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World Electric Lighting

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

Study #2708 | December 2010 | \$5900 | 428 pages

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Product sales will be driven by an acceleration in economic and personal income growth, a strong rebound in global motor vehicle output and a pickup in construction activity.

Global demand to climb 4.5% yearly through 2014

World demand for electric lighting is projected to climb 4.5 percent annually through 2014 to \$38.5 billion. Product sales will be driven by an acceleration in economic and personal income growth, a strong rebound in global motor vehicle output and a pickup in construction activity. Increases will be even stronger in price-adjusted terms, averaging 7.1 percent per year through 2014. Overall electric lighting prices are expected to drop as compact fluorescent lamp (CFL) and light-emitting diode (LED) costs decline and these products take share away from other lighting types, dampening dollar gains. Looking further ahead, growth in electric lighting demand is expected to slow noticeably in value terms from 2014 to 2019. This will be due in part to an ongoing shift in demand toward LED lighting devices, prices for which will continue to drop at double-digit annual rates. In addition, greater use of LEDs, CFLs and other long-lasting lighting products will reduce the need to buy replacement units.

Developing areas to outpace industrialized markets

Market gains in developing countries will outpace electric lighting sales in the US, Western Europe and Japan, fueled by healthy economic growth, ongoing industrialization efforts, increased manufacturing output, new household formation activity and rising standards of living. China alone will account for 47

World Electric Lighting Demand (\$38.5 billion, 2014)



Asia/Pacific
49%

North America
20%

Western Europe
14%

Other Regions
17%

percent of all additional product demand through 2014, strengthening its position as the largest electric lighting market in the world. Growth is also expected to be healthy in India and in lower-volume markets like Thailand, Vietnam, Malaysia, Turkey and Egypt. Although sales advances will not be nearly as strong as in developing areas, electric lighting demand in developed parts of the world will climb as well through 2014, bolstered by a strong upturn in motor vehicle production after a period of decline. Sales of electric lighting in developed areas will also be stimulated by an acceleration in economic growth and higher per capita income, leading to a pickup in consumer spending and renewed strength in fixed investment activity.

LEDs to grow the fastest

LED (or solid-state) lighting devices will record the fastest market gains of any major product segment through 2014. Historically, demand for LEDs used in lighting applications has been restrained by both high product prices and technical deficiencies such as quality and diffusion of light. However, the rapid rate of technological advances is dramatically improving their performance capabilities and resulting in substantial reductions in cost, which will lead to LED use in a growing number of lighting applications. CFL demand will expand at the next fastest pace, spurred by government-led efforts to phase out use of general service incandescent lamps.

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

India: Electric Lighting Outlook & Suppliers

Demand for electric lighting in India is forecast to increase annually through 2014 at one of the highest growth rates of any nation in the world. This is driven by industrialization efforts, leading to an exponential increase in the numbers of buildings and other structures, and the resulting increase in product sales. Government efforts to improve electricity supply in rural areas through programs such as the Rural Electrification Finance Scheme and Pradhan Mantri Gram Sadak Yojana will contribute to future electric lighting market advances. In addition, the federal government has announced plans to build 35,000 kilometers of highway between 2009 and 2014 through the National Highway Development Programme. However, motor vehicle and motorcycle growth will moderate, and overall lighting product sales gain will be constricted by international competition for investment funds. Despite a generally healthy economic and construction market climate in parts of the Asia/Pacific region.

The most robust market growth among major product segments will be posted by LED lighting devices, stimulated by further performance improvements and rapidly falling prices. Nevertheless, LEDs will continue to account for a modest share of Indian electric lighting demand, while fluorescents will make up 47 percent of all dollar sales. Compact fluorescent lamps will register the smallest annual market advances in percentage terms, negatively impacted by a shift in the product mix toward CFLs and other longer-lasting, energy-efficient types as income levels and rural electrification rates climb. Government efforts to stimulate and reduce carbon emissions by limiting the utilization of incandescent lamps, as exemplified by the state of Tamil Nadu's banning of incandescent use in government facilities and institutions supported by government aid, will also dampen sales growth in this product segment.

