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Advanced Lighting

US Industry Study with Forecasts for **2013 & 2018**

Study #2486 | April 2009 | \$4700 | 240 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Gains will be spurred by legislation banning the sale of general service incandescent lamps starting in 2012, and CFLs are expected to replace most of these lamps as they burn out.

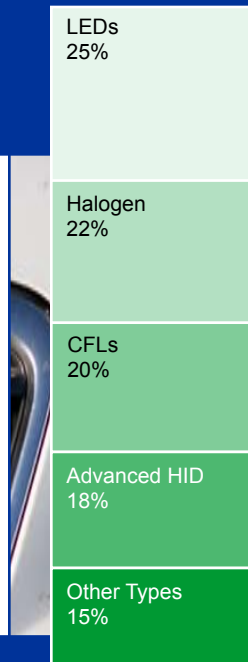
US demand to grow 10.9% annually through 2013

US demand for advanced lighting products is forecast to grow nearly eleven percent per annum to \$6.8 billion in 2013. Gains will be spurred by legislation aimed at reducing the energy consumed by lighting. Domestic shipments of advanced lighting products will proceed at a slower pace, as products with rapidly growing demand, such as compact fluorescent lamps (CFLs) and light emitting diodes (LEDs), are largely produced overseas. Imports are a significant source of advanced lighting products, and will account for almost 70 percent of demand in 2013. However, the US is a leading exporter of advanced lighting products, and domestic producers will continue to benefit from growing demand in emerging markets.

CFLs to be fastest growing type through 2013

CFLs are expected to enjoy the fastest demand growth through 2013. The Energy Independence and Security Act of 2007 will ban the sale of general service incandescent lamps starting in 2012, and CFLs are expected to replace most of these lamps as they burn out. Demand for CFLs will surge more than 20 percent annually through 2013 as consumers transition to the new technology. Long-term demand will ultimately proceed at a slower pace, however, due to lower replacement rates, as CFLs last much longer than incandescent lamps. Nearly one-half of additional advanced

US Advanced Lighting Demand (\$4 billion, 2008)



lighting demand generated between 2008 and 2013 will be claimed by CFLs.

LEDs to be fastest growing type through 2018

LEDs are also forecast to experience robust growth through 2013, benefiting from greater demand in consumer electronics, motor vehicles and nonresidential buildings. Falling prices, increases in light output and improvements in energy efficiency will make LEDs more competitive with conventional lighting products over the forecast period. LEDs will be the fastest growing advanced lighting product through 2018, when demand is expected to approach \$3 billion. Demand for advanced high-intensity discharge (HID) lamps is

forecast to exceed \$1 billion in 2013, driven by growth in motor vehicle and streetlight applications. Metal halide HID lamps are increasingly finding use as motor vehicle headlamps, and demand will grow as motor vehicle production recovers from its low 2008 level. Sodium vapor HID lamps are widely used to illuminate streets and highways, and will benefit from increased spending on transportation infrastructure over the forecast period. Furthermore, the Energy Policy Act of 2005 banned the sale of mercury vapor lamp ballasts, effectively phasing out the use of mercury vapor lamps starting in 2008. Advanced HID products, the closest substitute, will be used to replace most mercury vapor lamps when their ballasts fail.

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Sample Text, Table & Chart

REGIONS

East North Central -- The East North Central subregion comprises the states of Illinois, Indiana, Michigan, Ohio and Wisconsin. This area, which includes a majority of the so-called "Rust Belt," faced a significant restructuring in the 1980s as the heavy manufacturing industries downsized. This restructuring, however, diversified the economic base better positioned to be equipped for the future. However, traditional manufacturing industries still play a major role in the economic well-being of the subregion. Thus, this area was hit hard by the 2001 recession as tens of thousands of industrial jobs were lost. Although small pockets of economic health do exist within the subregion's metropolitan areas, other parts are languishing. Economic growth in the East North Central is forecast to increase slowly through 2013, the only subregion expected to see an improvement in economic growth. Advances in the subregion's population will remain below the national average.

Demand for advanced lighting in the East North Central subregion is forecast to rise to \$4 billion, the slowest of any subregion. This reflects the importance of the market to advanced lighting, which is one-half of domestic motor vehicle production, primarily in Michigan and Ohio.

