

Global LED Lighting Surge Protective Devices Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global LED Lighting Surge Protective Devices market size is expected to reach \$ 478 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

In 2025, global LED Lighting Surge Protective Devices production reached approximately 34.27 M Units. The average price is approximately \$6.20. LED Lighting Surge Protective Devices are electrical protection components installed inside or adjacent to LED luminaires, upstream of LED drivers, in pole-base terminal compartments, lighting distribution boards, branch circuits, or lighting-control interfaces.

LED Lighting Surge Protective Devices constitute a specialized component market rather than a simple proportional subset of the broader low-voltage SPD industry. The addressable product is shaped by the relatively sensitive electronic architecture of LED drivers and control systems, the high exposure of outdoor luminaires, long pole and feeder wiring, ground-potential differences, and the disproportionately high service cost of failed roadway, tunnel, stadium, or high-bay fixtures. Under the narrow scope adopted in this study, the market covers separately identifiable devices with dedicated part numbers, declared surge performance, and explicit positioning for luminaires, LED drivers, pole bases, lighting cabinets, or lighting-control interfaces. Generic building-distribution SPDs, discrete MOVs, GDTs and TVS components, and the basic surge immunity embedded in an LED driver are treated outside the core revenue boundary. This approach produces a smaller but more analytically coherent market than broad estimates that combine all surge-protection products used anywhere in a lighting installation.

The global supply structure comprises four overlapping groups: diversified electrical-

protection companies, specialist surge-protection manufacturers, lighting or LED-driver suppliers with complementary SPD portfolios, and regional OEM or ODM producers. Littelfuse, Mersen, CITEL, DEHN, Eaton, and Signify form the leading group because of their global certification capabilities, broad product coverage, established lighting or electrical channels, and ability to support coordinated protection across luminaires, poles, cabinets, and control networks. OBO Bettermann, DITEK, Hatch Lighting, Prosurge, MEAN WELL, SALTEK, Finder, HAKEL, and ZOTUP represent a strong second tier with regional, product-format, or application-specific advantages. A further group of manufacturers in mainland China, Taiwan, India, Australia, and Southern Europe serves private-label, cost-sensitive, or specialized infrastructure requirements. The estimated top ten account for roughly one-half of the narrow market, indicating moderate concentration: leading brands retain advantages in certification and OEM qualification, but entry barriers remain manageable for manufacturers with MOV/GDT sourcing, thermal-disconnection expertise, molding capabilities, and access to independent test laboratories. The broader longlist is materially larger than the core formal list because several credible SPD manufacturers, including Phoenix Contact, Weidmüller, Bourns, OTOWA, and Sankosha, have strong general capabilities but insufficient evidence of a currently marketed, separately identifiable LED-lighting-specific product line.

Demand remains concentrated in applications where the expected cost of failure materially exceeds the cost of adding a replaceable SPD. Roadway lighting, tunnels, airports, stadiums, parking areas, industrial sites, architectural facades, ports, and smart poles therefore show substantially higher attachment rates than residential or ordinary indoor luminaires. High LED penetration does not eliminate growth potential. Early generations of widely deployed LED fixtures are beginning to enter replacement and refurbishment cycles, while connected-lighting architectures introduce additional surge entry points through DALI, 0/10 V, DMX, communication, sensing, and control wiring. International Energy Agency and United States Department of Energy materials continue to emphasize efficient, connected, and smarter lighting as an important part of building and infrastructure modernization. This suggests that future SPD growth will increasingly be driven by replacement demand, upgrades from basic 6 kV protection to 10/20 kA external modules, multi-stage coordination, and protection of control interfaces rather than solely by first-time conversion from conventional lamps to LEDs. Under these conditions, the global market is projected to reach USD 329.58 million in 2026 and approximately USD 471.50 million in 2032, corresponding to a 2026-2032 CAGR of 6.15%.

