

# Middle East and Africa Outdoor LED Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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## Abstracts

The Middle East and Africa Outdoor LED Lighting Market size is estimated at 0.88 billion USD in 2024, and is expected to reach 1.14 billion USD by 2030, growing at a CAGR of 4.54% during the forecast period (2024-2030).

The increasing road network and the upgradation of stadiums drive the market's growth

In terms of value share, in 2023, public places accounted for the majority of the share (55.1%), followed by streets and roads (44.9%). The market share is expected to be low in public places and high in streets and roads in the coming years. In 2020, public places such as stadiums, beaches, and forts were shut down throughout the region to limit the spread of COVID-19. There was a halt in the construction of parks and stadium facilities. In 2021, the Middle East & Africa relaxed COVID rules. The Miral revealed that in 2023, SeaWorld Abu Dhabi is expected to open. The new next-generation marine life park on Yas Island was 90% complete, with building work set to finish by the end of 2022.

Spending on road infrastructure has been a major driver of growth in the region, and the government continues to make critical investments for social and economic development. Major regional projects included Dubai's allocation of AED 15 billion (USD 4.8 billion) to complete key projects for the Expo 2020, including road and viaduct upgrades. More than USD 1.14 trillion has been invested in Saudi Arabia's road projects.

Over the last few years, there have been many changes in the sports sector. For example, in 2015, Clay Paky lit up Saudi Arabia's soccer stadium with LEDs. In 2022, Khalifa International Stadium was equipped with LED lights of Philips lighting. These improvements were needed to host games in the quarter-finals of Qatar's 2022 FIFA World Cup. In 2022, more than 4,000 lighting devices, including emergency lights and exit signs, were put in place within the stadium of Ras Abu Aboud. The above instances are expected to boost the outdoor lighting segment in the region.

## Middle East and Africa Outdoor LED Lighting Market Trends

### Renovation and construction of new sports stadiums to facilitate the growth of LED lights

The number of stadiums witnessed a growth from 227 units in 2022 to 255 units in 2030, registering a CAGR of 1.4%. The sports sector has undergone several changes in recent years. For instance, Clay Paky lit up the King Fahd International Stadium in Saudi Arabia using LEDs in 2015. The Khalifa International Stadium used LED lighting by Philips Lighting in 2022. To host games up to the quarterfinals of the Qatar 2022 FIFA World Cup, the upgrades were necessary. Within Ras Abu Aboud Stadium, more than 4,000 different luminaires, including emergency luminaires and exit signs, were erected in 2022. These elements support the expansion of the LED market in the area.

The Sports Ministry of Saudi Arabia is making impressive progress in building sports infrastructure. The country planned to invest SAR 10.1 billion (USD 2.7 billion) in constructing advanced stadiums to host FIFA, a widely recognized sporting event, by 2023. The new stadium project in Riyadh stands out for its sustainability measures, which include using LED lights in the stadiums.

The Saudi Arabian Sports Ministry started a SAR 10.1 billion (USD 2.7 billion) program in 2023 to construct new sporting facilities and renovate those that already exist. According to the Saudi Arabian Ministry of Sports, the initiatives will be a part of Saudi Arabia's joint candidature with Egypt and Greece to host the FIFA World Cup in 2030. The Saudi Arabian Football Federation (SAFF) announced in 2023 that Saudi Arabia would construct three new stadiums in Riyadh, Al-Khobar, and Dammam in time for the 2027 Asian Cup. Thus, LED light sales are anticipated to increase nationwide as a result of the building of new stadiums and an increase in athletic events.

Increase in household size to bolster the growth of LED usage in the region

The Middle East & Africa had a population of 484 million people as of 2018, with that number predicted to climb to around 500 million by 2030. In 2020, over 92.8 thousand homes were built in the emirate of Abu Dhabi, followed by 41 thousand in the emirate of Sharjah and 35 thousand in the emirate of Dubai. There are expected to be 231.2 thousand residences in the entire United Arab Emirates over the coming years. The building of new rooms will consequently boost sales of LEDs.

In the Middle East and Africa, the typical household size exceeds five people. In Saudi Arabia, about half of the population owns a home, with 5.46 million households counted in the country. In Israel, there were 681.5 thousand homes with five or more people as of 2020. There must be more than two rooms in a house to accommodate five people. The majority of people in Israel live in studio apartments. Sales of LEDs have increased as a result of the growth in household sizes.

In the Middle East and Africa, 2.33 million automobiles were produced in total in 2022, and 2.45 million were anticipated to be produced in 2023. Although it is still in its early stages, the electric vehicle (EV) market across the Middle East and African countries is already showing hopeful signs of growth. As local governments become more aware of the need to reduce their carbon footprint, they are passing legislation to promote the use of EVs. The United Arab Emirates, Saudi Arabia, Bahrain, and Oman, for instance, have announced their net-zero targets. Several countries in the region are also offering tax incentives and subsidies to promote the purchase of electric vehicles. Due to the enormous potential that EVs present in this region, it is projected that demand for LED lighting will rise.

## Middle East and Africa Outdoor LED Lighting Industry Overview

The Middle East and Africa Outdoor LED Lighting Market is fragmented, with the top five companies occupying 21.10%. The major players in this market are Al Nasser Group, EGLO Leuchten GmbH, LEDVANCE GmbH (MLS Co Ltd), OPPLE Lighting Co., Ltd and Signify Holding (Philips) (sorted alphabetically).

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