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Table of Contents 2

List of Tables & Charts 3

Study Overview 4

Sample Text, Table & Chart 5

Sample Profile, Table & Forecast 6

Order Form & Corporate Use License 7

About Freedonia, Custom Research, Related Studies, 8

World Lighting Fixtures

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

Study #2946 | September 2012 | $6300 | 513 pages

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World Lighting Fixtures

Industry Study with Forecasts for *2016 & 2021*

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General 4
World Economic Overview 5
Recent Historical Trends 5
World Economic Outlook 7
World Demographic Overview 11
Population 12
Households 13
World Personal Consumption Expenditures 15
World Construction Expenditures 18
Residential Building 22
Nonresidential Building 25
Nonbuilding 27
World Manufacturing Outlook 29
World Motor Vehicle Trends 31
Motor Vehicle Production 32
Motor Vehicles in Use 36
Access to Electricity 38
Technology Trends 42
Pricing Patterns 45
Environmental & Regulatory Issues 46
General Regulations & Standards 46
Environmental Issues 48

WORLD SUPPLY & DEMAND

General 52
Regional Overview 53
Demand 53
Production 57
International Trade 60
Demand by Product 62
Nonportable 64
Indoor 65
Outdoor 68
Vehicular 71
Portable 74
Parts & Accessories 77
Demand by Market 78
Construction 80
Residential Building 83
Nonresidential Building 84
Nonbuilding 85
Vehicles & Machinery 86
Consumer & Commercial 87

NORTH AMERICA

General 90
Lighting Fixture Supply & Demand 91
Lighting Fixture Demand by Type & Market 94
United States 96
Canada 106
Mexico 113

WESTERN EUROPE

General 121
Lighting Fixture Supply & Demand 122
Lighting Fixture Demand by Type & Market 126
France 128
Germany 135
Italy 142
Spain 149
United Kingdom 154
Other Western Europe 160
Belgium 167
Netherlands 168
All Other 168

ASIA/PACIFIC

General 170
Lighting Fixture Supply & Demand 171
Lighting Fixture Demand by Type & Market 175
Australia 176
China 182
India 191
Indonesia 199
Japan 206
South Korea 212
Other Asia/Pacific 219
Taiwan 227
Thailand 228
All Other 228

OTHER REGIONS

Central & South America 229
Argentina 234
Brazil 240
Other Central & South America 246
Eastern Europe 252
Poland 259
Russia 264
Other Eastern Europe 271
Africa/Mideast 277
Iran 284
Turkey 289
Other Africa/Mideast 295

INDUSTRY STRUCTURE

General 302
Industry Composition 303
Market Share 306
Competitive Strategies 311
Product Development & Manufacturing 314
Marketing 315
Distribution 317
Mergers & Acquisitions 322
Cooperative Agreements 327

COMPANY PROFILES

AB Fagerhult 335
Acuity Brands 338
Bayraktarlar Holding 345
Beghelli SpA 348
Cooper Industries 351
Depo Auto Parts Industrial 356
EGLO Leuchten 358
ENDO Lighting 360
ERCO GmbH 363
Fiat SpA 365
General Electric 368
Glamox ASA 372
Havells India 375
HELLA KGaA Hueck 378
Hubbell Incorporated 382
Ichikoh Industries 389
Iwasaki Electric 391
Koito Group 394
Lights of America 399
LSI Industries 400
Mag Instrument 404
Maxim Lighting 405
Odelic Company 407
Opple Lighting 408
Oy Lival 409
Panasonic Corporation 411
Royal Philips Electronics 416
Schneider Electric 430
Schréder Group 432
Siemens AG 436
Stanley Electric 442
Toshiba Corporation 445
TRILUX GmbH 447
TYC Brother Industrial 449
Valeo SA 452
Valmont Industries 455
Varroc Group 458
Visteon Corporation 460
Zumtobel AG 462
Other Companies Mentioned in Study 469

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region 11
2 World Population by Region 13
3 World Households by Region 15
4 World Personal Consumption Expenditures by Region 17
5 World Construction Expenditures by Type & Region 22
6 World Residential Building Construction Expenditures by Region 25
7 World Nonresidential Building Construction Expenditures by Region 27
8 World Nonbuilding Construction Expenditures by Region 29
9 World Manufacturing Value Added by Region 31
10 World Motor Vehicle Production by Type & Region 36

