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Lighting Fixtures

US Industry Study with Forecasts for **2014 & 2019**

Study #2625 | April 2010 | \$4900 | 316 pages

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The fastest gains in demand are expected to be generated in the motor vehicle and residential markets, which will see an increase at double-digit annual rates from depressed 2009 levels.

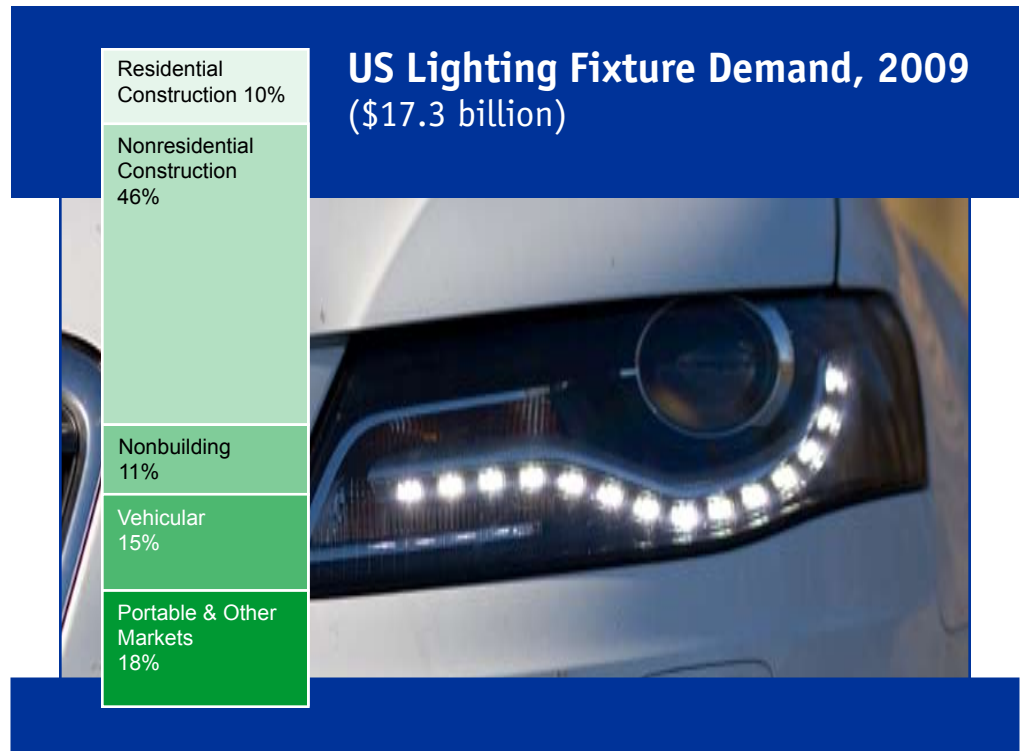
US demand to grow 4.8% annually through 2014

Demand for lighting fixtures in the US is forecast to grow 4.8 percent per annum to \$21.9 billion in 2014. This pace represents an acceleration from the weak lighting fixture demand increase that occurred between 2004 and 2009. Going forward, the fastest gains are expected to be generated by the motor vehicle and residential markets for lighting fixtures. In both of these markets, a recovery in activity from depressed 2009 levels will spur demand for lighting fixtures to increase at double-digit annual rates.

Motor vehicle market to grow the fastest

The motor vehicle market is projected to be the fastest growing source of demand between 2009 and 2014, doubling in size over that period. Nearly all of this growth will be attributable to the recovery of domestic motor vehicle production, which in 2009 declined to its lowest level in half a century. Because of the strong growth in the motor vehicle market, vehicular lighting fixtures are forecast to be the fastest growing lighting fixture product type through 2014.

The residential market for lighting fixtures is forecast to be the second fastest growing through 2014, as it rebounds from the losses it incurred between 2004 and 2009. The majority of this growth will be concentrated in new



single-family applications, as housing completions recover from the depressed 2009 level. Despite the strong growth forecast, residential demand for lighting fixtures in 2014 will remain below its 2006 level, when housing construction peaked.

