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World Lighting: Lamps & LEDs

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

Study #2979 | January 2013 | $6200 | 477 pages

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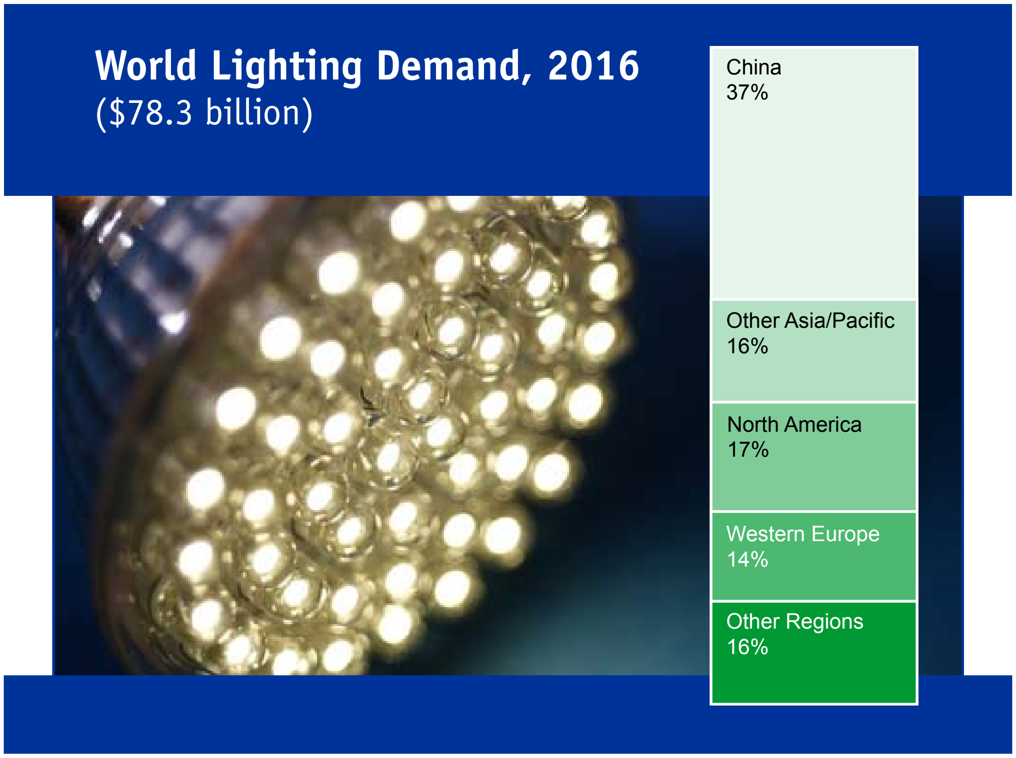
The ongoing shift to higher value, more efficient lighting technologies will be an important factor, as many countries phase out the sale of conventional incandescent lamps.



World demand to rise 12.3% annually through 2016

World demand for lighting is projected to climb more than 12 percent annually through 2016 to $78.3 billion. Sales will be driven in general by an acceleration in economic activity, personal income, global motor vehicle output, and construction spending. However, a more important factor will be the ongoing shift to higher value, more efficient lighting technologies, particularly as many countries phase out the sale of conventional incandescent lamps for general use applications.

Developing countries to be fastest growing markets

Market gains in developing countries will outpace sales in the US, Western Europe, and Japan, fueled by ongoing industrialization efforts, increased manufacturing output, and rising standards of living. China alone will account for 49 percent of all additional product demand through 2016, strengthening its position as the largest national market for lamps and LEDs. Above average growth is also expected in countries such as Russia, Mexico, and Brazil. Sales of lighting in many of these developing areas will be aided by subsidies for consumer purchases of high efficiency lighting, sometimes with support from international organizations, as utilities seek to reduce the load on local energy grids or benefit from carbon reduction credits. Poland and other parts of Eastern Europe will post similarly strong sales gains as economic conditions improve. Canada will also generate robust sales going forward as the country has been slower to require high efficiency lighting compared to other developed countries. In November 2011, the country's ban on the sale of conventional incandescent bulbs was delayed until the 2014-2016 period so the bulk of Canada's transition to higher value, high efficiency lighting will occur later than most other developed countries.

