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Lighting Fixtures

Industry Study with Forecasts for **2016 & 2021**

Study #2862 | April 2012 | \$5100 | 365 pages

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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

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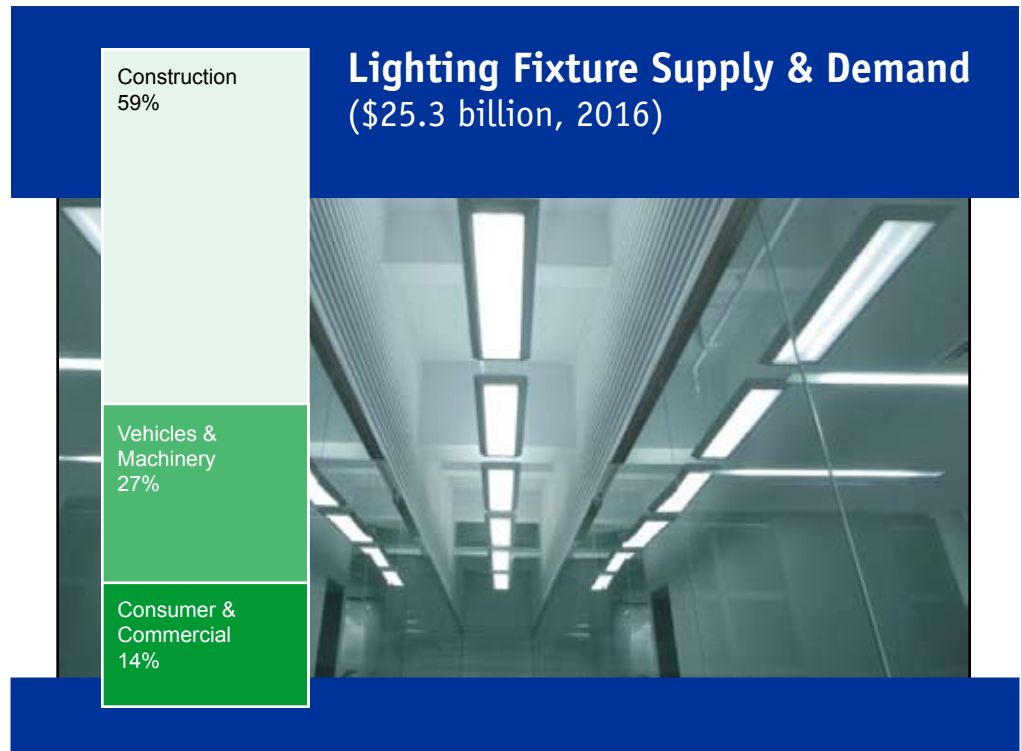
Acceptance of light emitting diodes (LEDs) over less efficient incandescent lamps, along with a rebound in building construction and motor vehicle production, will fuel lighting fixture gains.

US demand to grow 7.5% annually through 2016

US demand for lighting fixtures will grow 7.5 percent annually to \$25.3 billion in 2016, recovering from the declines of the 2006-2011 period. An expected rebound in building construction activity and a stronger outlook for motor vehicle production will be important drivers for the lighting fixture market. Demand will also benefit from the greater use of lighting fixtures that are specifically designed for energy-efficient light sources such as light emitting diodes (LEDs).

Consumer acceptance, regulatory efforts to benefit LED lighting use

The commercialization of LED lighting will continue to have a significant impact on the industry. LEDs are longer-lived and more energy efficient than incandescent lamps, but fixtures designed for use with LEDs currently account for less than 10 percent of lighting fixture demand. In part, this reflects efforts by producers of LED light sources to ease consumer acceptance by developing LED lamps that fit into traditional incandescent fixtures. However, greater consumer acceptance of LED lighting and regulatory efforts such as the efficiency standard set by the Energy Independence and Security Act of 2007 will spur greater usage of LED light sources. In turn, this growing LED use will naturally support efforts by lighting producers to develop fixtures designed specifically for LEDs. In addition, technological advances to



increase the efficiency, brightness, and affordability of LED light sources, will support strong demand growth for LED light fixtures in every major market.

