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Lighting Fixtures

US Industry Study with Forecasts for **2012 & 2017**

Study #2326 | March 2008 | \$4600 | 375 pages



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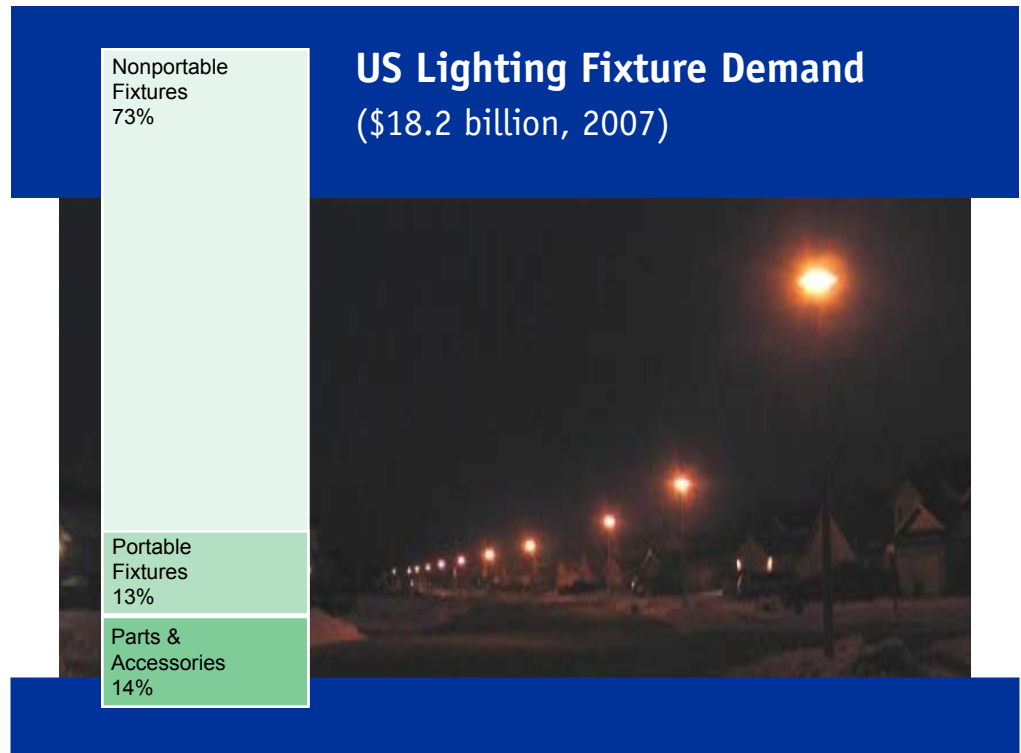
Demand will increase fastest for advanced products such as high intensity discharge (HID) fixtures and light emitting diodes (LEDs), which are typically more energy efficient.

US demand to rise 3.5% annually through 2012

Demand for lighting fixtures in the US is forecast to grow 3.5 percent per annum through 2012 to \$21.6 billion. Growth in inflation-adjusted terms (2.7 percent per year) represents an improvement relative to the 2002-2007 period. A stronger outlook for construction markets will drive gains, especially the increased construction of housing and transportation infrastructure. Demand from the manufacturing market will also improve, as domestic production of motor vehicles rebounds. Across all markets, demand will increase fastest for advanced products such as high intensity discharge (HID) fixtures and light emitting diodes (LEDs), which are typically more energy efficient than traditional incandescent lighting systems.

Nonbuilding construction to lead market gains

The nonbuilding construction market is projected to be the fastest growing market through 2012, with annual growth approaching six percent. This improvement is the consequence of a more favorable outlook for the construction of highways and streets, which generates demand for roadway and other outdoor lighting fixtures. As a result of the strength of this market, outdoor lighting fixtures will be among the fastest growing product types through 2012.



Lighting fixture demand for both residential and nonresidential buildings is forecast to accelerate marginally through 2012. Nonresidential building demand will be supported by an increase in building construction. Residential lighting fixture demand had benefited from strong new housing construction after 2001. But housing demand peaked late in 2005, and housing completions dropped sharply in 2007 amid problems in mortgage markets, reducing demand for residential lighting fixtures. As construction of new housing units recovers through 2012, real demand for lighting fixtures will return to strong growth, offsetting a deceleration in unit price increases.