Product competition is moving beyond basic parallel MOV modules toward thermally

protected designs, lower residual voltage, safer end-of-life disconnection, improved temporary-overvoltage behavior, combined Type 2+3 performance, IP66/IP67 housings, status indication, and coordinated protection of both mains and control circuits. CITEL's expansion into combined AC and DALI, 0-10 V, or DMX protection illustrates the growing importance of connected-lighting interfaces, while Transtector's recent AC SPD expansion demonstrates continuing product investment in the North American LED-lighting segment. Industry consolidation has already influenced the competitive landscape: Mersen's acquisition of Cirprotec and the Chinese overvoltage-protection company ASP combined European IEC expertise, surge-test capabilities, Asian manufacturing, and a broader commercial network. Similar combinations of certified technology, regional production, and OEM access are likely to remain strategically attractive. Integration of surge protection into higher-performance LED drivers will place continuing pressure on inexpensive standalone modules in low-risk applications, but it is unlikely to eliminate external SPDs in exposed infrastructure. Replaceability, visual or remote condition indication, coordinated protection, and the ability to handle energy levels beyond the practical limits of a driver PCB remain important. Suppliers that combine certified performance, reliable thermal disconnection, control-line protection, flexible OEM customization, and regional technical support are consequently positioned to outperform the overall market.

This report studies the global LED Lighting Surge Protective Devices production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for LED Lighting Surge Protective Devices and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of LED Lighting Surge Protective Devices that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global LED Lighting Surge Protective Devices total production and demand, 2021-2032, (K Units)

Global LED Lighting Surge Protective Devices total production value, 2021-2032, (USD Million)

Global LED Lighting Surge Protective Devices production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global LED Lighting Surge Protective Devices consumption by region & country, CAGR,

2021-2032 & (K Units)

U.S. VS China: LED Lighting Surge Protective Devices domestic production, consumption, key domestic manufacturers and share

Global LED Lighting Surge Protective Devices production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global LED Lighting Surge Protective Devices production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global LED Lighting Surge Protective Devices production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global LED Lighting Surge Protective Devices market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Littelfuse, Inc., Mersen S.A., CITEL, DEHN SE, Eaton Corporation plc, Signify N.V., OBO Bettermann, DITEK Surge Protection, Hatch Lighting, Inc., Prosurge Electronics Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World LED Lighting Surge Protective Devices market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global LED Lighting Surge Protective Devices Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global LED Lighting Surge Protective Devices Market, Segmentation by Type:

Driver-Adjacent SPD

Junction-Box SPD

Others

Global LED Lighting Surge Protective Devices Market, Segmentation by Electrical Interface:

AC Mains SPD

Low-Voltage DC SPD

Others

Global LED Lighting Surge Protective Devices Market, Segmentation by Nominal Discharge Current:

Low Discharge Current Type: In $\leq$ 10 KA

Medium Discharge Current Type: 10 KA

High Discharge Current Type: In $>$ 25 KA

Global LED Lighting Surge Protective Devices Market, Segmentation by Application:

Municipal Infrastructure

Commercial Buildings

Industrial Settings

Others

Companies Profiled:

Littelfuse, Inc.

Mersen S.A.

CITEL

DEHN SE

Eaton Corporation plc

Signify N.V.

OBO Bettermann

DITEK Surge Protection

Hatch Lighting, Inc.

Prosurge Electronics Co., Ltd.

MEAN WELL ENTERPRISES CO., LTD.

SALTEK s.r.o.

Finder S.p.A.

HAKEL spol. s r.o.

ZOTUP S.r.l.

Transtector Systems

Xiamen SET Electronics Co., Ltd.

GRE Alpha Electronics Ltd.

FATECH Electronic Ltd.

Aplicaciones Tecnológicas, S.A.

RUILON

Key Questions Answered:

1. How big is the global LED Lighting Surge Protective Devices market?
2. What is the demand of the global LED Lighting Surge Protective Devices market?
3. What is the year over year growth of the global LED Lighting Surge Protective Devices market?
4. What is the production and production value of the global LED Lighting Surge Protective Devices market?
5. Who are the key producers in the global LED Lighting Surge Protective Devices market?
6. What are the growth factors driving the market demand?

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