

# **Smart Lighting Market with COVID-19 Impact Analysis by Offering (Hardware, Software and Services), Installation Type (New Installations and Retrofit Installations), End Use Application, Communication Technology, and Geography - Global Forecast to 2026**

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## **Abstracts**

The smart lighting market is projected to reach USD 27.7 billion by 2026 from USD 10.9 billion in 2021; it is expected to grow at a CAGR of 20.5% from 2021 to 2026. Europe has the largest market share for smart lighting. Whereas, APAC has the highest growth rate and is expected to grow at the highest CAGR during the forecast period owing to the rapidly changing face of technology and customer needs in high-potential markets such as China, Japan, South Korea, and Australia. Due to advancements in technology and the emergence of new business models as well as new constructions in the developing cities of the region, the smart lighting market is exhibiting an upbeat outlook. The booming commercial and industrial sectors would further fuel the adoption of smart lightings in APAC. Furthermore, growth in end-use sectors and mounting investments from government bodies are also favoring the growth of the smart lighting market in the region.

The lights and luminaires segment, in market by hardware, of the smart lighting market is projected to hold a larger share during the forecast period

The market for lights and luminaires accounted for a larger share of in 2020. Improved smart standards coupled with the growing demand for high input-powered devices for lighting are driving the said market. OEMs are coming up with integrated solutions in luminaires, which require more input power. Lights and luminaires broadly include smart bulbs, lamps, and luminaires such as fluorescent lights, light-emitting diodes (LEDs), and high-intensity discharge lamps (HIDs). The performance and characteristics of the

light source used in lamps depend on the lighting task being performed. Choosing the right lamp type helps save energy to a great extent. Smart LED luminaires are cost-effective and offer a high return on investment. They reduce installation costs and are safer since conduits and metal cladding are not required. The benefits provided by smart technology make LED lighting systems a very attractive option for property owners. LED lighting is one of the mainstream technologies offering competitive cost and energy efficiency benefits.

In end use applications, the indoor segment is projected to hold the largest share of the smart lighting market during the forecast period

The indoor segment accounted for the largest share of the smart lighting market in 2020. Growing affordability and higher efficiencies are driving the use of smart lighting in commercial, industrial, and residential buildings. The dominance is attributed to the growing consumer awareness about smart lighting and the adoption of energy-efficient products in the smart lighting market. However, the high implementation cost of these solutions is one of the major factors inhibiting the growth of the market in the residential segment. APAC accounts for a large share of global construction investments, in which a significant portion is invested in the lighting industry, especially for the indoor segment. This factor is expected to drive the smart lighting market for indoor end-use application in APAC at the highest CAGR during the forecast period.

The smart lighting market in APAC is projected to have the highest CARG during the forecast period (2021-2026)

The smart lighting market in APAC comprises China, Japan, Australia, India and the Rest of APAC, which primarily includes South Korea, Indonesia, Singapore, Taiwan, Malaysia, Thailand, Vietnam, Bangladesh and the Philippines. This region is expected to have the highest CAGR during the forecast period. It is expected to be the fastest-growing market for smart lighting during the forecast period. The smart lighting market has enormous growth potential in this region, as connected lighting systems are rapidly being adopted in various applications, especially in smart offices/workspaces. Increasing construction activities in Asia Pacific are contributing significantly to the growth of the smart lighting market in the region. There are several new opportunities for energy-efficient lighting and advanced lighting systems in the next few years as ~200 million homes, and 18 million homes are expected to be constructed in China and India, respectively. The increasing number of smart city and smart infrastructure projects undertaken by the governments will create several opportunities for energy-efficient lighting and advanced lighting systems in the next few years. In addition,

government initiatives for offering low-cost LED lights at subsidized prices are expected to contribute majorly to the accelerated growth of the Asia Pacific smart lighting market.

China is expected to lead the smart lighting market in APAC owing to the availability of cost-effective land for setting up manufacturing plants as well as for new constructions of commercial spaces, presence of multiple lighting manufacturers, and continuing growth in commercial and industrial buildings as well as smart offices. The country has expertise in manufacturing lighting equipment and adopts technologies at a faster rate than other nations in the region. Rapid economic growth in China, India, Japan, and the Rest of APAC is expected to propel the APAC smart lighting market in the coming years.

Breakdown of profiles of primary participants:

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

By Designation: C-level Executives = 25%, Directors = 35%, and Others = 40%

By Region: North America = 50%, Europe = 20%, APAC = 25%, and RoW = 5%

The major companies in the smart lighting market are Signify (Philips Lighting) (Netherlands), Legrand S.A. (France), Acuity Brands, Inc. (US), Lutron Electronics (US), Leviton Manufacturing Company, Inc. (US), Zumtobel Group (Austria), Honeywell International Inc. (US), Hubbell Incorporated (US), and GE Current (US). Other players operating in the smart lighting market include Dialight PLC (UK), Helvar (Finland), Ideal Industries, Inc. (Cree Lighting) (US), Adesto Technologies (Echelon Corporation) (US), Panasonic (Japan), LightwaveRF PLC (UK), RAB Lighting (US), Synapse Wireless (US), Syska LED (India), Wipro Enterprise Ltd (India), LG Electronics (South Korea), ABB (Switzerland), Savant Systems Inc. (GE Lighting) (US), and Enlighted Inc (a Siemens company)(US).

