting systems continue to gain traction globally, LED light engines are increasingly being deployed across commercial, industrial, and residential settings. The transition toward energy-efficient lighting, coupled with stringent global energy standards, is a key catalyst driving market expansion. Moreover, continuous technological advancements in optics, materials, and wireless control systems are reshaping the lighting landscape, allowing manufacturers to deliver adaptable, high-performance light engines that align with next-generation smart environments.

The accelerated global shift toward eco-conscious infrastructure has amplified the demand for LED light engines, particularly as governments introduce aggressive carbon reduction policies and phase out inefficient lighting. According to the International Energy Agency (IEA), global lighting accounts for nearly 15% of total electricity consumption, with LEDs capable of reducing this by more than 50%. Such figures have

compelled both consumers and corporations to transition rapidly toward LED-based solutions. The proliferation of IoT-enabled lighting systems and human-centric lighting technologies has further diversified the applications of LED light engines. Additionally, advancements in miniaturization, heat management, and color tuning have paved the way for highly customizable lighting environments. However, fluctuations in raw material prices, high initial setup costs, and technical complexities associated with compatibility and driver design may somewhat restrain growth during the forecast period.

The detailed segments and sub-segments included in the report are:

By Product Type:

Lamps

Luminaires

By Installation Type:

New Installation

Retrofit Installation

By End-Use Application:

Indoor Lighting

Outdoor Lighting

By Region:

North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

## Luminaires Segment Expected to Dominate the Market

Among product types, the Luminaires segment is projected to hold the lion's share of the global LED light engine market throughout the forecast period. This dominance stems from the increasing adoption of integrated lighting systems in commercial complexes, industrial facilities, and public infrastructure. Luminaires—comprising advanced optics, intelligent controls, and modular light engines—enable enhanced luminous efficacy and aesthetic flexibility, aligning seamlessly with architectural and environmental requirements. Moreover, manufacturers are increasingly focusing on product differentiation through smart luminaire design and embedded sensor technologies that respond to real-time occupancy, daylight, and ambient conditions. While lamps maintain a considerable share due to cost-effectiveness and easy replacement, luminaires are expected to remain the cornerstone of revenue generation owing to their energy optimization and design versatility.

## Retrofit Installations Lead in Revenue Contribution

In terms of installation type, Retrofit Installation currently leads the market in revenue contribution. The trend toward retrofitting existing infrastructures with LED light engines has surged as businesses and municipalities seek to modernize facilities without major structural overhauls. Retrofitting offers immediate energy savings, lower maintenance costs, and compliance with updated building energy codes—all while minimizing downtime. The push for carbon neutrality and government-led rebate programs have further accelerated the retrofit wave. Conversely, New Installations are expected to grow steadily, supported by smart city projects, urban expansion, and next-generation residential developments that prioritize fully integrated lighting systems. This dynamic interplay between retrofit and new build adoption underscores the market's holistic shift toward sustainability and intelligent design.

The key regions analyzed for the Global LED Light Engine Market include Asia Pacific, North America, Europe, Latin America, and the Middle East & Africa. Among these, Asia Pacific is poised to dominate the market through 2035, primarily driven by rapid urbanization, infrastructural investments, and the presence of large-scale manufacturing hubs in China, Japan, and South Korea. The region's aggressive push toward smart city initiatives and renewable energy adoption has intensified the deployment of advanced LED systems. North America follows closely, benefiting from strong regulatory frameworks, technological innovations, and increasing adoption of smart home ecosystems. Europe, on the other hand, is projected to experience robust growth due to stringent EU energy directives, architectural modernization projects, and rising demand for human-centric and adaptive lighting solutions. Meanwhile, the Middle East and Latin America present emerging opportunities as infrastructural and commercial lighting projects expand.

Major market players included in this report are:

Signify Holding (Philips Lighting)

OSRAM Licht AG

Acuity Brands Lighting, Inc.

Zumtobel Group AG

Cree LED, Inc.

Hubbell Lighting, Inc.

Seoul Semiconductor Co., Ltd.

Nichia Corporation

GE Current, a Daintree Company

Tridonic GmbH & Co KG

Lumileds Holding B.V.

Eaton Corporation plc

Bridgelux, Inc.

Toyoda Gosei Co., Ltd.

Everlight Electronics Co., Ltd.

### Global LED Light Engine Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast the values for the coming years. The report is designed to integrate both qualitative and quantitative aspects of the industry within the countries covered. It also provides detailed insights into crucial growth drivers and challenges that will shape the market's future trajectory. Additionally, it highlights potential investment opportunities within micro-markets and delivers an in-depth analysis of the competitive landscape, innovation trends, and product offerings of key players. The detailed segments and sub-segments of the market are explained above.

### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level breakdown.

Competitive landscape featuring key players' profiles and strategies.

Strategic recommendations and insights for future market positioning.

Comprehensive demand-side and supply-side market analysis.

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