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Smart Lighting Market by Installation Type (New Installations, Retrofit Installations), Offering (Hardware, Software, Services), End-use Application (Indoor, Outdoor), Communication Technology (Wired, Wireless) and Region - Global Forecast to 2029

https://marketpublishers.com/r/G43A414E8CBEN.html
Date: April 2024
Pages: 242
Price: US$ 4,950.00 (Single User License)
ID: G43A414E8CBEN

Abstracts

The smart lighting market is expected to reach USD 18.0 billion by 2029 from USD 9.5 billion in 2024, at a CAGR of 13.8% during the 2024-2029 period.

The residential segment of the smart lighting market is witnessing remarkable growth, propelled by several key factors. The increasing demand for energy-efficient solutions, the widespread integration of smart technologies into homes, and the rising popularity of connected homes and IoT devices are driving this upward trajectory. As consumers increasingly prioritize convenience, customization, and energy savings in their living spaces, the adoption of smart lighting systems is expected to soar. These systems offer a plethora of benefits, including remote control, scheduling, ambiance customization, and enhanced energy efficiency.

Leading companies such as Zumtobel Group, Signify Holding, and ACUITY BRANDS INC. are actively involved in delivering smart lighting solutions tailored for residential applications, catering to the escalating demand for intelligent lighting systems in homes. Looking ahead, the future of smart lighting in residential settings appears promising, buoyed by ongoing technological advancements, seamless integration with IoT devices, and the proliferation of sustainable lighting solutions. These factors are driving innovation and growth in the residential segment of the smart lighting market.

“Rising adoption of LED lights and luminaries in outdoor applications to increase in the demand of smart lighting marker.”

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The primary reason for opting for LEDs instead of traditional lighting systems encompasses both energy conservation and cost reduction. LEDs are progressively displacing conventional light sources like fluorescent, high-intensity discharge (HID), incandescent, and high-pressure sodium lamps, particularly in outdoor lighting contexts such as highways, roadways, public areas, and sports stadiums. According to the US Department of Energy (DOE), LED lighting is projected to constitute 86% of all lighting sales by 2035, attributing this shift to the myriad benefits LEDs offer over their conventional counterparts.

While LEDs inherently offer energy efficiency, without proper controls. By integrating lighting control systems with LEDs, the lifespan of LED light sources can be prolonged, thereby diminishing maintenance expenses and further shortening the payback period. Consequently, LED lighting solutions equipped with dynamic lighting control systems hold the potential to curtail overall lighting energy consumption significantly. These advantages have spurred construction firms engaged in projects involving the construction of highways and stadiums to adopt LED lighting systems.

“Services segment of smart lighting market projected to record the highest CAGR during the forecast period.”

Advancements in lighting technology have facilitated the emergence of the Internet of Things (IoT), meeting the growing demand for new networks in the lighting industry. This trend presents an opportunity for lighting manufacturers to compete with traditional networking players while also developing their own service segments. Within the services sector, offerings include pre-installation and post-installation services. The anticipated high adoption rate of smart street lighting systems for energy conservation and ecological safety is a key driver for the growth of the smart lighting services market during the forecast period.

In contemporary lighting technology, there exists a broad spectrum of functionalities beyond basic illumination provision.

Signify Holding offers smart lighting services encompass several aspects including assessment of existing lighting setups, development of customized lighting plans, maintenance solutions, remote support, and assurance of lighting performance.

“Germany is expected to have the largest market share of smart lighting in Europe market in the forecast period.”

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Germany's robust economy, high living standards, and governmental emphasis on reducing carbon emissions are pivotal factors propelling the growth of the smart lighting market. As one of the foremost countries in technology globally, Germany is poised for significant economic advancement in the foreseeable future.

Over the next 4-5 years, an increase in the number of commercial spaces is anticipated, fostering the demand for novel lighting solutions. Government directives mandating the phasing out of outdated, inefficient lighting technologies, coupled with declining LED prices, serve as primary drivers of the smart lighting market's expansion in the country. The proliferation of smart connected devices notably fuels market growth in Germany.

