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World Electric Lighting

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

Study #2442 | December 2008 | \$5600 | 294 pages

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Although demand in advanced economies will generally lag the global average, several markets will post respectable gains, including the Netherlands, South Korea, Taiwan and the US.

World demand to increase 7.4% yearly through 2012

Global demand for electric lighting is forecast to exceed \$40 billion in 2012 on annual gains of more than seven percent. The BRIC economies -- Brazil, Russia, India and China -- are projected to be the fastest growing markets for electric lighting products through 2012. Driven by rising incomes and rapidly growing nonresidential construction, these four nations will account for about 40 percent of the additional demand generated between 2007 and 2012. The greatest gains will come from China, which is expected to be the world's fastest growing market and largest producer of electric lighting.

Although demand for electric lighting in the advanced economies is expected to lag the global average, several national markets are expected to post respectable gains, among them the Netherlands, South Korea, Taiwan and the US. Demand in these nations will benefit from an improved outlook for construction activity over the forecast period. However, for most other advanced economies, growth of the construction market is projected to decelerate.

Production of electric lighting is expected to continue to shift to the Asia/Pacific region, largely driven by Chinese manufacturing. China is projected to account for one-quarter of global shipments in 2012, with a significant share exported to the US. Eastern Europe is also forecast to account for an increas-



ing share of global production, owing to increased trade with Western Europe.

LEDs, fluorescent lamps to grow at healthy pace

LED lighting devices are forecast to grow at an above average pace in every regional market, as these products continue to penetrate both the construction and manufactured goods markets. Gains will be particularly fast in the Asia/Pacific region, where demand for LED lighting is expected to double between 2007 and 2012.

Fluorescent lamps are expected to benefit from advances in nonresidential construction, as well as increased

penetration of compact fluorescent lamps (CFLs) in residential markets. This penetration will result in above average growth, as CFLs are substantially more expensive than the incandescent lamps they replace.

The incandescent lamp segment is expected to be the slowest growing, restrained by slowing motor vehicle production and weaker residential construction (the segment's principal markets) as well as greater competition from fluorescent lamps spurred by energy-efficiency concerns. Additionally, demand for incandescent lamps will be encumbered by government regulations intended to reduce the use of general service incandescent lamps.

**Sample Text,
 Table & Chart**

MARKETS

China: Supply & Demand

Demand for electric lighting in China is accounting for over 35 percent of the world's second largest national market (the United States), owing to its rapid growth of China's demand for electric lighting market, which was the world's largest capita electric lighting demand in the past few years. China's demand for electric lighting is growing economies of Brazil, South Africa and Turkey, and in line with the regional average.

**SAMPLE
 TEXT**

China is the world's leading exporter of electric lighting, exporting \$3.9 billion in 2007. Although the largest share of China's exports remain within the Asia/Pacific region (especially India, Indonesia, Japan, South Korea and Taiwan), the United States is China's largest national market. The vast majority of China's imports come from within the Asia/Pacific region, chiefly Japan and South Korea. Outside of the region, China's major source of imports is Western Europe, with North America and Eastern Europe playing minor roles.

As the world's largest producer of electric lighting, China is home to many manufacturers, including Foshan Electrical and Lighting, Jingwei Lighting, Nanjing Sanle Group, Shanghai Guangheng Lighting and Zhejiang Yankon Group. The world's three largest electric lighting firms -- GE Lighting (USA), Osram (Germany) and Philips Lighting (Netherlands) -- each maintain manufacturing operations in China. Many foreign-based firms maintain manufacturing operations in China, especially firms based in the Asia/Pacific region. Such firms include Hong Kong-based Super Trend Lighting, Taiwan's China Electric Manufacturing, US-based Cree (via COTCO Luminant Device) and Japan's Toshiba (via Harison Toshiba Lighting).

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TABLE VI-3

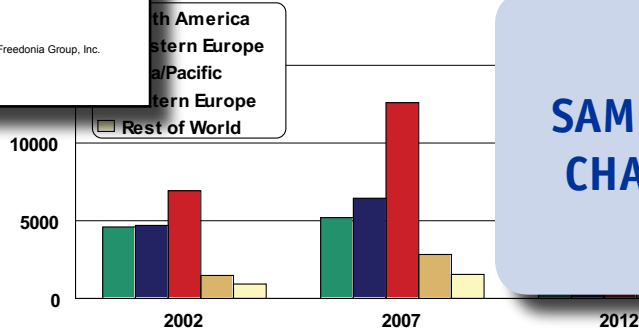
**CHINA -- ELECTRIC LIGHTING SUPPLY & DEMAND
 (million dollars)**

| Item | 1997 | 2002 | 2007 | 2012 | 2017 |
|-------------------------------------|------|------|------|------|------|
| Population (millions) | 12 | 13 | 14 | 15 | 16 |
| GDP/capita | 2 | 3 | 4 | 5 | 6 |
| Gross Domestic Product (bil 2006\$) | 2 | 3 | 4 | 5 | 6 |
| \$ electric lighting/capita | | | | | 9.2 |
| \$ electric lighting/000\$ GDP | | | | | 87 |
| Electric Lighting Demand | | | | | 40 |
| - imports | | | | | 00 |
| + exports | | | | | 80 |
| Electric Lighting Shipments | 10 | 15 | 20 | 25 | 3620 |