Construction applications largest, fastest growing

Construction applications account for the majority of lighting fixture demand and through 2016 are expected to exhibit the most rapid growth of any major market. Lighting fixtures are widely utilized in residential and nonresidential buildings, as well as in nonbuilding settings such as roadways, marinas, docks, and quarries. The residential market is forecast to register the strongest gains in percentage terms, driven by the rebound in housing construction from a low 2011

base. In addition, the increase in home sales and rising concerns about energy efficiency will spur residential improvement and repair demand for lighting fixtures. The large nonresidential market for lighting fixtures will also experience strong growth through 2016. While not as fast in percentage terms, the large size of the nonresidential market means that this segment will provide the best overall opportunities.

In addition to construction applications, lighting fixtures are used in vehicles and machinery as well as in consumer and commercial settings. Gains in the vehicle and machinery market will be supported by a rebound in motor vehicle production and strength in shipments of aerospace and other transportation equipment.

Sample Text, Table & Chart

MARKETS

Table Lamps, Floor Lamps & Other Portable Fixture

The consumer and commercial market also includes a number of portable lighting products other than flashlights. The most common products are desk lamps, table lamps, and floor lamps used in residential and commercial settings. However, this segment of the market also includes a range of specialty and novelty lights, including landscape lighting products, nightlights, bicycle lights, book lights, and portable lighting products designed to be worn (e.g., lights used by miners to provide safety and miner's headlamps).

Demand for table, floor, and other portable lighting products is driven by consumer and commercial markets. Demand is expected to grow at an annual rate of 4.1% per annum to 2021. Growth is driven by construction and in commercial settings. Growth, since 2001, has been important to the market for portable lighting products because of the innovative nature of many of the products and, since 2001, changing portable lighting products have become a way to change the decor of a room.

The market diversity and to some extent the low cost of many portable fixtures somewhat insulate demand for these products from economic cycles, although the commercial segment of the market does tend to be more sensitive to the economic outlook than households. In addition, the market experiences large shifts in product mix as a result of changing consumer preferences. A portion of these variations are a result of changing home decor trends, which result in elevated sales of particular fixtures with specific design characteristics.

A product development trend affecting this market is the introduction of portable lighting products using LEDs. A variety of lighting products based on LED technologies are available, including clip-on lights.

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TABLE III-6

MOTOR VEHICLE LIGHTING FIXTURE DEMAND BY TYPE & LIGHT SOURCE (million dollars)

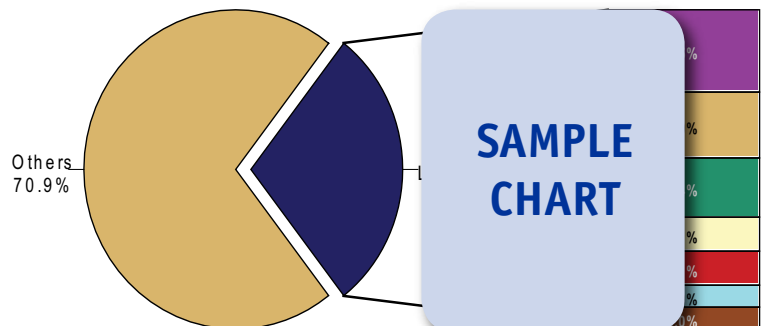
Item	2001	2006	2011	2016	2021
Vehicular-Type Lighting Fixture Demand	70	73	77	81	85
% motor vehicle	1.2	1.2	1.2	1.2	1.2
Motor Vehicle Lighting Fixture Demand	70	73	77	81	85
By Type:					
Parking, Tail, & Interior	30	31	32	33	34
Composite Headlamp	20	21	22	23	24
Spot, Fog, & Auxiliary	20	21	23	25	27
By Light Source:					
Conventional Incandescent	40	41	42	43	44
Halogen	10	11	12	13	14
LED	10	11	12	13	14
HID & Other	10	11	13	15	17

SAMPLE TABLE

SAMPLE TEXT

CHART VI-1

LIGHTING FIXTURE MARKET SHARE BY COMPANY, 2011 (\$17.6 billion)

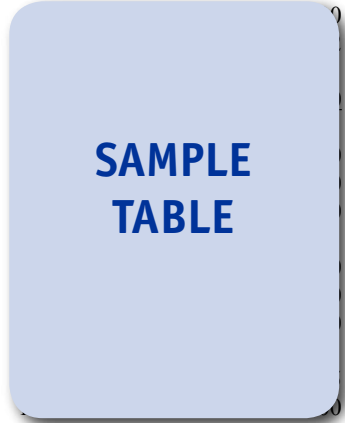


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-8
SOUTH LIGHTING FIXTURE DEMAND
BY SUBREGION & MARKET
 (million dollars)