In February 2023, Zumtobel Group collaborated with Haufe Deckensysteme (Germany) has implemented a distinctive illuminated ceiling system. It boasts not only aesthetic appeal but also advanced functionality. Within this system, lighting, heating, cooling, and acoustics are seamlessly integrated, offering a cutting-edge, energy-efficient, and adaptable solution. Beyond public areas and offices, Zumtobel Group has outfitted the new high-bay warehouse, laboratory, technology center, and shipping area with contemporary luminaire.

In April 2021, ams-OSRAM AG (Austria), introduced the advanced OTI DALI DT6/DT8 indoor LED driver family, renowned for its enhanced power and efficiency. This latest product iteration conforms to the current DALI-2 standard, ensuring consistent certification. Additionally, Osram unveiled the second generation of its PrevaLED COIN COB range, featuring the new PrevaLED COIN 50 and 111 COB G2 models, effectively complementing the existing product lineup.

In October 2020, In collaboration with BOSCH Smart Home (Germany), LEDVANCE GmbH introduced two meticulously coordinated product bundles aimed at enhancing security within the smart home environment. LEDVANCE's SMART+ products seamlessly integrate into the BOSCH Smart Home System, ensuring straightforward setup and operation of the starter sets for end customers. The inclusion of essential accessories such as a separate bridge is not required, streamlining the user experience.

In July 2020, ams, a leading global provider of high-performance sensor solutions, has successfully concluded the acquisition of OSRAM Licht AG (OSRAM) (Germany). The takeover offer was fully settled in July 2020, with the offer price being paid to the holders of the tendered shares. Following the completion of the acquisition, ams now holds 69% of all shares in OSRAM (excluding treasury shares), which were acquired

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through the takeover offer and additional purchases amounting to a transaction value of approximately EUR 2.7 billion. As the majority shareholder of OSRAM, ams anticipates securing representation on the Supervisory Board of OSRAM based on its shareholding soon. Further steps toward integrating the two companies will be announced by ams in the near future.

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

By Company Type: Tier 1 – 30%, Tier 2 – 50%, Tier 3 – 20%

By Designation Type: C Level – 25%, Director Level – 35%, Others – 40%

By Region Type: North America – 35%, Europe –30 %, Asia Pacific – 25%, RoW – 10%,

The major players in the smart lighting market are Signify Holding (Netherlands), Legrand (France), ACUITY BRANDS, INC. (US), ams-OSRAM AG (Austria), Honeywell International Inc. (US), Zumtobel Group (Austria), Wipro Lighting (India), Lutron Electronics Co., Inc (US), IDEAL INDUSTRIES, INC. (US) (Cree Lighting), LEDVANCE GmbH (Germany), Current (US), Savant Systems, Inc (US), Inter IKEA Systems B.V. (Netherlands), Dialight (UK), Schneider Electric (France), ABB (Switzerland), Lightwave (UK), RAB Lighting Inc. (US), Synapse Wireless Inc. (US), Panasonic Corporation (Japan), Leviton Manufacturing Co., Inc. (US), Syska (India), BUILDING ROBOTICS INC. (BRI), A SIEMENS COMPANY (US), Helvar (Finland), LIFX (US), Nanoleaf (Canada), Sengled GmbH (Germany), and TVILIGHT Projects B.V. (Netherlands).

Research Coverage

The report segments the smart lighting market and forecasts its size based and region. The report also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report also covers qualitative aspects in addition to the quantitative aspects of the market.

Reasons to buy the report:

The report will help the market leaders/new entrants in this market with information on the closest approximate revenues for the overall smart lighting market and related segments. This report will help stakeholders understand the competitive landscape and

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gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (incorporation of data analytics and API event generation), restraints (elevated initial expenses of smart lighting equipment and accessories), opportunities (emerging smart office and smart retail trends), and challenges (interoperability challenge between multiple network components)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the smart lighting market

Market Development: Comprehensive information about lucrative markets – the report analyses the smart lighting market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the smart lighting market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Signify Holding (Netherlands), ACUITY BRANDS, INC. (US), Zumtobel Group (Austria), ams-OSRAM AG (Austria), and Panasonic Corporation (Japan)

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