(continued on following page)

World Lighting Fixtures

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

List of Tables/Charts

(continued from previous page)

11 World Motor Vehicles in Use by Type & Region 38
Cht Percent of Population with Electrical Power in Their Home, 2011 41

WORLD SUPPLY & DEMAND

1 World Lighting Fixture Demand by Region 55
Cht World Lighting Fixture Demand by Region, 2011 56
Cht Increase in Annual Lighting Fixture Demand from 2011 to 2016 by Region 57
2 World Lighting Fixture Shipments by Region 59
Cht World Lighting Fixture Shipments by Region, 2011 60
3 World Lighting Fixture Net Exports by Region 61
4 World Lighting Fixture Demand by Product 63
Cht World Lighting Fixture Demand by Product, 2011 63
5 World Nonportable Lighting Fixture Demand by Product & Region 65
6 World Indoor Lighting Fixture Demand by Region 68
7 World Outdoor Lighting Fixture Demand by Region 71
8 World Vehicular Lighting Fixture Demand by Region 74
9 World Portable Lighting Fixture Demand by Region 76
10 World Lighting Fixture Parts & Accessories Demand by Region 78
11 World Lighting Fixture Demand by Market 79
Cht World Lighting Fixture Demand by Market, 2011 80
12 World Construction Lighting Fixture Demand by Application & Region 82
13 World Vehicles & Machinery Lighting Fixture Demand by Region 87
14 World Consumer & Commercial Lighting Fixture Demand by Region 89

NORTH AMERICA

1 North America: Lighting Fixture Supply & Demand 93
Cht North America: Lighting Fixture Demand by Country, 2011 94
2 North America: Lighting Fixture Demand by Product 96
3 United States: Lighting Fixture Supply & Demand 102
4 United States: Lighting Fixture Demand by Product & Market 106
5 Canada: Lighting Fixture Supply & Demand 111
6 Canada: Lighting Fixture Demand by Product & Market 113
7 Mexico: Lighting Fixture Supply & Demand 118
8 Mexico: Lighting Fixture Demand by Product & Market 120

WESTERN EUROPE

1 Western Europe: Lighting Fixture Supply & Demand 125
Cht Western Europe: Lighting Fixture Demand by Country, 2011 126
2 Western Europe: Lighting Fixture Demand by Product & Market 128
3 France: Lighting Fixture Supply & Demand 132
4 France: Lighting Fixture Demand by Product & Market 135
5 Germany: Lighting Fixture Supply & Demand 140
6 Germany: Lighting Fixture Demand by Product & Market 142
7 Italy: Lighting Fixture Supply & Demand 146
8 Italy: Lighting Fixture Demand by Product & Market 148
9 Spain: Lighting Fixture Supply & Demand 152
10 Spain: Lighting Fixture Demand by Product & Market 154
11 United Kingdom: Lighting Fixture Supply & Demand 158
12 United Kingdom: Lighting Fixture Demand by Product & Market 160
13 Other Western Europe: Lighting Fixture Supply & Demand 164
14 Other Western Europe: Lighting Fixture Demand by Product & Market 166
15 Other Western Europe: Lighting Fixture Demand by Country 167

ASIA/PACIFIC

1 Asia/Pacific: Lighting Fixture Supply & Demand 174
Cht Asia/Pacific: Lighting Fixture Demand by Country, 2011 175
2 Asia/Pacific: Lighting Fixture Demand by Product & Market 176
3 Australia: Lighting Fixture Supply & Demand 180
4 Australia: Lighting Fixture Demand by Product & Market 182
5 China: Lighting Fixture Supply & Demand 188
6 China: Lighting Fixture Demand by Product & Market 191
7 India: Lighting Fixture Supply & Demand 197
8 India: Lighting Fixture Demand by Product & Market 199
9 Indonesia: Lighting Fixture Supply & Demand 203
10 Indonesia: Lighting Fixture Demand by Product & Market 205
11 Japan: Lighting Fixture Supply & Demand 210
12 Japan: Lighting Fixture Demand by Product & Market 212
13 South Korea: Lighting Fixture Supply & Demand 216
14 South Korea: Lighting Fixture Demand by Product & Market 219
15 Other Asia/Pacific: Lighting Fixture Supply & Demand 224
16 Other Asia/Pacific: Lighting Fixture Demand by Product & Market 226
17 Other Asia/Pacific: Lighting Fixture Demand by Country 227