West North Central -- The West North Central subregion comprises Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota. Traditionally dependent on the agricultural sector and downstream industrial activities such as food processing, the subregion also boasts relatively developed light manufacturing, trade and service sectors. During the 1990s, the area even established a formidable high technology base, concentrated in Minnesota. However, agriculture remains an important part of the economy in many parts of the subregion.

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TABLE IV-8

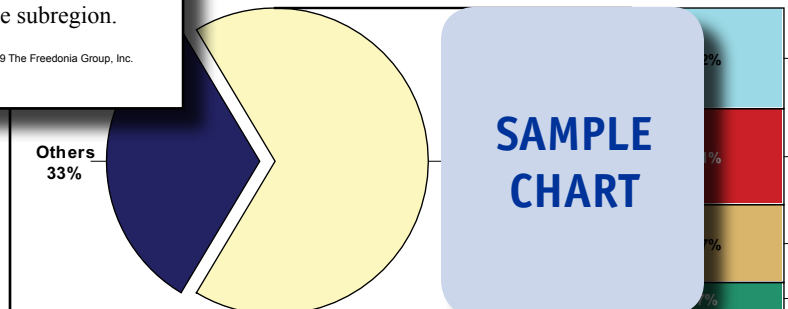
**ADVANCED HIGH INTENSITY DISCHARGE LAMP DEMAND
BY TYPE & MARKET
(million dollars)**

Item	1998	2003	2008	2013	2018
Highway Noncapital Spending (bil \$)	5.5	5.5	5.5	5.5	5.5
\$ HID/000\$ hwy spending					
Advanced HID Lamp Demand					
By Type:					
Metal Halide					
Sodium Vapor					
By Market:					
Outdoor					
Nonresidential					
Motor Vehicle					
Other					

**SAMPLE
TABLE**

**SAMPLE
TEXT**

CHART VII-1
**ADVANCED LIGHTING MARKET SHARE BY COMPANY, 2008
(\$4.0 billion)**



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE V-4
NONRESIDENTIAL BUILDINGS MARKET
FOR ADVANCED LIGHTING
(million dollars)

Item	1998	2003	2008	2013	2018
Nonresidential Bldg Stock (bil 2000\$)	620	620	620	630	630
\$ lighting/mil \$ bldg stock					22
Advanced Lighting Demand					70
By Sector:					
Office & Commercial					30
Institutional					70
Industrial					30
Other					90
By Type:					
Fluorescents					10
LEDs					50
Halogens					00
Other					00
% nonresidential					3
Total Advanced Lighting Demand	15				00



COMPANY PROFILES

Light Sources Incorporated
 37 Robinson Boulevard
 Orange, CT 06477
 203-799-7877
<http://www.light-sources.com>

Annual Sales:
 Employment:
 Key Products:

SAMPLE PROFILE

Light Sources Incorporated is a designer of germicidal and ozone ultraviolet (UV) lamps for original equipment manufacturer applications. The Company's T-14 FATLAMP and SOLGLASS products. The Company's T-14 FATLAMP bulbs provide up to 300 watts (W) of power, and are designed to allow tanning bed manufacturers to develop high-power, next-generation products. SOLGLASS technology combines a glass tube and a proprietary phosphor blend. These lamps provide narrow-band UV rays for immediate coloring and short-wavelength UV rays for persistent pigmentation. Furthermore, Light Sources utilizes several technologies to enhance its tanning lamps, including CCT cup cathode technology, which is intended to prevent the lamp ends from blackening; MULTITONE lamp coating, a process that is used to create two tanning zones in a single lamp; and A-POWER technology that blends UV-A rays for high-powered lamps.

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“Demand for advanced lighting in the nonresidential buildings market is forecast to rise 4.5 percent per year to \$1.5 billion in 2013. The pace represents a deceleration from the 2003-2008 period, as a projected decline in nonresidential construction activity over the forecast period slows the expansion of the nonresidential building stock. Furthermore, gains will be constrained by ...”

--Section V, pg. 112-3

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OTHER STUDIES

World Electric Lighting

Global electric lighting demand will grow 7.4% annually through 2012. The BRIC economies will be the fastest growing markets, driven by rising incomes and rapidly growing nonresidential construction. LED lighting devices and fluorescent lamps will outpace incandescent lamps. This study analyzes the \$28 billion world electric lighting 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.

#2442 12/2008..... \$5600

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

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

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

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