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World Lighting Fixtures

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

Study #2391 | August 2008 | \$5700 | 359 pages



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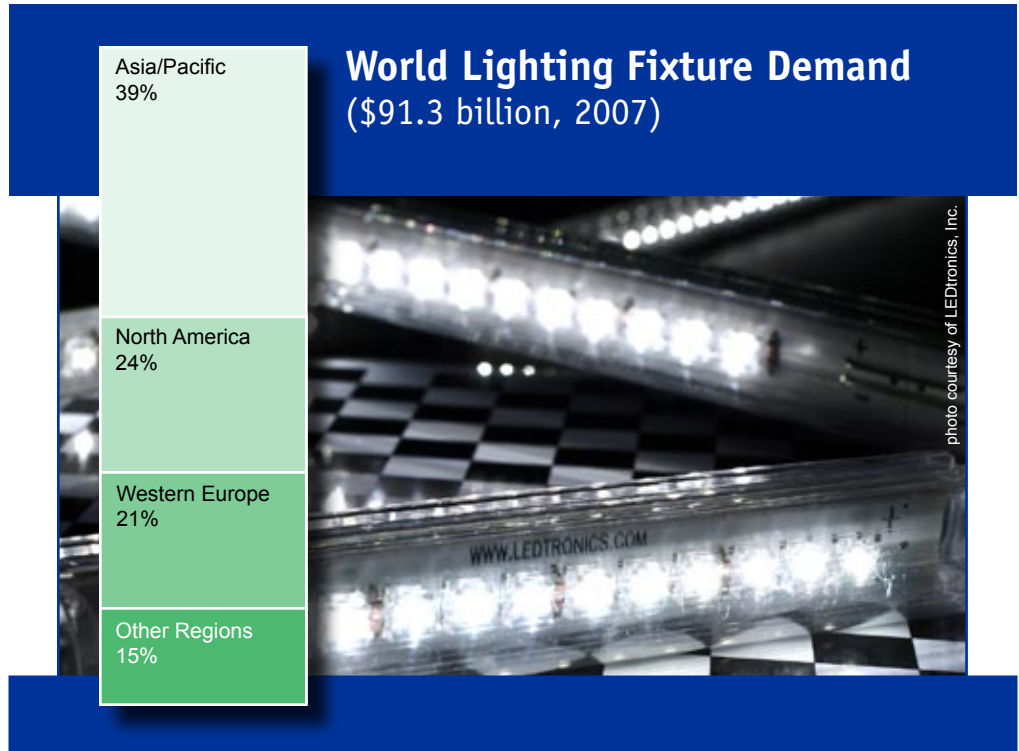
Advanced, energy-efficient products such as electronic ballasts and LED and CFL fixtures are expected to benefit from elevated energy costs and growing environmental concerns.

Global demand to rise 5.2% yearly through 2012

Worldwide demand for lighting fixtures is forecast to rise 5.2 percent per annum through 2012 to nearly \$118 billion. Growth will slow relative to the pace of the 1997-2007 period, in large part due to more modest price increases. While demand for lighting fixtures in the large markets of Japan and the United States will improve from their sluggish gains over the past decade, the developing economies of Asia and Eastern Europe are projected to post the fastest growth. Technologically advanced products that offer increased energy efficiency are expected to perform favorably over the forecast period, spurred by elevated energy costs and growing environmental concerns. Among such products are electronic ballasts and fixtures designed for use with energy-efficient light sources (e.g., LEDs and CFLs).

China to be largest market, India fastest growing

China is forecast to become the largest national lighting fixture market in 2012, surpassing the US and accounting for 20 percent of the global market. India will post the fastest growth of any major national market, as demand is expected to grow more than ten percent per annum through 2012. The smaller market in Russia is also expected to post strong gains, leading growth in Eastern Europe. Lighting fixture demand in the advanced economies of Western Europe, the US and Japan is projected to



lag the global average through 2012. Of these markets, the US is expected to achieve the fastest gains, as construction markets recover from the downturn that began in 2006 and motor vehicle production increases. Demand in Japan and Western Europe will be restrained by weak construction markets and poor prospects for motor vehicle production.

