

Automotive Lighting Market for ICE & Electric Vehicle by Technology (Halogen, LED, Xenon), Position and Application (Front, Rear, Side, Interior), Adaptive Lighting, Electric Vehicle, Two-Wheeler Position Type and Region - Global Forecast to 2030

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Abstracts

The Automotive Lighting Market is estimated to grow from USD 22.5 billion in 2023 to USD 30.4 billion by 2030 at a CAGR of 4.4% during the forecast period.

Increasing production of mid-priced cars equipped with LED lighting, growing luxury car & SUV sales in developed countries, and increased focus on on-road safety persuade OEMs to focus on innovation and advancement in automotive lighting.

"Passenger cars are to be the largest automotive lighting market."

The passenger car segment is estimated to be the most promising and fastest-growing segment for automotive lighting. The growth is mainly attributed to the highest share of the passenger cars segment, with more than 70% in overall vehicle production. To attract more customers, automotive OEMs offer connected LED headlamps and taillamps starting from mid-priced cars. Furthermore, this segment allows OEMs to push their boundaries by developing and installing cutting-edge technologies without compromising vehicle safety and style. The penetration of ambient lighting features is expanding beyond luxury and premium segments, with mid-range models like Kia Soul, Mini Hardtop, and Chevrolet Camaro increasingly incorporating this feature. Passenger car segment D, led by luxury and premium offerings like Mercedes-Maybach S-Class and BMW X7, is projected to dominate the market in the coming years. This trend, coupled with the expected growth in the production of larger SUV models like the Hyundai Palisade, is expected to propel the technological advancement in interior lighting of the vehicles. For instance, OEMs are deploying advanced driver assistance

systems (ADAS) to increase vehicle sales, which will prompt the growth of adaptive lighting systems in passenger cars. Most passenger vehicles that fall in Class D and above are mostly installed with adaptive lighting technology. European and North American countries have higher demand for SUVs and the luxury vehicle segment, which have starting costs of more than USD 45,000 and are equipped with high-end technologies for smart matrix LED or OLED headlamps, laser lights, tail lamps, adaptive high Beam Assist, auto on/off, bending/cornering, and ambient lighting. Some models like the Alfa Romeo Giulia, Audi A4, BMW 3 Series, Ford Mondeo, and Lexus IS, among others, are equipped with advanced lighting systems. Thus, the growing demand for premium and luxury cars loaded with advanced features will spur the adoption of advanced lighting technologies in the passenger cars segment.

"Ambient lighting will be the fastest developing automotive adaptive lighting market during the forecast period."

Factors such as increasing adoption of LED-based lighting in C, D, and above segment cars to provide more personalized and distinct features, rising adoption of mood lighting, and growing acceptance of multicolor ambient lighting in premium cars are driving the ambient light market. OEMs are trying to accommodate luxury features, such as ambient lighting, infotainment units, and exotic interior design in lower to mid-range cars to attract more consumers. Some new cars are offered with ambient lighting for various applications, such as center consoles, dashboards, headliners, footwells, doors, and armrests, among others. These ambient lights are decorative and boost the cabin feel and ambiance. Further, luxury cars such as Mercedes-Benz, BMW, Audi, Lexus, Porsche, and Land Rover, among others, offer vibrant and attractive ambient lighting options for their modern car models. Improving the economic condition of developing regions such as Asia Oceania with rising acceptance of Class C, D, and high-range cars loaded with ultra-luxurious features will allow the ambient lighting market to boost at the fastest rate under the review period.

"Asia Pacific is the prominent region in the automotive lighting market."

Asia Pacific is estimated to be the largest market for automotive lighting during the forecast period. The Asia Pacific region has emerged as a hub for automotive production in recent years and holds the largest share in global vehicle production, with more than 60% in 2023. Also, growing demand for premium and luxury cars and increasing sales of electric vehicles in countries like China, India, and Japan are propelling the growth of automotive lighting. China and Japan are leading the automotive lighting market, followed by India and South Korea during the forecast period. The growing SUV market in the Asia Pacific region is driving a significant increase in demand for automotive lighting, particularly with features such as LED lights,

adaptive headlamps, and integrated infotainment consoles often paired with ambient lighting. This trend is particularly pronounced in the full-size SUV segment, contributing substantially to the projected growth of the regional automotive lighting market.