Vehicular market to show renewed growth

OEM demand in the vehicular market is projected to return to strong growth through 2012. Driving this trend is the production of domestic motor vehicles, which is projected to once again experience growth after declining in the years leading up to 2007. As a whole, the vehicular lighting fixture market is projected to increase over three percent per annum to \$3.8 billion in 2012. This market will also benefit from the more widespread use of technologically advanced lighting fixtures, including "smart" headlamps and those that use HID and LED light sources.

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Sample Text, Table & Chart

MARKETS

Market Characteristics: Other nonresidential buildings recreational buildings (e.g., theaters, casinos and sports facilities), institutional government buildings, bus and airport terminals, and other buildings not elsewhere discussed. In real terms, construction in these buildings declined over the past decade, with the greatest decline accruing between 2002 and 2007. This eroded demand for lighting fixtures in these buildings, and offset the gains posted in improvement and repair applications.

Many buildings in this market have outdoor lighting systems and thus use floodlights, large area, building-mounted and site lighting fixtures. Specialty outdoor fixtures such as spotlights and underwater lighting fixtures are also common. The wide range of buildings included in this market have widely varying lighting requirements, resulting in significant variations in the types of fixtures used. For example, sporting arenas almost exclusively use metal halide and other HID lighting systems that furnish very bright light, while transportation facilities such as airports generally use fluorescent fixtures. Additionally, fixtures used in such niche markets as casinos, theaters and entertainment studios include many specialized or custom-designed products.

Demand by Application: New construction accounts for the majority of lighting fixture demand in the other nonresidential building construction market, accounting for 70 percent of the total in 2007. Demand in this application is expected to grow at a rate of 1.5 percent per annum through 2012 to \$1.5 billion. This growth will be driven by the increased construction of transit projects. Outpacing new lighting fixture demand, repair and replacement applications will grow 2.5 percent per annum through 2012. This pace does, however, represent a significant improvement over the 2002 to 2007 period.

SAMPLE TEXT

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TABLE V-6

NORTHEAST LIGHTING FIXTURE DEMAND BY SUBREGION & MARKET (million dollars)

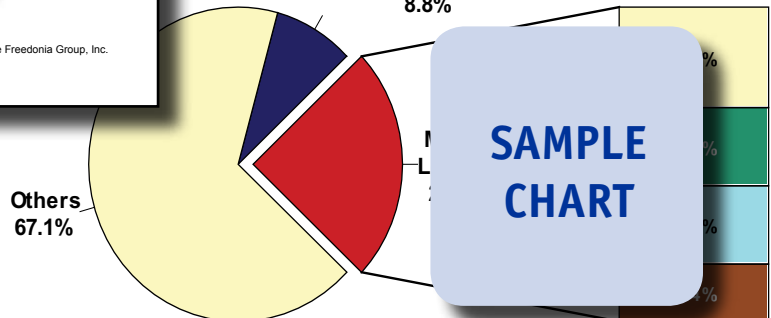
Item	1997	2002	2007	2012	2017
Northeast GDP (bil \$)	15	15	15	15	15
\$ fixtures/000\$ GDP	2	2	2	2	2
Northeast Lighting Fixture Demand	0	0	0	0	0
By Subregion:					
New England	0	0	0	0	0
Middle Atlantic	0	0	0	0	0
By Market:					
Construction	0	0	0	0	0
Manufactured Goods	0	0	0	0	0
% Northeast Lighting Fixture Demand	15	15	15	15	15

SAMPLE TABLE

CHART VI-1

LIGHTING FIXTURE MARKET SHARE, 2007 (\$18.2 billion)

Second Tier Leaders 8.8%



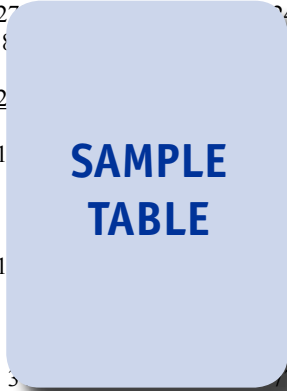
SAMPLE CHART

*Acquired by Royal Philips Electronics in January 2008.