LED-based fixtures to see especially strong growth

Throughout every major market segment, products that reduce the energy consumption of lighting will offer the best prospects for growth. Much of this can be attributed to regulations banning the future sale of less energy-efficient lighting products, including the Energy Independence and Security Act of 2007's

restrictions on the sale of incandescent lamps starting in 2012. The commercialization of light-emitting diode (LED) lighting is also having a significant impact on the industry. LEDs are longer-lived and more energy-efficient than incandescent lamps but currently only account for a small share of demand. LED-based lighting fixtures are expected to provide especially strong growth through 2014 due to the rapid pace of technological advances in these products, making them more energy-efficient, brighter and more affordable. Nonportable lighting fixtures are expected to provide the fastest gains for LED-based products as these fixtures find increasing use in general illumination applications.

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Sample Text, Table & Chart

MARKETS

Construction

Lighting fixture demand in construction markets is expected to advance 2 billion. improve housing tion reco 06 throu in new d Although applicati tions will Gains w by retrofit activities aimed at increasing the energy efficiency systems. Because many of these more advanced energy-efficient are more expensive, this trend will also benefit value gains. more, the ongoing trend toward the use of more aesthetically and thus more expensive, lighting fixtures will support dema

The nonbuilding lighting fixture market is forecast to grow roughly in line with the market average through 2014, although it will decelerate considerably from the strong growth achieved between 2004 and 2009. Nonresidential lighting fixtures, which accounted for about 70 percent of the construction market in 2009, are projected to be the slowest growing construction segment. Going forward, gains in the nonresidential building lighting fixture market will be constrained by industrial construction activity, which is expected to fall from its peak 2009 level.

In addition to discussions by construction type, it is also helpful to analyze the lighting fixture construction market in terms of new versus improvement and repair use. Use of fixtures as part of renovation dominates demand, accounting for over three-quarters in 2009. New construction applications will also lead growth, growing 3.8 percent per year to \$10.7 billion. Demand for improvement and repair applications will grow roughly in line with the pace experienced between 1999 and 2009. Improvement

122

TABLE III-11

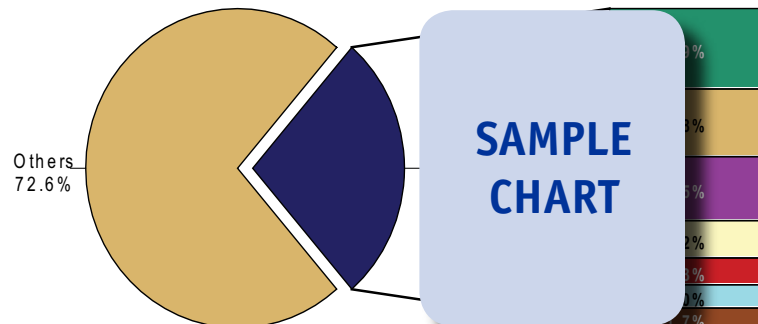
MOTOR VEHICLE LIGHTING FIXTURE DEMAND BY VEHICLE TYPE & LAMP TECHNOLOGY (million dollars)

Item	1999	2004	2009	2014	2019
Vehicular-Type Lighting Fixture Demand % motor vehicle					
Motor Vehicle Lighting Fixture Demand By Type:					
Parking, Tail & Interior					
Composite Headlamp					
Spot, Fog & Auxiliary					
By Lamp Technology:					
Conventional Incandescent					
Halogen					
LED85					
HID & Other					

SAMPLE TABLE

CHART VI-1

US LIGHTING FIXTURE MARKET SHARE BY COMPANY, 2009 (\$17.3 billion)

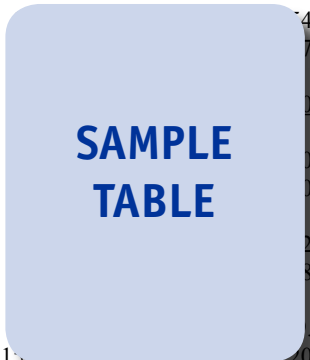


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-7
MIDWEST LIGHTING FIXTURE DEMAND
BY SUBREGION & MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Midwest GDP (bil \$)					40
\$ fixtures/000\$ GDP					74
Midwest Lighting Fixture Demand					00
By Subregion:					
East North Central					00
West North Central					00
By Market:					
Construction					20
Manufactured Goods					80
% Midwest Lighting Fixture Demand	15				00



COMPANY PROFILES

ALP Lighting Components Incorporated
 6333 Gross Point Road
 Niles, IL 60714
 773-774-9550
<http://www.alplighting.com>

Annual Sales
 Employment

Key Products: lighting components

ALP Lighting Components provides lighting components for the construction and manufacturing market industries. The Company...