Research Coverage:

This report segments the smart lighting market with COVID-19 Impact Analysis by Installation Type (New Installations and Retrofit Installations), Offering (Hardware, Software and Services), End Use Application (Indoor and Outdoor), Communication Technology (Wired and Wireless) and Geography - Global Forecast to 2026

## Reasons to Buy the Report:

This report includes statistics pertaining to the smart lighting market based on offering, installation type, end use application, communication technology and region, along with their respective market sizes

Major drivers, restraints, opportunities, and challenges for the smart lighting market have been provided in detail in this report

The report includes illustrative segmentation, analysis, and forecast for the smart lighting market based on its segments.

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\*Details on Business overview, Products/Solutions/Services offered, Recent Developments, SWOT Analysis, MNM view might not be captured in case of unlisted companies.

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## About

According to the new market research report "Smart Lighting Market by Offering (Hardware (Lights & Luminaires, Lighting Controls), Software, and Services), Communication Technology (Wired and Wireless), Installation Type, Application Type, and Geography - Global Forecast to 2023", The smart lighting market is estimated to grow from USD 7.93 Billion in 2018 to USD 20.98 Billion by 2023, at a CAGR of 21.50% between 2018 and 2023. The major factors driving the growth of the smart lighting market include modernization and development of infrastructure to transform cities into smart cities, need for energy-efficient lighting systems, increasing adoption and decreasing cost of LEDs, increased demand for intelligent solutions for street lighting systems, and growing awareness about energy savings among consumers and governments worldwide.

### **Some of the major players in the smart lighting market are**

Philips Lighting (Netherlands)

Hafele Group (Germany)

Acuity Brands (US)

OSRAM (Germany)

Cree (US)

Hubbell (US)

Zumtobel Group (Austria)

Honeywell (US)

Legrand (France)

Eaton (Ireland)

Lutron Electronics (US)

## General Electric (US)

### **Smart lighting market for services to grow at highest CAGR between 2018 and 2023**

Services play a major role before and after the installation of smart lighting systems. This segment comprises design and engineering services, installation service, and post-installation services (maintenance, and support and monitoring services). The growth of the smart lighting market for services is mainly attributed to the expected high rate of adoption of smart street lighting systems for energy conservation and ecological safety during the forecast period. Post-installation services consist of maintenance, support, and monitoring services for smart lighting systems. Among these, maintenance and support services require high expenditure. Post-installation services consist of maintenance and support for smart lighting systems to ensure long life of the luminaires and lamps, with minimum energy consumption and maximum efficiency.

### **Indoor application to hold larger share of smart lighting market by 2023**

Indoor application (residential, commercial, and industrial) is expected to hold a larger size of the smart lighting market during the forecast period. In residential applications, smart lighting can be installed according to the requirement of a particular room or an entire house. The incorporation of wireless technology in smart lightings would help the market for residential indoor application to grow at a high rate. The commercial application of smart lighting includes the implementation of these lightings in offices, retail shops, shopping malls, and hospitality infrastructure. Reducing energy consumption has become a major objective for building owners, governments, utilities, and other stakeholders. Replacing existing lights with more energy-efficient lighting sources, such as LEDs, is one of the ways to reduce massive energy consumption; however, it is a small-scale solution for the issue. On a large scale, energy consumption can be reduced by turning the lights off when not required, optimizing light levels to suit the workers occupants needs, and reducing the overall demand for lighting energy. These measures come under smart lighting arrangement, which is the best way to ensure the automatic reduction in energy consumed in the lighting task.

### **Smart lighting market for wireless connectivity to grow at higher CAGR between 2018 and 2023**

The use of lightings based on wireless technology eliminates the wire usage, thereby

abolishing the need for installation and protection of cables. Therefore, the wireless smart lighting systems have significantly low cost. Also, the wireless system is flexible in nature. Thus, sensors equipped with wireless communication can be organized into an autonomous network, which makes updating, adding, moving, and replacing of sensors easy after the initial installation. The developments in wireless technologies are expected to drive the growth of the smart lighting market for the wireless communication protocols.

### **APAC to hold largest share of smart lighting market by 2023**

The smart lighting market in APAC is expected to grow at the highest CAGR during the forecast period. The region provides the enormous growth potential for the market players, and these smart lighting systems are likely to be accepted by consumers as an integral part of a digitalized household. The increased construction activities in APAC are contributing significantly to the growth of the smart lighting market in the region. The expected construction of ~200 million homes in China and 18 million homes in India is likely to provide several new opportunities for energy-efficient lighting and home automation in the next few years in this region. Moreover, the emerging economies of China and India are having a positive impact on the overall market in APAC. Rising government expenditure on public infrastructure, increasing adoption of energy-efficient lighting systems are the major driving factors for the growth of smart lighting in APAC.

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