OTHER REGIONS

1 Central & South America: Lighting Fixture Supply & Demand 232
Cht Central & South America: Lighting Fixture Demand by Country, 2011 233
2 Central & South America: Lighting Fixture Demand by Product & Market 234
3 Argentina: Lighting Fixture Supply & Demand 238
4 Argentina: Lighting Fixture Demand by Product & Market 240
5 Brazil: Lighting Fixture Supply & Demand 244
6 Brazil: Lighting Fixture Demand by Product & Market 246
7 Other Central & South America: Lighting Fixture Supply & Demand 250
8 Other Central & South America: Lighting Fixture Demand by Product & Market 252
9 Eastern Europe: Lighting Fixture Supply & Demand 256
Cht Eastern Europe: Lighting Fixture Demand by Country, 2011 257
10 Eastern Europe: Lighting Fixture Demand by Product & Market 258
11 Poland: Lighting Fixture Supply & Demand 262
12 Poland: Lighting Fixture Demand by Product & Market 264
13 Russia: Lighting Fixture Supply & Demand 269
14 Russia: Lighting Fixture Demand by Product & Market 271
15 Other Eastern Europe: Lighting Fixture Supply & Demand 275
16 Other Eastern Europe: Lighting Fixture Demand by Product & Market 277
17 Africa/Mideast: Lighting Fixture Supply & Demand 281
Cht Africa/Mideast: Lighting Fixture Demand by Country, 2011 282
18 Africa/Mideast: Lighting Fixture Demand by Product & Market 283
19 Iran: Lighting Fixture Supply & Demand 287
20 Iran: Lighting Fixture Demand by Product & Market 289
21 Turkey: Lighting Fixture Supply & Demand 293
22 Turkey: Lighting Fixture Demand by Product & Market 295
23 Other Africa/Mideast: Lighting Fixture Supply & Demand 299
24 Other Africa/Mideast: Lighting Fixture Demand by Product, Market, & Country 301

INDUSTRY STRUCTURE

1 World Lighting Fixture Sales for Selected Manufacturers, 2011 305
Cht World Lighting Fixture Market Share, 2011 307
2 Selected Acquisitions & Divestitures 325
3 Selected Cooperative Agreements 330

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World Lighting Fixtures

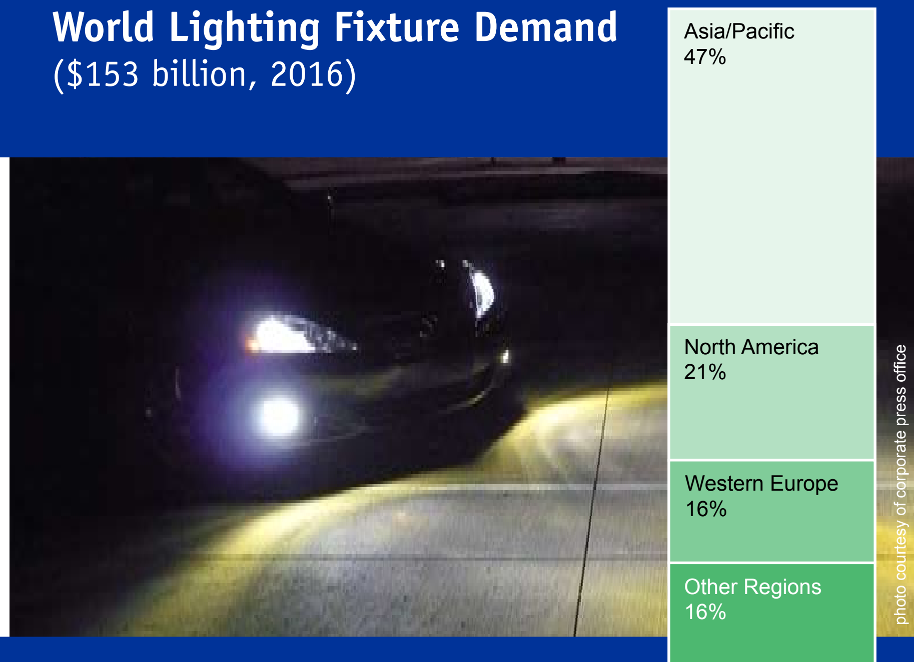
Industry Study with Forecasts for ***2016 & 2021***

Sales will be driven mainly by an acceleration in motor vehicle output and building construction activity, as well as by higher-end fixtures designed for more effiecient light sources.