Item	2001	2006	2011	2016	2021
South GDP (bil \$)					
\$ fixtures/000\$ GDP					
South Lighting Fixture Demand					
By Subregion:					
South Atlantic					
East South Central					
West South Central					
By Market:					
Construction					
Vehicles & Machinery					
Consumer & Commercial					
% South Lighting Fixture Demand					



COMPANY PROFILES

ALP Lighting Components Incorporated

6333 Gross Point Road
 Niles, IL 60714
 773-774-0000
 http://www.alplighting.com

Annual Sales
 Employment

Key Products

ALP Lighting Components is a manufacturer of lighting components for the original equipment manufacturer and aftermarket industries. The Company is privately held.

The Company participates in the US lighting fixtures industry through the manufacture and marketing of original equipment manufacturer and aftermarket manufacturer lighting products, including fixtures, lenses, extruded sheet parts, vapor-proof enclosures, unwired fixture bodies, louvers, baffles and reflectors. The components are designed for florescent, high intensity discharge (HID) and light-emitting diode applications.

Product lines include STEEL CRAFT and LEXALITE. STEEL CRAFT fluorescent fixtures include industrial, strip, recessed, wrap-around, surface, linear and high-bays types. For example, STEEL CRAFT RDIALP-2X2M is a recessed fluorescent housing that features a 24-inch perforated metal basket with a white opal acrylic diffuser and a pre-painted matte white reflector. This product is designed to provide soft, balanced illumination for contemporary appearance and low glare lighting via a combination of direct and indirect light.

“The South is the largest regional market for lighting fixtures, representing 36 percent of total US demand in 2011. The region will provide strong demand for lighting fixtures through 2016 (trailing only the West), with demand expected to increase 7.9 percent annually to \$9.3 billion. The region’s construction market will benefit from the recovery of housing construction, while the vehicle and machinery market will be supported by the recovery in motor vehicle production.”
 --Section V, pg. 220

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OTHER STUDIES

World Lighting: Lamps & LEDs

World demand for lighting is projected to climb more than 12 percent annually through 2016 to \$78.3 billion. Market gains in developing countries will outpace sales in the US, Western Europe, and Japan. LED (or solid state) lighting devices will record by far the fastest global market gains. This study analyzes the \$43.9 billion global industry for lamps and LEDs used in lighting applications, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2979January 2013 \$6200

World Lighting Fixtures

Global demand for lighting fixtures will climb 6.9 percent annually through 2016 to \$153 billion. China alone will account for over one third of all new demand, retaining its position as the largest national market. Nonportable indoor lighting fixtures will record the fastest gains, fueled by a recovery in residential construction spending. This study analyzes the \$109.5 billion world lighting fixture industry, with forecasts for 2016 and 2021 by product, market, world region and for 24 major countries. The study also evaluates company market share and profiles industry competitors.

#2946September 2012..... \$6300

Smart Meters

US smart meter product and service demand is projected to increase 11.3 percent annually to \$4.4 billion in 2016. Gains will be driven by the rising penetration of smart meters, particularly advanced metering infrastructure (AMI) products. The rising share of smart meters in use will support demand for parts and services. This study analyzes the \$2.6 billion US smart meter product and service industry, with forecasts for 2016 and 2021 by product, market and US geographic region. The study also evaluates company market share and profiles industry participants.

#2844February 2012..... \$4900

World Elevators

Global elevator and escalator equipment and services demand is forecast to rise 6.4 percent yearly through 2015 to \$90 billion. China will solidify its spot as the largest elevator market and remain the top escalator market. The best prospects exist for energy-efficient elevators, in-home elevators and machine room-less (MRL) elevators. This study analyzes the \$66 billion world elevator industry, with forecasts for 2015 and 2020 by product, service, market, world region and for 16 countries. The study also evaluates company market share and profiles industry players.

#2832January 2012 \$5900

Lamps

US demand for lamps is projected to decline nearly two percent annually in unit terms through 2015, due to regulations which effectively ban incandescent lamps starting in 2012. Halogen lamps, which are the most similar to incandescent lamps in cost and light quality, will grow the fastest. However, light emitting diodes (LEDs) will pose a serious threat to lamp demand in the long term. This study analyzes the \$5.8 billion US lamp industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry players.

#2773August 2011 \$5100

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