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# Lamps

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US Industry Study with Forecasts for **2010 & 2015**

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**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

[www.freedoniagroup.com](http://www.freedoniagroup.com)

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*Compact fluorescent lamps (CFLs) and halogen lamps are expected to replace most incandescents, but light emitting diodes will pose a serious threat to lamp demand in the long term.*

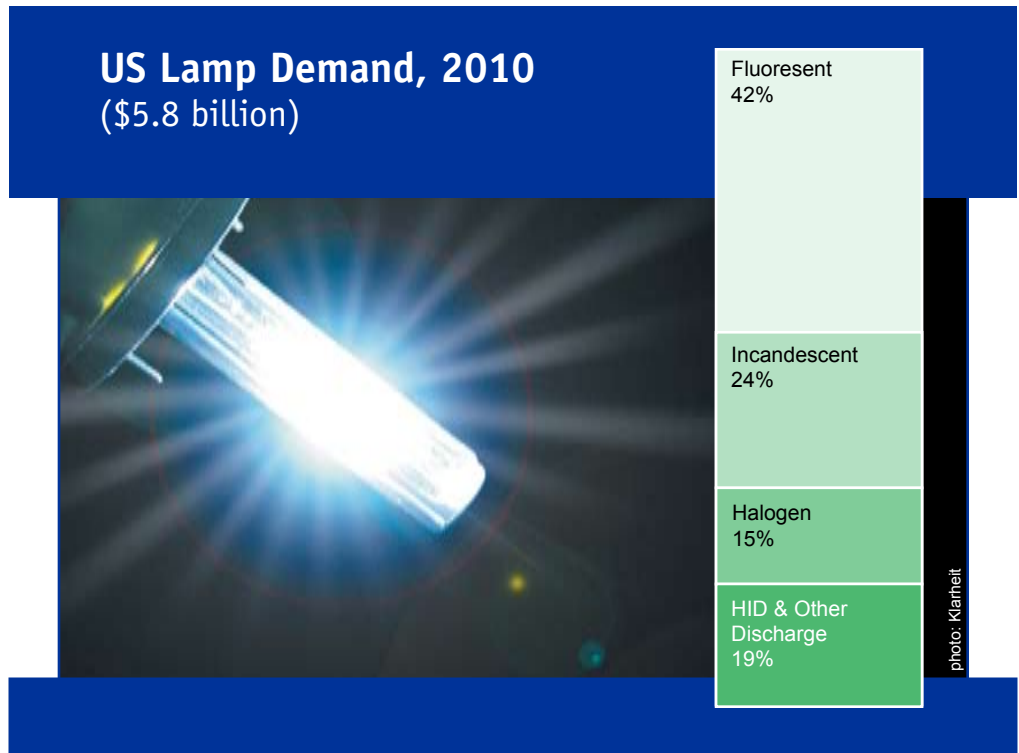
## US demand to reach \$6.1 billion in 2015

US demand for lamps is projected to decline nearly two percent annually in unit terms through 2015 as the market adjusts to the regulations which will effectively ban the sale of general service incandescent lamps starting in 2012. Compact fluorescent lamps (CFLs) and halogen lamps are expected to replace most incandescents. Since both CFLs and halogen lamps have much longer lives than incandescent lamps, the average replacement rate for lamps will decrease over time, depressing unit demand. However, because both CFLs and halogen lamps are more expensive than the incandescent lamps they will replace, the value of the lamp market is expected to increase 1.1 percent annually to \$6.1 billion in 2015.

Light emitting diodes will pose a serious threat to lamp demand in the long term. 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 as an alternative to lamps.

## Halogen lamps to see the fastest demand increases

Halogen lamps are expected to see the strongest demand increases through 2015, rising at a double-digit annual rate. These lamps are the most similar to



traditional incandescents and will benefit from consumer familiarity, low initial cost and good light quality. In addition, an increase in motor vehicle production will spur halogen headlight demand. However, halogen lamps are less efficient and shorter-lived than LEDs and will face strong competition from these products over the longer term.

Demand for fluorescent lamps is projected to increase 1.7 percent annually to \$2.7 billion in 2015, a deceleration from the rapid pace achieved between 2005 and 2010. Much of the gains in that period were in CFLs, which made strong advances in the residential market from a small initial base. While CFL demand will continue to benefit from increased

efficiency standards and the replacement of incandescent lamps, the market for these lamps is maturing and, over the longer term, will decline due to competition from LEDs.

Through 2015, demand for high intensity discharge and other discharge lamps is forecast to rise 2.3 percent per year to \$1.2 billion. These products will benefit from relatively robust growth in the outdoor lighting market, and increasing market penetration in the motor vehicle market. However, preventing even more rapid growth will be the expected moderation in prices for many types of electric discharge lamps.

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## Sample Text, Table & Chart

### FILAMENT LAMPS

#### Halogen Lamps

In 2010, halogen lamp demand totaled \$870 million, of total lamp demand. Through 2015, demand for halogen lamps is forecast to increase 33 percent per annum to \$1.15 billion. A market upswing in halogen lamps is expected with an anticipated phase out of traditional incandescent lamps for vehicle products through 2015. Halogen lamps are similar to traditional incandescent lamps but have a higher initial price which facilitates growth and extends lamp life.

**SAMPLE TEXT**

Demand for halogen lamps will grow the fastest in the residential market as a result of provisions in the EISA that will ban the manufacture and sale of traditional incandescent lamps in the US beginning in 2012. Sales of halogen lamps in the residential market are forecast to increase 33 percent per annum through 2015. Halogen lamps produce a quality of light very similar to traditional incandescent lamps at a lower initial price than any other advanced lighting product. These features will lead to a dramatic increase in unit demand for halogen lamps as many residential consumers will seek to replace their traditional incandescent lamps with the most similar, least expensive lighting option.

