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# World Lighting Fixtures

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

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Study #2684 | September 2010 | \$6100 | 463 pages

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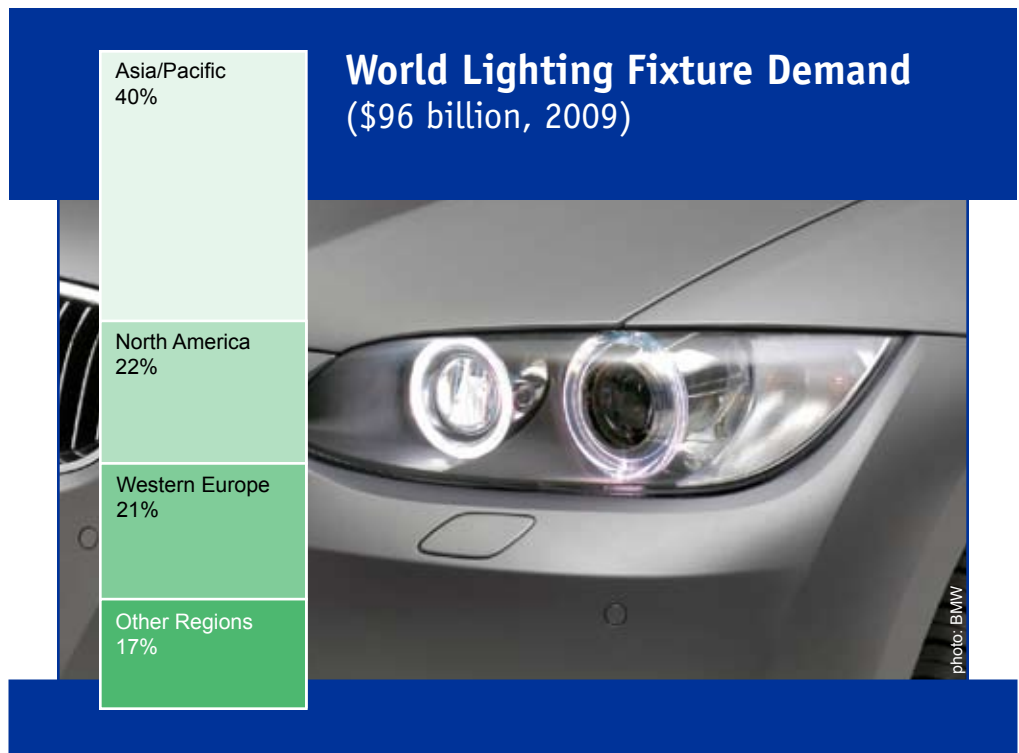
*Product sales will be driven by a strong rebound in motor vehicle output, an acceleration in residential building construction activity and continued growth in nonbuilding construction expenditures.*

## Global demand to climb 5.8% yearly through 2014

Global demand for lighting fixtures is projected to climb 5.8 percent annually through 2014 to \$127.5 billion. Product sales will be driven by a strong rebound in motor vehicle output, an acceleration in residential building construction activity and continued growth in nonbuilding construction expenditures. China alone will account for one-third of all additional demand through 2014, surpassing the US to become the largest lighting fixture market in the world. Sales gains are also expected to be healthy in lower-volume markets such as Thailand, India, Russia, Vietnam, Turkey, Mexico and Indonesia. Increases will generally not be as robust in developed areas, although some countries there will benefit from a strong upturn in automotive industry production after a period of decline. Sales of lighting fixtures in developed areas will also be spurred by an acceleration in economic growth and higher per capita incomes, leading to a pickup in consumer spending and renewed strength in residential building construction activity.

