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Chip-on-Board LED Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Chip-on-Board LED Market Summary

Introduction and Market Overview

Chip-on-Board (COB) LEDs, offering high brightness and efficiency, are used in lighting, automotive, and display applications. With global LED lighting demand growing 7% in 2023, COB LEDs are valued for energy efficiency. The rise of smart lighting and automotive innovations drives market expansion. The global COB LED market is estimated at USD 600-900 million in 2025, with a CAGR of 6%-10% through 2030, fueled by energy-saving trends and technological advancements.

Regional Market Trends

North America: The U.S. and Canada lead with demand for smart lighting and automotive COB LEDs.

Europe: Germany and UK focus on energy-efficient and high-performance LEDs.

Asia Pacific: China, Japan, and South Korea see growth in lighting and backlight applications.

Rest of the World: Brazil and India expand with rising urbanization and lighting needs.

Application Analysis

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Illumination: Expected growth of 6%-10%, driven by residential and commercial lighting. Trends focus on smart systems.

Automotive: Projected growth of 7%-11%, valued for headlights and interiors. Trends emphasize durability.

Backlight: Anticipated growth of 5%-9%, used in displays. Trends highlight high-resolution screens.

Others: Growth of 4%-8%, including medical lighting, with a focus on niche applications.

Type Analysis

COB LED Modules: Expected growth of 6%-9%, preferred for general lighting. Trends focus on modularity.

COB LED Arrays: Projected growth of 7%-11%, valued for high-power applications. Trends emphasize efficiency.

COB LED Components: Anticipated growth of 5%-8%, used in custom solutions. Trends highlight miniaturization.

Key Market Players

Bridgelux: Markets COB LEDs for general lighting.

WOLFSPEED, EPISTAR Corporation, Lextar Electronics Corporation, Lumileds Holding, EVERLIGHT ELECTRONICS, Savant Systems, NICHIA CORPORATION, ams-OSRAM, Signify Holding, SAMSUNG, Seoul Semiconductor: Focus on high-efficiency and durable COB LED solutions.

Porter’s Five Forces Analysis

Threat of New Entrants: Moderate, due to manufacturing expertise and capital barriers.

Threat of Substitutes: High, with traditional LEDs and OLEDs as alternatives.

Bargaining Power of Buyers: High, due to multiple suppliers and price sensitivity.

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Bargaining Power of Suppliers: Moderate, due to limited high-quality chip sources.

Competitive Rivalry: High, driven by innovation in efficiency and brightness.

Market Opportunities and Challenges

Opportunities:

Leveraging 7% LED lighting market growth for COB LEDs.

Targeting smart lighting and automotive applications.

Innovating with high-efficiency and miniaturized COB LEDs.

Expanding into emerging markets like India and Brazil.

Challenges:

Competing with OLED and traditional LED technologies.

High costs of developing high-performance COB LEDs.

Addressing heat dissipation concerns in COB designs.

Navigating energy efficiency regulations.

Managing supply chain disruptions for LED chips.

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