Construction market to offer best opportunities

The construction market will remain the faster growing source of lighting fixture demand, despite a moderation in construction activity worldwide. The greatest gains will come from the developing nations of Asia (particularly

China) where construction activity is growing fastest. Nonbuilding (e.g., streets and highways) construction activity will remain relatively robust while nonresidential and residential building construction experience more pronounced decelerations. Consequently, outdoor lighting fixtures (e.g., roadway lighting) are projected to be the fastest growing fixture type through 2012. Demand in the manufactured goods market will see robust growth in Eastern Europe, which is expected to be the fastest growing region in terms of lighting fixture demand. Motor vehicle lighting fixture demand will be particularly strong, as motor vehicle production in the region will outperform all other regions.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

Taiwan: Demand by Type & Market

The market for lighting fixtures in Taiwan is expected to grow at an annual rate of 5.5 percent per annum through 2012 to US\$1.082 billion, faster than the forecast pace of 5.0 percent for most other Asia/Pacific countries and 2007, as the fixture market is expected to be markedly through

Demand for lighting fixtures in Taiwan is expected to increase through 2012 to US\$1.082 billion. This pace is faster than the 2002-2007 period, which was recovering from a rebound in production decline. Taiwan's manufacturing production is expected to show strong growth through 2012, which is projected to rise 1.5 percent through 2012 to US\$1.082 billion, significantly faster than the rate forecast for any other fixture type.

It should be noted that the production of manufactured goods in Taiwan's export-oriented economy is impacted by trends in foreign trade to a larger extent than in most other countries of the world. In addition, Taiwan's exports are increasingly tied to the requirements of the vast and booming neighboring Chinese market. Consequently, any economic slowdown in China, increased competition from other regionally based exporting nations, or deterioration in relations with China will negatively impact production of manufactured goods and demand for lighting fixtures in Taiwan.

While demand for lighting fixtures in construction is expected to increase 5.5 percent per year, outlooks vary within the construction market. Building construction activity in Taiwan is expected to moderate from the 2002-2007 period, during which building construction rebounded from its poor performance over the 1997-2002 period. In contrast, non-building construction activity is expected to be strong through 2012,

TABLE VI-16

**TAIWAN - LIGHTING FIXTURE DEMAND
 BY TYPE & MARKET
 (million US dollars)**

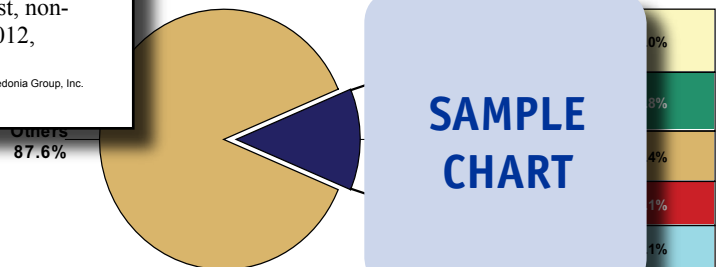
Item	1997	2002	2007	2012	2017
Lighting Fixture Demand	500	460	600	820	1080
By Type:					
Nonportable					720
Indoor					505
Outdoor					215
Vehicular					0
Portable					5
Parts & Accessories					5
By Market:					
Construction					0
Manufactured Goods					0
% Taiwan					6
Asia/Pacific Fixture Demand	10				0

**SAMPLE
 TEXT**

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD LIGHTING FIXTURE
 MARKET SHARE BY COMPANY, 2007
 (\$91.3 billion)**

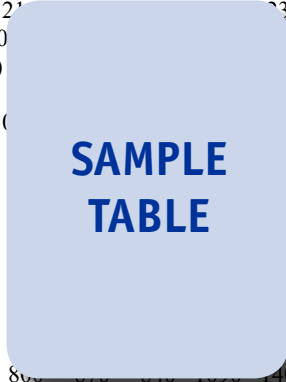


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VI-15
TAIWAN - LIGHTING FIXTURE SUPPLY & DEMAND