## Vehicular fixtures to be fastest growing types

Vehicular fixtures will record the fastest market gains of any major product segment through 2014, stimulated by increases in global motor vehicle output and supported by a shift in the product mix toward more expensive units,



including high intensity discharge and light-emitting diode (LED) lighting fixtures. Because of the anticipated recovery in motor vehicle production in countries such as Canada, France, Italy, the UK and the US -- all of which have registered substantial drops in automotive output in recent years -- vehicular lighting fixture sales advances in these areas will be more robust than in many developing nations. Nonportable outdoor fixture demand will expand at the next fastest rate, fueled by ongoing nonbuilding construction growth and an acceleration in residential building construction. Efforts to increase the energy efficiency of lighting equipment already in place will contribute to sales growth for both indoor and outdoor lighting equipment.

## Manufactured goods to be fastest growing market

The construction market for lighting fixtures -- which includes nonportable types used in buildings and nonbuilding applications -- is dominant. However, manufactured goods lighting fixture demand will post faster gains through 2014, bolstered by renewed strength in motor vehicle production and a generally favorable outlook for other types of vehicular equipment. In addition, an acceleration in new housing construction activity will help boost sales of table lamps and other portable fixtures, fixtures built into furniture and appliances, and separately sold parts and accessories.

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**Sample Text,  
 Table & Chart**

**MARKETS**

**India: Lighting Fixture Outlook & Suppliers**

Demand for lighting fixtures in India is forecast to increase annually through 2014 to \$4.4 billion, remaining one of the highest growth rates of any country in the world. Gains will be driven by increasing industrialization efforts, leading to increased construction activities and lighting fixture sales. Government efforts to improve conditions in rural areas through programs like the Golden Jubilee Housing Finance Scheme and Pradhan Mantri Adarsh Gram Yojana will also contribute to future lighting fixture market advances. In 2009, the federal government has announced plans to build 35,000 km of highway between 2009 and 2014 through the National Highways Development Programme. However, motor vehicle and motor vehicle production growth will moderate, and overall lighting fixture sales will also be constricted by international competition for investment due to generally healthy economic and construction market climates in other parts of the Asia/Pacific region.

The most robust sales growth among major product segments will be registered by nonportable outdoor fixtures, reflecting the above-average gains expected for nonbuilding construction spending. Portable outdoor fixtures will post the smallest annual market advances through 2014, but will be benefited by a shift in the product mix toward nonbuilding construction and rural electrification rates continuing to rise.

Production by facilities in India are projected to rise to \$4.4 billion in 2014, matching in value domestic demand but not expanding fast enough to prevent a trade surplus in these products from widening. Output gains supported by a predominantly favorable local sales environment and India's strong market advances will also attract additional capital from foreign suppliers, which will restrain industry production.

**TABLE VI-10**

**INDIA LIGHTING FIXTURE DEMAND BY PRODUCT & MARKET  
 (million dollars)**

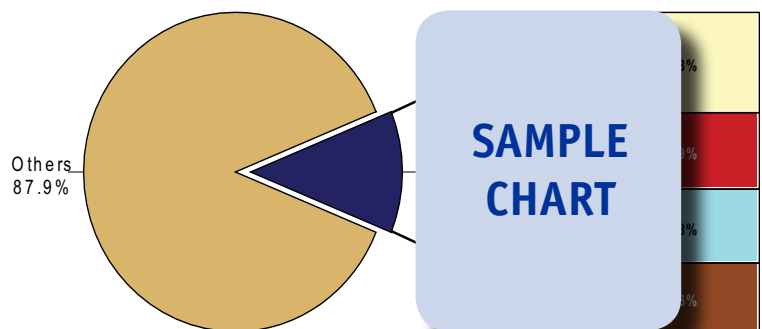
Item	1999	2004	2009	2014	2019
Asia/Pacific Lighting Fixture Demand	10	16	20	26	30
% India					
India Lighting Fixture Demand	0	0	0	0	0
By Product:					
Nonportable	0	0	0	0	0
Indoor	0	0	0	0	0
Outdoor	0	0	0	0	0
Vehicular	0	0	0	0	0
Portable	0	0	0	0	0
Parts & Accessories	0	0	0	0	0
By Market:					
Construction	0	0	0	0	0
Manufactured Goods	0	0	0	0	0