The Company participates in the US lighting fixtures industry through the production of various lighting components, including fixtures, lenses, diffusers, reflectors, gasketed enclosures, louvers, baffles, and lampholders and other wiring devices. For example, fixtures include the STEEL CRAFT line of recessed, wraparound, linear, industrial, surface, high bay and strip lighting fixtures. Among specific fixtures are 2x2, 2x4 and narrow recessed lights; 370 wraparound lights with drilled endplates for decorative ends; PENDANT T8 linear direct/indirect lights designed to provide glare-free ambient lighting in offices, conference rooms, reception areas and classrooms; and CONCEPT 6 surface fixtures in 1x4, 2x2 and 2x4 configurations.

Other products from ALP Lighting Components' include the LEXALITE product line, which comprises precision injection molded refractors and reflectors. These products are offered for a variety of lighting fixtures, including indoor, outdoor, fluorescent, street, area, canopy, traffic signal, emergency, hazardous and vapor-tight luminaires.

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"Lighting fixture demand in the East North Central subregion is forecast to grow 8.1 percent annually to \$4.5 billion in 2014. Gains will be bolstered by the recovery of motor vehicle production. The East North Central boasts the largest manufacturing base for motor vehicles in the nation, generating significant demand for vehicular lighting fixtures. As a result, ..."

--Section V, pg. 187

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OTHER STUDIES

World Electric Lighting

Global demand for electric lighting is forecast to climb 4.5% annually through 2014. Gains in developing countries will outpace sales in the US, Western Europe and Japan. China alone will account for nearly half of all new product demand through 2014. LEDs will record the fastest market gains. This study analyzes the \$6.8 billion world electric lighting industry, with forecasts for 2014 and 2019 by product, market, world region and for 26 countries. It also evaluates company market share and profiles industry participants.

#2708December 2010 \$5900

World Lighting Fixtures

Global lighting fixture demand will climb 5.8% annually through 2014. China will account for one-third of all new demand, surpassing the US to become the largest market. Vehicular lighting will grow the fastest based on increasing motor vehicle output and a shift toward more expensive units. This study analyzes the \$96 billion world lighting fixture industry, with forecasts for 2014 and 2019 by product, market, world region and for 24 countries. It also evaluates company market share and profiles industry competitors.

#2684September 2010..... \$6100

Automotive Aftermarket in North America

The aftermarket for light vehicle components in North America will increase 2.9% annually through 2014. Mechanical products will remain the largest category while electronics grow the fastest. The dominant professional service provider segment will outpace the DIY market. This study analyzes the \$66 billion automotive aftermarket in North America, with forecasts for 2014 and 2019 by country (US, Canada, Mexico) and product. It also evaluates company market share and profiles industry participants.

#2606March 2010..... \$4800

Circuit Breakers & Fuses

US circuit breaker and fuse demand will reach \$3.8 billion in 2013. Residential construction will be the fastest growing market while electric power will remain the largest. High-power fuses will lead gains based on their intense use in electric utilities and wind farm step-up transformers. Molded case types will pace growth among circuit breakers. This study analyzes the US circuit breaker and fuse industry, with forecasts for 2013 and 2018 by product and market. It also evaluates company market share and profiles industry players.

#2583November 2009..... \$4700

Lamps

US demand for lamps is forecast to rise 3.8% annually through 2013. Gains will be driven by federal regulations aimed at replacing conventional incandescent lamps with higher cost fluorescent lamps. Halogen lamps are also forecast to grow especially fast, benefiting from the ban on general service incandescent lamps. This study analyzes the \$5.7 billion US lamp industry, with forecasts for 2013 and 2018 by lamp type and market. It also evaluates company market share and profiles industry players.

#2549September 2009..... \$4800

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