China has emerged as a key market for premium vehicles. LED lighting in passenger cars in China is increasing due to the growing popularity of premium and luxury cars. To take this as a growth opportunity, lighting manufacturers are partnering with Chinese players and expanding their businesses in the Chinese market. For instance, Hella opened a second manufacturing unit with Minth Group in Jianxing, China. Also, Hella partnered with Wuling Automotive Industry to work together on automotive lighting technologies for the Chinese market, focusing on developing headlamps for the volume segment. Through these agreements and expansions, Hella can focus more on the untapped market in China. Also, In Japan, automakers must equip all new vehicles sold in Japan with automatic headlamps, making it likely the first country in the world with such a mandate. The move mandating headlamps with an automatic on function was implemented on April 1, 2020.

Many global manufacturers of lighting have a strong presence in the Asia Pacific region, such as Koito Manufacturing, HELLA GmbH, Valeo, Magnetic Marelli, Stanley Electric, Pvt. Ltd.,

The break-up of the profile of primary participants in the automotive lighting market:

By Companies: Lighting Manufacturers - 55%, Tier 2 Suppliers - 30%, OEMs - 15%

By Designation: Directors- 15%, C-Level Executives - 60%, Others - 25%

By Region: North America - 10%, Europe - 10%, Asia Pacific - 75%, and RoW – 5%

Global players dominate the Automotive Lighting Market and comprise several regional players. The key players in the automotive lighting market are Koito Manufacturing Co., Ltd. (Japan), Magnetic Marelli (Italy), Valeo (France), HELLA GmbH & Co. KGaA (Germany) and Stanley Electric Co., Ltd. (Japan).

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall Automotive Lighting market and the sub-segments. This report will help stakeholders understand the competitive

landscape and gain insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing demand for luxury vehicles, Lighting regulations for better visibility and safety, and the rising demand for adaptive lighting in passenger cars), restraints (high cost of LED lighting and low penetration of adaptive lighting in hatchback and compact sedans), opportunities (Increasing adoption of LED lighting and partnership between automotive OEMs and lighting system manufacturers), and challenges (less penetration of advanced lighting in commercial vehicles and volatility of raw material prices) influencing the growth of the Automotive Lighting Market.

Product Development/Innovation: Detailed insights on upcoming technologies and new product & service launches in the Automotive Lighting Market.

Market Development: Comprehensive market information – the report analyses the authentication and brand protection market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in Automotive Lighting Market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Koito Manufacturing Co., Ltd. (Japan), Magneti Marelli (Italy), Valeo (France), HELLA GmbH & Co. KGaA (Germany) and Stanley Electric Co., Ltd. (Japan) among others in Automotive Lighting Market.

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TABLE 235 BENDING/CORNERING LIGHTING MARKET, BY REGION, 2018–2022
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TABLE 236 BENDING/CORNERING LIGHTING MARKET, BY REGION, 2023–2030
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11.1.1 INDUSTRY INSIGHTS

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TABLE 271 ELECTRIC VEHICLES LIGHTING MARKET, BY TECHNOLOGY, 2018–2022 (USD MILLION)

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11.2.1 GROWING ADOPTION OF LED TO IMPACT HALOGEN MARKET

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TABLE 279 LED: ELECTRIC VEHICLE LIGHTING MARKET, BY REGION, 2018–2022

(USD MILLION)

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TABLE 283 XENON/HID: ELECTRIC VEHICLE LIGHTING MARKET, BY REGION,
2018–2022 (USD MILLION)

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TABLE 287 ELECTRIC VEHICLE EXTERIOR LIGHTING MARKET, BY APPLICATION,
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TABLE 291 ELECTRIC VEHICLE HEADLIGHTS MARKET, BY REGION, 2018–2022

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TABLE 292 ELECTRIC VEHICLE HEADLIGHTS MARKET, BY REGION, 2023–2030

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TABLE 294 ELECTRIC VEHICLE FOG LIGHTS MARKET, BY REGION, 2023–2030

(MILLION UNITS)

TABLE 295 ELECTRIC VEHICLE FOG LIGHTS MARKET, BY REGION, 2018–2022

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