**SAMPLE  
 TABLE**

**SAMPLE  
 TEXT**

**CHART VIII-1**

**WORLD LIGHTING FIXTURE MARKET SHARE BY COMPANY  
 (\$96 billion, 2009)**



**SAMPLE  
 CHART**

**Sample Profile,  
 Table & Forecast**

**TABLE VI-9**  
**INDIA LIGHTING FIXTURE SUPPLY & DEMAND**

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)	100	150	200	250	300
per capita GDP	1000	1500	2000	2500	3000
Population (million persons)	1000	1100	1200	1300	1400
Personal Consumption Expend (bil 2008\$)	50	70	90	110	130
Construction Expenditures (bil 2008\$)	10	15	20	25	30
Motor Vehicle Production (000 units)	100	150	200	250	300
\$ lighting/000\$ GDP	0.1	0.15	0.2	0.25	0.3
\$ lighting/capita	100	150	200	250	300
Lighting Fixture Demand (mil \$)	100	150	200	250	300
net exports	10	15	20	25	30
Lighting Fixture Shipments (mil \$)	110	165	220	275	330
% India	10	15	20	25	30
A/P Lighting Fixture Shpts (mil \$)	190	250	310	375	440

**SAMPLE  
 TABLE**

**COMPANY PROFILES**

---

**Odelic Company Limited**  
 1-17-5 Miyamae  
 Suginami-ku 168  
 Japan  
 813-3332-1111  
 http://www.odelic.co.jp

Sales: \$  
 Employe

**SAMPLE  
 PROFILE**

Key Pro... for residential and  
 commerc

Ode... fixtures and related  
 equipmen... through four Japanese  
 subsidiaries: Japan Lighting Limited, Oderikku Trade Company Ltd.,  
 Arumotekonosu Incorporated and Yamagata Oderikku Incorporated.

The Company is active in the global lighting fixture industry through the manufacture of indoor and outdoor lighting fixtures for residential and commercial applications. Among Odelic's lighting fixtures are downlights; spotlights; chandeliers; pendants; bollards; and wall- and ceiling-mounted, accent, indirect, in-ground, recessed, and post-top luminaires. These products utilize light-emitting diode, fluorescent, incandescent and high-pressure discharge light sources. The Company markets lighting fixtures under such brand names as TENERRA, NERO, ASTRO, MADURA, PIANTA, GRATA, CURIO, DUETTO and SIROTAE.

In Japan, the Company operates production facilities in Yamagata and Hamura, and distribution centers in Yamagata, Nishinomiya and

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"India is the fourth largest producer of lighting fixtures in the region behind China, Japan and South Korea, with 2009 shipments of \$2.8 billion. As in many other parts of the world, small and mid-sized companies account for much of the industry output. The nation is a small net importer of lighting fixtures, with a 2009 trade deficit equivalent to two percent of domestic lighting fixture sales."

--Section VI, pg. 170



**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 details company market share and profiles industry participants. #2708 .....December 2010 ..... \$5900

**Sensors**

Demand for sensors in the US will rise 6.1% annually to 2014. The motor vehicle market will grow the fastest based on a rebound in motor vehicle production and the rising use of newer sensor-laden systems. Proximity and positioning and chemical property sensors will be the fastest growing types. This study analyzes the \$9.7 billion US sensors industry, with forecasts for 2014 and 2019 by product and market. The study also reviews sensor technology, evaluates company market share and profiles industry competitors. #2662 .....September 2010..... \$4900

**Lighting Fixtures**

Lighting fixture demand in the US is forecast to grow 4.8% annually through 2014. The fastest gains will occur in the motor vehicle and residential markets, which will increase at double-digit rates from depressed 2009 levels. LED-based lighting fixtures will provide exceptionally strong growth, especially in nonportable types. This study analyzes the \$17.3 billion US lighting fixture industry, with forecasts for 2014 and 2019 by product, market and region. It also evaluates company market share and profiles industry players. #2625 .....April 2010 ..... \$4900

**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. #2583 .....November 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. #2549 .....September 2009..... \$4800

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