World demand to rise 6.9% annually through 2016

Global demand for lighting fixtures is projected to climb 6.9 percent annually through 2016 to $153 billion. Product sales will be driven primarily by an acceleration in both motor vehicle output and building construction activity worldwide. Efforts to conserve energy and convert to more efficient light source technologies will also boost gains, particularly as sales of incandescent and other less efficient lamps are being phased out through much of the world. In many cases, the newer lighting technologies perform optimally in a new fixture designed specifically for their use, rather than in a retrofitted fixture. Increased use of these higher-end fixtures will also contribute to gains in value terms. In the developing world, ongoing efforts to modernize the building stock, coupled with increasing urbanization and rising per capita incomes, will further aid advances.

World Lighting Fixture Demand
($153 billion, 2016)



China to remain largest market, India to lead gains

Through 2016, China alone will account for 36 percent of all additional demand, retaining its position as the largest national lighting fixture market. The US, the second largest market in 2011, will also post strong gains as the country rebounds from a reduced 2011 base. Through the forecast period, the US will itself account for 18 percent of additional global sales. However, sales gains are expected to be the fastest in India, a developing market for lighting fixtures. Above average growth is also forecast in lower volume markets such as Argentina, Brazil, Indonesia, South Africa, and Vietnam.

Although increases will generally not be as robust, demand in established lighting fixture markets such as Western Europe and Japan will improve from reduced 2011 bases. The rate of growth through 2016 will be attributable in large part to a strong upturn in motor vehicle production after a period of decline. Sales of lighting fixtures in developed areas will also be spurred by improvements in economic activity, leading to a pickup in consumer spending and construction activity.

Nonportable lighting fixtures to grow the fastest

Nonportable indoor lighting fixtures will record the fastest market gains of any major product segment through 2016, fueled by a recovery in residential construction spending from a reduced 2011 base and an acceleration in nonresidential building activity. Vehicular fixtures will expand at the next fastest rate, stimulated by increases in global motor vehicle production, including a recovery in key markets such as the US, Japan, and Western Europe where vehicle output had declined sharply in 2011.

Sample Text, Table & Chart

TABLE VI-6

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

Item	2001	2006	2011	2016	2021
Asia/Pacific Lighting Fixture Demand					
% China					
China Lighting Fixture Demand					
By Product:					
Nonportable					
Indoor					
Outdoor					
Vehicular					
Portable					
Parts & Accessories					
By Market:					
Construction					
Residential Building					
Nonresidential Building					
Nonbuilding					
Vehicles & Machinery					
Consumer & Commercial					

SAMPLE TABLE

China: Lighting Fixture Demand by Type & Market

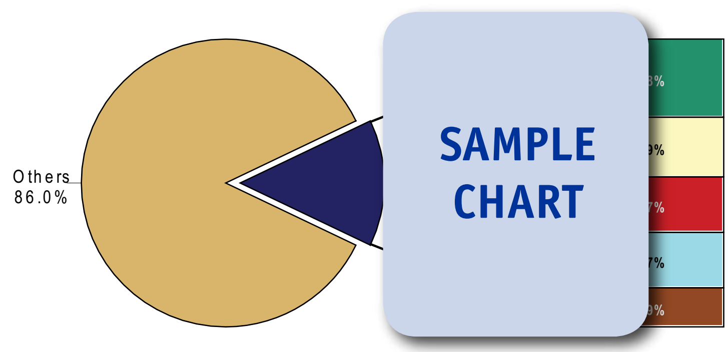
In 2011, nonportable versions accounted for the largest
lighting fixture demand by type in China, with 80 percent of
in this segment, indoor lighting fixtures dominate, with 59 pe
nonportable sales. However, the vehicular lighting segment
age annual sales gains through 201
in the vehicular lighting fixture se
d growth in local motor vehicle pr
gest motor vehicle manufacturer in
f regional motor vehicle producti
n. By 2011, the number of vehicl
times the number produced in 200
the per capita vehicle penetration rate is still well below glob
indicating high potential for growth going forward. The larg
expanding local motorcycle industry, which accounts for ove
of global production, is also key to vehicular lighting fixture

