

France LED Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The France LED Lighting Market size is estimated at 2.00 billion USD in 2024, and is expected to reach 3.07 billion USD by 2030, growing at a CAGR of 7.43% during the forecast period (2024-2030).

Increasing developments in the industrial and residential segments, along with FDI flows in the commercial office segment, driving the market's growth

In terms of value share, in 2023, industrial and warehouse accounted for the majority share among indoor lighting segments. The COVID-19 pandemic seems to have accelerated France's efforts to return industrial production capacities to the country. French industrial production increased by 1.1% over one month in December 2022, after +2% in November 2022. Manufacturing output rose by 0.3% M-o-M in December 2022, after +2.4% in November 2022. While the market in this segment is saturating in terms of LED demand, the growth in the segment with an increasing number of warehouses is expected to continue boosting the demand.

In terms of volume, in 2023, residential accounted for the highest share. Residential construction activity has been showing mixed results in recent years. In the first 11 months of 2022, new dwellings authorized in France, excluding Mayotte, rose by 5.6% Y-o-Y to 448,416 units, following an 18.5% Y-o-Y increase in 2021. During 2023, house prices in France were expected to stabilize a bit (perhaps growth would drop below 5%), and the number of property sales would remain just above 1 million during the year. Since the COVID-19 pandemic-induced confinements, many people have moved from the major cities to the provinces in France. The market in the residential indoor lighting

segment is expected to get more stable over the coming years.

The office segment's share was expected to increase from 2023 after declining during the pandemic due to WFH conditions and low development and sales. After dropping due to the COVID-19 pandemic, FDI flows to France rebounded in 2021 (+191.4%) but remained below pre-crisis levels. In 2022, FDI projects increased by 3% (1,259 projects) in France. Rebound sales in the office segment are expected to increase demand for LEDs.

France LED Lighting Market Trends

Increasing passenger car and battery electric private and utility car registrations to drive the growth of the LED market

France's total population has been growing for years, which reached 67.64 million in 2021. The fertility rate in France looks to be 1.83 children for every woman. The overall life expectancy at birth in France was expected to be 82.32 years in 2021. Over the years, the nation's rate has remained consistent. The death rate in France fell by 0.2 per 1,000 people (-2.02%) in 2021 compared to 2020. Overall, the death rate decreased, falling to 9.7 deaths per 1,000 people in 2021. According to the data, there are more people, which means that they will need more space to live in, which will help the market to expand.

In France, there will be about 31 million households in 2021. In France, there are 2.19 individuals in each family on average as of 2018. In France, as of the fourth quarter of 2021, there were over 29,712 new dwelling units that had been sold or reserved for sale. There were around 27,918 completed or scheduled house sales in the fourth quarter of 2020. More LED usage will be made possible by the rise in the number of homes sold.

As of January 2022, there will be more than 38.7 million passenger vehicles in the French fleet, up from over 35.8 million in 2011. Up to 2022, the number of passenger vehicles on the road increased continuously. Additionally, since electric passenger car registrations first appeared on the French automobile market, they have dramatically increased. Nearly 219,800 new battery-powered electric private and utility cars were registered in France in 2022. This was an increase of almost 26.1% from the previous year. The sale of LEDs in France will benefit from the rise in automotive vehicle sales.

High per capita income and energy saving scheme to promote the use of LED lights

The average household size is 2.2 people per household in France in 2022. The current population of France is 65.7 million as of June 2023, increasing at a slow pace of around 0.2% yearly. 81.5 % of the population is urban (53.2 million people in 2020). Thus, the increase in population is expected to create more LED penetration and increase the need for illumination in the country.

Between 2017 and 2020, the homeownership rate in Germany decreased slightly. In 2021, about 64.7% of the population lived in an owner-occupied dwelling, and in 2022, it reached 63.4%. This makes France one of the countries with the highest homeownership rate, but in coming years, it is expected to decline slowly, and the lowest rental residential real estate market is expected to grow further in the country. These instances suggest that LED penetration is there, but the penetration is less compared to previous years in the residential segment.

In France, disposable income is high, which results in the rising spending power of individuals and affording more money on new residential spaces. France's per Capita income reached USD 25,337.71 in December 2022, compared to USD 27,184.2 in December 2021. Compared to some developed nations, it has high purchasing power. For instance, Brazil had USD 7732.4 as of 2021, and Italy had USD 15,321.9 as of 2017, which is lower.

In June 2017, the French government announced the Energy Savings Certificate scheme, which allows people to get subsidies that can cover up to 100% of the price of LED bulbs based on the householder's income. Such instances are further expected to surge the demand for LED lighting in the country.

France LED Lighting Industry Overview

The France LED Lighting Market is fragmented, with the top five companies occupying 25.89%. The major players in this market are LEDVANCE GmbH (MLS Co. Ltd), Marelli Holdings Co. Ltd, OSRAM GmbH., Signify (Philips) and Thorn Lighting Ltd. (Zumtobel Group) (sorted alphabetically).

Additional Benefits:

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