Lamps

US Industry Study with Forecasts for 2013 & 2018

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Federal regulations intended to reduce the energy consumed by lighting will spur demand for compact fluorescent lamps at the expense of conventional incandescent lamps through 2013.

US demand to rise 3.8% annually through 2013

US demand for lamps is forecast to rise 3.8 percent per year through 2013 to $6.8 billion. Federal regulations intended to reduce the energy consumed by lighting will spur demand for fluorescent lamps at the expense of conventional incandescent lamps. Fluorescent lamps’ higher cost will raise overall market value through 2013.

CFLs, halogen lamps to be fastest growing products

The Energy Independence and Security Act of 2007 will effectively ban the sale of general service incandescent lamps starting in 2012, and compact fluorescent lamps (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 decline, however, as CFLs last much longer than the incandescent lamps they will replace.

Halogen lamps are also forecast to grow especially fast through 2013, benefiting from the ban on general service incandescent lamps. Although less efficient and shorter-lived than CFLs, halogen lamps outperform CFLs in terms of color rendering, and they do not contain mercury. Demand for halogen lamps will also benefit from recovering production of motor vehicles, as halogen lamps find widespread use as headlamps.

Key building market to grow faster than average

Buildings account for the majority of lamp demand, and that market will grow faster than average through 2013. Residential buildings will largely be responsible for this growth, due to a surge in demand for CFLs as general service incandescent lamps are phased out of the market. However, demand in nonresidential buildings will also accelerate, as new federal regulations increasing the minimum efficiency of general use fluorescent lamps take effect in 2012. Although demand in the nonresidential market will be flat in unit terms, the new efficiency standards will increase the average cost of fluorescent lamps in 2013, thus raising market value.

LEDs pose serious threat to lamps in long term

Light-emitting diodes (LEDs) pose a serious threat to future lamp demand. Although their high price has limited usage in traditional lighting applications so far, technological innovations that reduce costs and improve performance will likely lead to the widespread adoption of LED-based lighting devices. In the long term, lamps are expected to lose market share to LEDs, especially in such markets as motor vehicles and nonresidential buildings.
MARKETS

Buildings

Demand for lamps in the buildings market totaled $3.2 billion in 2008, by far the largest market for lamps. Lamps are used to provide a safe and comfortable environment in virtually every type of building. The residential market accounted for the majority of lamp demand in buildings in 2008. This share is even higher when measured in unit terms due to the widespread use of low-cost conventional incandescent lamps in residential applications. The importance of the residential market reflects the sizable stock of residential buildings in use, as well as a consumer preference for a large number of light sources with relatively low light output. In contrast, the nonresidential market often specifies fewer lamps with greater light output.

Lamp demand in buildings is anticipated to grow at an average rate of 4.6 percent per year to $4.0 billion in 2013, driven by gains in the residential market. In contrast, lamp demand in the buildings market grew an average of 2.9 percent per year between 1998 and 2008. The projected acceleration is largely the result of demand for compact fluorescent lamps (CFLs) spurred by the Energy Independence and Security Act of 2007, which will phase out the sale of general use incandescent lamps starting in 2012. The acceleration is primarily due to consumer replacement of inexpensive conventional incandescent lamps with costlier and longer-lived fluorescent lamps, long-term demand will eventually fall to a lower level. The effects of this transition will be most salient in the residential market, while the nonresidential market grows at a slower (but more sustainable) pace.

Between 2008 and 2013, fluorescent lamps are expected to generate the greatest gains in value terms. Their share of the buildings market is projected to rise from 56 percent in 2008 to 80 percent in 2013. Demand for fluorescent lamps will be led by CFLs, as they replace general use incandescent lamps in many existing fixtures over the forecast period.
COMPANY PROFILES

Lights of America Incorporated
611 Reyes Drive
Walnut, CA 91789
909-594-7883
http://www.lightsofamerica.com

Annual Sales: $360 million (estimated)
Employment: 550 (estimated)
Key Products: compact fluorescent lamps, standard fluorescent lamps and light emitting diodes

Lights of America is a privately held manufacturer and distributor of lamps and lighting fixtures for residential and commercial applications. The Company procures lamps and light emitting diodes from overseas suppliers through such retailers as Wal-Mart Stores Incorporated (Bentonville, Arkansas), Home Depot Incorporated (Atlanta, Georgia) and Lowe’s Companies Incorporated (Mooresville, North Carolina). In addition to utilizing production and assembly activities at its Walnut, California headquarters site, Lights of America has a distribution facility in Philadelphia, Pennsylvania.

The Company is active in the US lamp industry through the production of compact fluorescent and standard fluorescent lamps, as well as light emitting diodes (LEDs). Compact fluorescent lamps are designed to replace most incandescent lamps and include general purpose types that can be used in downlighting, recessed lighting, fans and other applications. Specific products include TWISTER and MINI TWISTER spiral-shaped bulbs, which are produced in mushroom shapes, sunlight shades and other varieties. These lamps are designed to last between 6,000 and 10,000 hours and are produced in wattages ranging from 7 to 40. Additional compact fluorescent lamps from the.

“HID lamps are most popular in the outdoor lighting market, where their long operating lives, low energy consumption and ability to illuminate large areas from a distance outweigh the poor quality of light most HID lamps generate. Through 2013, demand for HID lamps is forecast to grow 5.5 percent per year to $1.1 billion, benefiting from relatively robust growth in the outdoor lighting market, and increasing market penetration in the motor vehicle market.”

--Section V, pg. 142
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