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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.

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Sample Text, Table & Chart

MARKETS

Buildings

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

Lamp demand in buildings is anticipated to grow

driven by gains in the residential market. In the buildings market grew an average of 1.5 percent between 1998 and 2008. The projected acceleration in demand for compact fluorescent lamps (CFLs) and the Energy Independence and Security Act of 2007, which requires general use incandescent lamps starting in 2009, 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.

TABLE IV-13

HALOGEN LAMP SUPPLY & DEMAND
(million dollars)

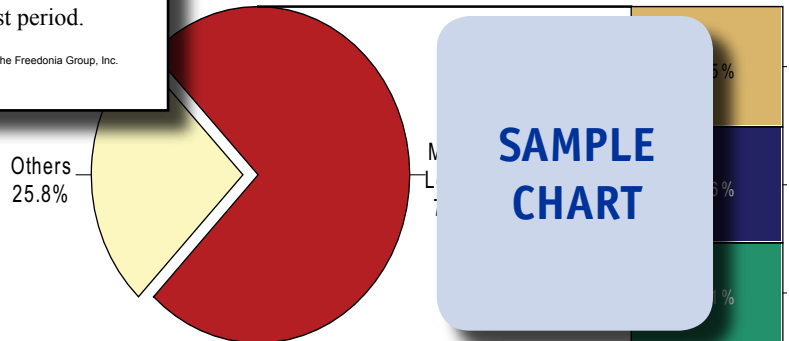
Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2000\$)	9,500	11,000	13,000	15,000	17,000
units/mil \$ GDP	0.0001	0.0001	0.0001	0.0001	0.0001
Halogen Lamp Demand (mil units)	10	10	10	10	10
\$/unit	100	100	100	100	100
Halogen Lamp Demand	1,000	1,000	1,000	1,000	1,000
Large Halogen Lamps	500	500	500	500	500
Miniature Halogen Lamps	500	500	500	500	500
- imports	0	0	0	0	0
+ exports	0	0	0	0	0
Halogen Lamp Shipments	1,000	1,000	1,000	1,000	1,000

SAMPLE TABLE

SAMPLE TEXT

CHART VII-1

LAMP MARKET SHARE, 2008
(\$5.7 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-8
HIGH INTENSITY DISCHARGE & OTHER DISCHARGE LAMP SUPPLY & DEMAND
 (million dollars)

Item	1998	2003	2008	2013	2018
Highway Noncapital Expend (bil 2000\$)/units/000\$ highway expenditures				5.5	2.6
HID & Other Lamps (mil units) \$/unit				30	31
HID & Other Lamp Demand High Intensity Discharge Other Electrical Discharge				40	15
- imports + exports				90	30
HID & Other Lamp Shipments				5	880



COMPANY PROFILES

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

Annual Sales
 Employment

Key Products
 and light



Lights of America is a manufacturer and distributor of lamps for commercial applications. The company sells 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

OTHER STUDIES

Circuit Breakers & Fuses

This study analyzes the US circuit breaker and fuse industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by product (e.g., molded case circuit breakers, power circuit breakers, high-power fuses, cartridge and plug fuses, electronic fuses) and market (e.g., electric power, building construction, machinery, electronics, automotive). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2583 11/2009..... \$4700

Advanced Lighting

US demand for advanced lighting is forecast to grow 10.9% yearly through 2013, spurred by a ban on incandescent lamps starting in 2012. Compact fluorescent lamps (CFLs) and light emitting diodes (LEDs) will grow the fastest, followed by advanced high-intensity discharge (HID) and halogen lighting. This study analyzes the \$4 billion US advanced lighting industry, with forecasts for 2013 and 2018 by product, market and region. It also evaluates company market share and profiles industry players.

#2486 04/2009..... \$4700

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

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