In 2010 and years prior, the motor vehicle market accounted for the largest share of halogen lamp demand. Halogen lamps, which have been the standard headlamp type in the US since the 1980s, find a considerable amount of use in the motor vehicle market. Over the past decade, halogen headlamps have gradually lost market share to metal halide products, which offer superior visibility, but at a greater initial price. Looking forward, a number of other halogen lamps in vehicular applications will face rising competition from LED lighting products. Despite replacement by LEDs, halogen demand will be supported by an increase in the manufacture of motor vehicles, as the US motor vehicle industry rebounds from its recessionary lows.

148

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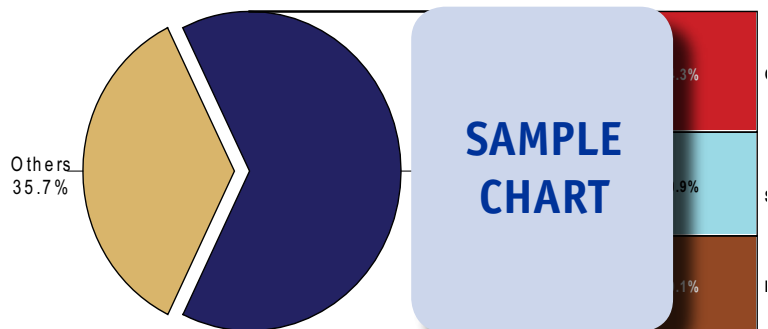
**TABLE V-3**  
**LARGE INCANDESCENT LAMP DEMAND BY TYPE**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Building Stock (bil 2005\$)	200	200	200	200	200
units/mil \$ stock					
Large Incandescent Lamps (mil units)					
\$/unit					
Large Incandescent Lamp Demand					
General Use					
Reflector					
Decorative					
Other					
% large Incandescent Lamp Demand					

**SAMPLE TABLE**

**CHART VII-1**

**US LAMP MARKET SHARE BY TOP COMPANIES**  
 (\$5.8 billion, 2010)

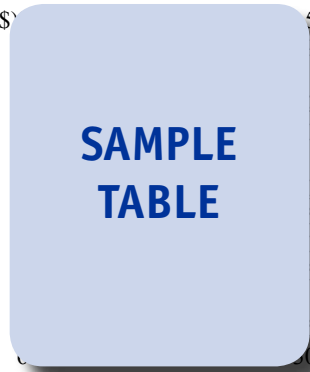


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE IV-9**  
**HIGH INTENSITY DISCHARGE LAMP DEMAND BY TYPE**  
 (million dollars)

Item	2000	2005	2010	2015	2020
Highway Noncapital Expend (bil 2005\$) units/000\$ highway expenditures					
HID Lamp Demand (mil units) \$/unit					
HID Lamp Demand Metal Halide					
Sodium Vapor					
Mercury Vapor					
% HID					
HID & Other Lamp Demand					



**COMPANY PROFILES**

**EiKO Limited**  
 23220 West 84th Street  
 Shawnee, KS 66227  
 913-441-8500  
 http://www.eiko.com

Annual Sales:  
 Employment:

Key Products: compact fluores-  
 cent, high intensity emitting diode  
 lighting

**SAMPLE PROFILE**

EiKO manufactures lamps and related products for general lighting, audio/visual, photographic, health care, automotive, electronic, industrial, electrical and other applications. EiKO is privately held.

The Company participates in the US lamp industry via the manufacture of incandescent, halogen, standard and compact fluorescent, high intensity discharge (HID), light emitting diode (LED) and specialty lamps. These lamps are produced in a wide range of wattages, base styles and glass finishes. Manufacturing operations for EiKO are conducted at its headquarters facility in Shawnee, Kansas. In addition, the Company maintains US distribution sites in Reno, Nevada and Pennsauken, New Jersey.

Incandescent lamps from the Company include standard and silicone-coated rough services A-line types for general illumination applications; vibration-resistant fan bulb lamps; C- and S-shaped, globe, bent tip and torpedo decorative lamps; T-shaped miniature lamps for exit sign, indicator and related applications; and R and BR spot and flood lamps. EiKO's halogen lamps encompass SOLUX true daylight,

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"Through 2015, lamp demand in buildings is expected to increase 1.0 percent annually to \$3.7 billion. Gains will be supported by an improved outlook for construction in many building segments and a continued shift to higher-value, more efficient lamp products. However, because many of these higher-value products also have longer lives than the lamps that they are replacing, the shift in demand is expected to ..."

--Section VI, pg. 167



**OTHER STUDIES**

**Advanced Lighting**

US demand for advanced lighting is forecast to increase 9.3 percent per annum through 2015. A government-mandated phaseout of incandescent lamps and projected lower costs for advanced lighting will drive gains. Light emitting diodes (LEDs) will remain the fastest growing type and take market share from compact fluorescent lamps (CFLs) and halogen lamps. This study analyzes the \$7.2 billion US advanced lighting industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2743 ..... May 2011 ..... \$4900

**World Electric Lighting**

Global demand for electric lighting is forecast to climb 4.5 percent 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.

#2708 ..... December 2010 ..... \$5900

**World Lighting Fixtures**

Global lighting fixture demand will climb 5.8 percent 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 percent annually through 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 percent 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

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