Item	1997	2002	2007	2012	2017
Population (millions)	21	22	23	23.3	23.3
GDP/capita	20	20	20	25	25
Gross Domestic Product (bil 2006 US\$)	420	440	460	580	580
Gross Fixed Invest (bil 2006 US\$)	10	10	10	15	15
\$ lighting/capita				46	46
\$ lighting/000\$ GDP				1.1	1.1
\$ lighting/000\$ GFI				4	4
Lighting Fixture Demand (mil US\$)				80	80
+net exports				20	20
Lighting Fixture Shipments (mil US\$)	80	80	80	100	140



COMPANY PROFILES

Bajaj Electricals Limited
 45-47 Veer Nariman Road
 Mumbai 400023
 India
 91-22-22-22-22
 http://www.bajajelectricals.com

Sales: \$ (08)
 Employed: (08)

Key Products: landscape, area, retail, luminaires

SAMPLE PROFILE

Bajaj Electricals, a subsidiary of Bajaj Group (India), manufactures and markets consumer household and industrial products. The Company operates through four segments: Lighting, Consumer Durables, Engineering and Projects, and Others.

The Company participates in the world lighting fixtures industry through the Lighting segment, which had FY 2008 sales of \$98 million, including intersegment sales. The segment produces luminaires and lamps for indoor and outdoor applications. In FY 2008, luminaires accounted for sales of \$56 million. Bajaj Electricals' luminaires include residential, commercial decorative, landscape, area, retail, roadway, industrial and hazardous area types. For example, the Company's residential luminaires encompass wall- and ceiling-mounted fluorescent and compact fluorescent models available under the ELEGANT, NU-LITE, QUICKLITE, ULTIMA and GRACE brand names. Commercial decorative luminaires include recessed, pendant, KORNERA corner-mounted and ACCURA surface-mounted varieties.

Among the Company's landscape luminaires are LE MAGIGUE models, which feature polycarbonate diffusers and a modular design;

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“Lighting fixture demand in Taiwan totaled US\$600 million in 2007, or US\$26 per capita. While Taiwan is a relatively small market for lighting fixtures, its per capita demand is well above the regional average, and Taiwan is an important supplier of lighting fixtures to the world market. In 2007, Taiwan produced US\$840 million of lighting fixtures, exporting a significant portion throughout the Asia/Pacific region.”

--Section VI, pg. 154

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OTHER STUDIES

Sensors

US sensor demand will grow 4.3% annually through 2012, supported by increasing output of major sensor-containing products such as motor vehicles. Sensors based on new technologies (e.g., MEMS-based, imaging) will see the fastest gains. The automotive industry will remain the biggest market while growth in military and aerospace uses will also be strong. This study analyzes the \$10.3 billion US sensor industry, with forecasts for 2012 and 2017 by product and market. It also evaluates market share and profiles major players.

#2377 07/2008..... \$4600

Advanced Flat Glass

Demand for advanced flat glass in the US will grow 5% annually through 2012. Ongoing rapid growth in a variety of emerging technologies (e.g., smart glass, self-cleaning glass) and strong gains in laminated glass used as hurricane glass, ballistic glass and burglary resistant glass will help drive gains. This study analyzes the \$5.6 billion US advanced flat glass industry, with forecasts for 2012 and 2017 by product and market. It also considers market environment factors, profiles industry competitors and evaluates their market share.

#2342 06/2008..... \$4500

World Security Equipment

Global demand for security equipment will climb 7.8% annually through 2012. Strongest gains will occur in the underdeveloped markets of Asia, Eastern Europe, Africa/Middle East and Latin America. Electronic security products will post stronger sales advances than mechanical security equipment. This study analyzes the \$62.1 billion world security equipment industry, with forecasts for 2012 and 2017 by product, market, world region and for 28 countries. It also evaluates market share and profiles industry players.

#2343 05/2008..... \$5900

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

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

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