SAMPLE TEXT

Among the markets, the construction market was the largest in 2011 with two-thirds of total sales. Within this market, the nonresidential component is the largest, owing to the major advances in nonresidential construction spending, coupled with the push for greater energy efficiency which has spurred outsized lighting fixture sales. However, the residential segment is expected to post more rapid sales gains through
the forecast period, benefiting from continued growth in resi
struction spending, as well as rising personal incomes and a
modernizing homes in both urban and rural areas. Advances
fixture sales in the nonbuilding construction market will be c
the projects planned for the years between 2011 and 2016, in
extension of the highway system, railways, airports, and rela
transportation infrastructure into the rural areas. Pending pr
clude the construction of a new airport in Yantai, Shandong (
be completed in 2015), and dozens of new highways. Gover

CHART VIII-1

**WORLD LIGHTING FIXTURE MARKET SHARE
($109.5 billion, 2011)**



World Lighting Fixtures

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

Sample Profile, Table & Forecast

TABLE VI-5

**CHINA:
LIGHTING FIXTURE SUPPLY & DEMAND**

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)					
per capita GDP					
Population (million persons)					
Personal Consumption Expend (bil 201					
Construction Expenditures (bil 2010$)					
Motor Vehicle Production (000 units)					
$ lighting/000$ GDP					
$ lighting/capita					
Lighting Fixture Demand (mil $)					
net exports					
Lighting Fixture Shipments (mil $)					
% China					
A/P Lighting Fixture Shpts (mil $)					

SAMPLE TABLE

COMPANY PROFILES

TRILUX GmbH & Company KG
Heidestraße
59759 Arnsberg
Germany
49-29-32-30-1
http://www.tri

Annual Sales:
Employment:

Key Products: ...cal, and industrial applications; a

SAMPLE PROFILE

TRILUX is a producer of luminaires and other lighting products. The Company is privately held.

The Company is active in the world lighting fixtures industry via the manufacture of luminaires for interior, exterior, medical, and industrial applications. TRILUX's interior luminaires include downlight, spotlight, suspended, recessed, wall- ceiling-mounted, floor-standing, and impact-resistant types. These products can be used in educational establishments, retail stores, sports facilities, offices, airports, railway stations, and other commercial locations. Interior luminaires are sold through such product lines as ACURO, AMBIELLA, ATIRION, AURISTA, MERANO, NEXTREME, OLEVEON, PLENAR, POLARON, and STORA.

Among TRILUX's exterior luminaires are bollards, floodlights, spotlights, and post-top and in-ground lights for illuminating walkways, building facades, tunnels, streets, and highways. Exterior luminaires are sold through such product lines as BELISCO, ESTADIA, LATERNE,

447

"Demand for lighting fixtures in China is forecast to climb 11 percent annually through 2016 to $39.0 billion. Expected sales growth of $15.5 billion from 2011 to 2016 represents the greatest dollar gains of any national market. Advances will be fueled by healthy increases in construction expenditures as industrialization efforts continue. For example, the Chinese government plans to expand the size of the country's ..."
--Section VI, pg. 184

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Other Studies

Power & Hand Tools

Demand for power and hand tools in the US will rise 4.8 percent per year to $13.1 billion in 2016. Power tools will outpace hand tools, as power tools -- especially cordless electric tools -- benefit from greater capacity for innovation. Professional demand growth will outpace consumer gains due to a rebound in housing starts and increases in manufacturing output. This study analyzes the $10.4 billion US power and hand tool industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2941 .... August 2012 .... $5200

Security Products

The US market for security products and systems is expected to increase 6.3 percent annually to $19.9 billion in 2016. Electronic access control systems such as smart cards and biometrics, as well as mechanical and electromechanical locks, will post the fastest gains as new construction rebounds. The most rapid market growth will occur in the office and lodging segment. This study analyzes the $14.6 billion US security product industry, forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2917 .... August 2012 .... $5100

Lighting Fixtures

Demand for lighting fixtures in the US will increase 7.5 percent annually to $25.3 billion in 2016. Gains will be driven by an expected recovery in building construction activity and improved outlook for motor vehicle production. Demand will also benefit from the greater use of fixtures designed for energy-efficient light sources such as LEDs. This study analyzes the $17.6 billion US lighting fixture industry, with forecasts for 2016 and 2021 by type, market and geographic region. The study also evaluates company market share and profiles industry players.

#2862 .... April 2012 .... $5100

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.

#2773 .... August 2011 .... $5100

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

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