Sample Profile, Table & Forecast

TABLE III-11
MOTOR VEHICLE LIGHTING FIXTURE DEMAND
BY TYPE & LAMP TECHNOLOGY
(million dollars)

Item	1997	2002	2007	2012	2017
Vehicular-Type Light Fixture Demand	27	30	32	34	36
% motor vehicle	8	8	8	8	8
Motor Vehicle Lighting Fixt Demand	2	2	2	2	2
By Type:					
Parking, Tail & Interior	1	1	1	1	1
Composite Headlamp					
Spot, Fog & Auxiliary					
By Lamp Technology:					
Incandescent	1	1	1	1	1
Halogen					
LED, HID & Other					
LED					
HID & Other	5	5	5	5	5



COMPANY PROFILES

Brinkmann Corporation
 4215 McEwen Road
 Dallas, TX 75244
 972-716-4262
 http://www.bri

SAMPLE PROFILE

Annual Sales: \$
 Employment:

Key Products: lanterns, fish-
 ing lights and c

Brinkmann Corporation is a privately held manufacturer of handheld lighting products such as spotlights, flashlights and lanterns. Other lighting products include outdoor lighting fixtures, such as general-purpose outdoor lighting fixtures, motion detectors and solar-powered lights. The Company also manufactures outdoor cooking products, boat and personal watercraft covers, lawn and garden products, personal alarms, and ground fault circuit interrupters.

The Company participates in the US lighting fixture industry through the production of landscape lighting, flashlights and spotlights. Landscape lighting from Brinkmann encompasses solar, low-voltage and home security lighting, as well as related accessories. Solar lighting fixtures include garden accent luminaires in ground stake, hanging and post-top styles. These fixtures are marketed under such brand names as MIRAGE, MISSION, SIERRA, SOLAR MAX, HAMPTON and EMPEROR. The Company sells low-voltage landscape lights individually or in combination sets of four or ten. Among these products are YARD LITES low-voltage single tier-style luminaires that use 4-watt bulbs. Home security lighting products from Brinkmann include

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“Demand for other vehicular-type lighting fixtures is forecast to grow 2.2 percent per annum through 2012 to \$440 million. This is an improvement relative to the pace experienced between 2002 and 2007, as demand benefits from the improved outlook for the aerospace market through 2012. Additionally, gains will benefit from ...”

--Section III, pg. 105

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OTHER STUDIES

World Major Household Appliances

Global white goods demand will grow 3.1% yearly through 2011. India will lead gains based on low penetration rates and rising living standards. Replacement demand will spur growth in developed areas as users replace broken appliances and trade up for newer models like more efficient "green" types. This study analyzes the 413 million unit world white goods industry, with forecasts for 2011 and 2016 by product, world region and for 25 countries. It also evaluates market share and profiles major players.

#2279 01/2008..... \$5800

Lamps

US demand for lamps will grow 5% annually through 2011. Growth will be driven in part by a shift toward more expensive, energy-efficient lamps such as compact fluorescents (CFLs). Fluorescent lamps will enjoy the largest gains while incandescents will remain a key component of lamp demand going forward. This study analyzes the \$5.4 billion US lamps industry, with forecasts for 2011 and 2016 by product and market. It also considers market environment factors, details market share and profiles major players.

#2265 11/2007..... \$4500

Outdoor Furniture & Grills

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as "cocooning" and "outdoor rooms." Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the \$6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2221 09/2007..... \$4400

Advanced Lighting

US demand for advanced lighting will grow nearly 14% annually through 2011. Gains will be driven by energy efficient compact fluorescent lamps (CFLs), improved light emitting diode (LED) technology, and popular high intensity discharge headlamps for motor vehicles. Building applications will be the fastest growing market. This study analyzes the \$2.3 billion US advanced lighting industry, with forecasts for 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

#2197 06/2007..... \$4400

Industrial Crystals

US industrial crystal demand will grow 5.8% yearly through 2011, led by uses in nonlinear optical materials and compound semiconductor substrates. Communications and security/defense will see the largest market gains. Transition metal-based crystals and semiconducting types will be the fastest growing materials. This study analyzes the \$845 million US industrial crystal industry, with forecasts for 2011 and 2016 by material, application and market. It also evaluates market share and profiles leading players.

#2166 05/2007..... \$4500

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