180

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**SAMPLE
 TEXT**

TABLE VI-7

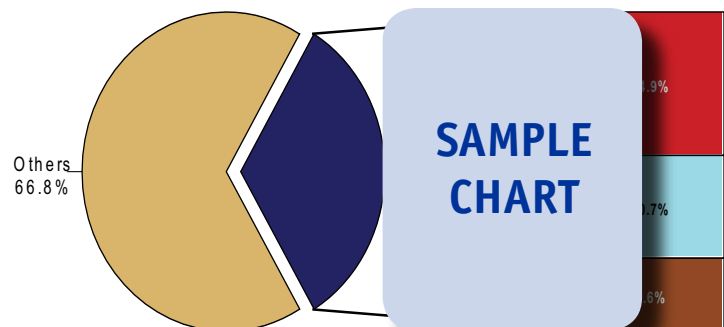
**INDIA
 ELECTRIC LIGHTING SUPPLY & DEMAND**

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008\$)	15	20	25	30	35
per capita GDP	100	120	140	160	180
Population (million persons)	1000	1100	1200	1300	1400
persons/household	7	7	7	7	7
Households (mil units)	140	150	160	170	180
Personal Consumption Expend (bil 2008\$)	5	6	7	8	9
Construction Expenditures (bil 2008\$)	0	0	0	0	0
Motor Vehicle Production (000 units)	0	0	0	0	0
Motor Vehicles in Use (mil units)	0	0	0	0	0
\$ electric lighting/mil \$ GDP	4	4	4	4	4
\$ electric lighting/capita	7	7	7	7	7
Electric Lighting Demand (mil \$)	0	0	0	0	0
net exports	0	0	0	0	0
Electric Lighting Shipments (mil \$)	0	0	0	0	0
% India	2	2	2	2	2
Asia/Pacific Elec Lighting Shpts (mil \$)	0	0	0	0	0

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD ELECTRIC LIGHTING MARKET SHARE BY COMPANY
 (\$30.9 billion, 2009)**



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VI-7
INDIA ELECTRIC LIGHTING DEMAND BY PRODUCT & MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Asia/Pacific Electric Lighting Demand	500	600	700	800	900
% India	10	12	14	16	18
India Electric Lighting Demand	50	72	98	128	162
By Product:					
Fluorescent	10	15	20	25	30
Incandescent	30	45	60	75	90
Light-Emitting Diode	5	10	15	20	25
High Intensity Discharge & Other	5	10	15	20	25
By Market:					
Structures	10	15	20	25	30
Motor Vehicles & Other Mfd Goods	40	57	78	103	132

**SAMPLE
TABLE**

COMPANY PROFILES

Epistar Corporation
 5 Li-hsin 5th Road, Science-based Industrial Park
 Hsinchu 300
 Taiwan
 886-3-578-...
 http://www...

**SAMPLE
PROFILE**

Sales: US\$...
 Employment ...

Key Product ... for lighting and other applic...

Epistar develops and produces high-brightness light-emitting diodes (LEDs). The Company is privately held.

The Company is active in the world electric lighting industry through the production of LEDs using its proprietary metal organic vapor phase epitaxy technology. These LEDs are designed to offer compact size, low power consumption and long product life properties, and can be used in scanner, automotive interior and exterior lighting, liquid crystal display backlighting, indoor and outdoor display, traffic signal, consumer electronics indicator, and general illumination applications, among others. High-brightness LEDs available from Epistar include indium gallium nitride and aluminum gallium indium phosphide types that are marketed under such brand names as AQUARIUS and AX.

Manufacturing operations for Epistar are conducted at its headquarters facility in Hsinchu, Taiwan. In addition, the Company manufactures LEDs for Toyoda Gosei Company Limited (Japan), a manufacturer of LEDs and other products for automotive applications, via contract.

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“Shipments of electric lighting by facilities in India are projected to rise 8.6 percent per year to \$1.8 billion in 2014, approximating increases in domestic demand but not expanding fast enough to prevent the country’s trade deficit in these products from widening. Output gains will be supported by a predominantly favorable local sales environment. However, India’s strong market advances will also attract additional competition from foreign suppliers, which will ...”
 --Section VI, pg. 181

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OTHER STUDIES

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.

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

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

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

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 April 2009 \$4700

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