**SAMPLE
 TABLE**

CHART III-3

**ELECTRIC LIGHTING SHIPMENTS BY REGION, 2002-2012
 (million dollars)**

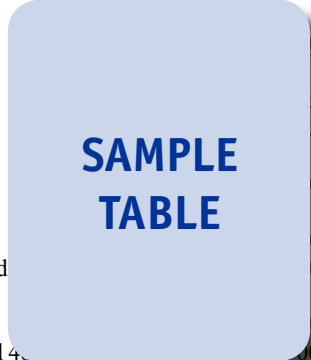


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VI-4
CHINA -- ELECTRIC LIGHTING DEMAND BY TYPE & MARKET
 (million dollars)

| Item | 1997 | 2002 | 2007 | 2012 | 2017 |
|---|------|------|------|------|------|
| Electric Lighting Demand | | | | | |
| By Type: | | | | | |
| Fluorescent | | | | | |
| Incandescent | | | | | |
| LED5 | | | | | |
| HID & Other | | | | | |
| By Market: | | | | | |
| Construction | | | | | |
| Motor Vehicle & Other Mfd Good | | | | | |
| % China | | | | | |
| Asia/Pacific Electric Lighting Demand 4 | | | | | |



COMPANY PROFILES

Zumtobel AG
 Hoechster Strasse Eight
 6850 Dornbirn
 Austria
 43-5572-509-0
 http://www.zu

Revenues: \$
 Geographic F
 and Switzerla
 Europe 5%; N
 Australia and
 Other Areas I
 Employment.

Germany, Austria
 es 33%; Eastern
 %; Asia 7%;
 ca 3%; and

SAMPLE PROFILE

Key Products: high-efficiency digital light sources

Zumtobel is a leading manufacturer in the international lighting industry, producing luminaires and lighting solutions, lighting components and connection technology; and luminaire components and lighting management systems. The Company operated in two divisions in FY 2008: Zumtobel Lighting and TridonicAtco. Beginning in May 2008, Zumtobel reorganized into four divisions: Zumtobel Lighting, Zumtobel Components, Zumtobel LED and Zumtobel Residential.

The Company participates in the world electric lighting industry through the Zumtobel LED division. In FY 2007, this division operated as a part of the former Zumtobel Lighting division, which generated sales of \$1.3 billion and employed 5,670. The division's operations include LEXEDIS Lighting GmbH (Austria), a 50/50 joint venture between the Company's TridonicAtco GmbH & Company KG subsidiary (Austria) and Toyoda Gosei Company Limited (Japan).

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"The market for electric lighting in China is forecast to grow 14 percent per year to \$7.3 billion in 2012, and the country will remain the largest national market for electric lighting. Although this represents a slower rate of growth than that achieved between 2002 and 2007, the magnitude of the gains will be greater. The majority of growth will be concentrated in the construction market, particularly in nonresidential applications."

--Section VI, pg. 127

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OTHER STUDIES

World Lighting Fixtures

Global demand for lighting fixtures will rise 5.2% annually through 2012. While demand in the large markets of Japan and the US will improve, the developing economies of Asia and Eastern Europe will grow the fastest. China is forecast to become the largest national lighting fixture market in 2012, surpassing the US. This study analyzes the world lighting fixture industry, with forecasts for 2012 and 2017 by product, market, world region and for 23 countries. It also evaluates market share and profiles industry players.
 #2391 08/2008..... \$5700

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

Insulated Wire & Cable in China

Demand for insulated wire and cable in China will grow 13% annually through 2011. Gains will be fueled by strong investment in the power grid, telecommunication and building construction sectors, as well as by further increases in the manufacture of products that use insulated wire and cable. This study analyzes the ¥181 billion insulated wire and cable industry in China, with forecasts for 2011 and 2016 by material, product, market and region. It also evaluates company market share and profiles industry participants.
 #2338 05/2008..... \$5100

Lighting Fixtures

US lighting fixture demand will reach \$21.6 billion by 2012. Advanced and more energy efficient products (e.g., HID fixtures, LEDs) will grow the fastest. Nonbuilding construction will lead market gains based on a better outlook for new highway and street construction. Outdoor lighting will be among the fastest growing products. This study analyzes the US lighting fixture industry, with forecasts for 2012 and 2017 by product, market and region. It also evaluates market share and profiles major lighting producers.
 #2326 03/2008..... \$4600

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

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