LED lighting devices to see fastest global gains

LED (or solid-state) lighting devices will record by far the fastest global market gains of any major product segment through 2016. Historically, demand for LEDs used in lighting applications has been restrained by both high product prices and technical deficiencies in the quality and diffusion of light. However, the rapid rate of technological advances has dramatically improved their performance capabilities and resulted in substantial reductions in cost. Sales of fluorescent lamps will continue to expand, spurred in the near term by government-led efforts to phase out use of energy inefficient, general service, conventional incandescent lamps in many areas. While CFLs have generally been the replacement product of choice, sales are expected to be more limited going forward partly because of growing concern for their safe disposal.

World Lighting: Lamps & LEDs

Industry Study with Forecasts for *2016 & 2021*

Sample Text, Table & Chart

TABLE VI-14

SOUTH KOREA: LIGHTING DEMAND BY PRODUCT & MARKET (million dollars)

Item	2001	2006	2011	2016	2021
Asia/Pacific Lighting Demand					
% South Korea					
South Korea Lighting Demand					
By Product:					
Lamps					
Fluorescent					
Incandescent					
High Intensity Discharge/Other					
Light-Emitting Diode					
By Market:					
Buildings					
Residential					
Nonresidential					
Outdoor					
Motor Vehicles					
Other Manufactured Goods					

SAMPLE TABLE

ASIA/PACIFIC

South Korea: Lighting Demand by Type & Market

As in most parts of the world, incandescent lamps will b
poorest performing segment. Sales will decline through 201
of intense competition from more energy efficient and longer
products. Additionally, the country plans to phase out genera
ventional incandescent lamps by the end of 2013. This ban w
eliminate incandescent lamps because versions with sufficien
levels, including most types of halogens, and conventional in
lamps in specialty shapes or sizes will still be sold in South K

Fluorescent lighting was the largest segment in 2011, ac
40 percent of total sales. Fluorescent lighting has enjoyed so
penetration in South Korea for quite some time, with sales m
supported by the widespread availability of higher efficiency
as CFLs. However, sales are expected to decelerate somewh
forecast period in light of falling prices for CFLs and increasing competition from LEDs. The South Korean government has instituted the extended producer responsibility (EPR) approach for lamps, in a system,
in the European Union in which responsibility for
is shifted away from local government waste
ducer. The national system includes a deposit
ll as regulations requiring recycling.

fastest market advances of any major product
Advances will reflect ongoing performance upgrades and increased use in the large South Korean automoti
Additionally, declining prices have made LEDs more afforda
use in a greater number of applications and markets, even as
puts a damper on value gains. Some local suppliers are alrea
some types of general use LEDs within the $15-20 price ran
considered by many to be the tipping point toward widespre
market penetration.

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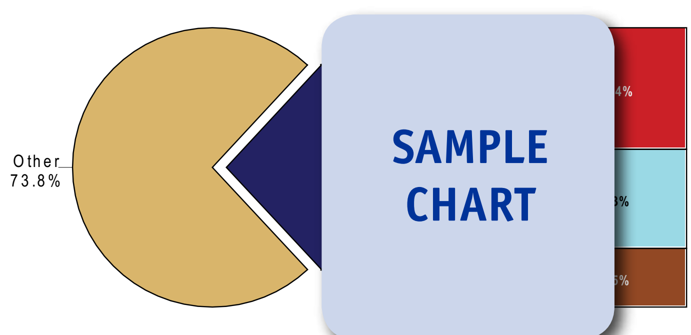
SAMPLE TEXT

CHART VIII-1

WORLD LIGHTING MARKET SHARE ($43.9 billion, 2011)



Sample Profile, Table & Forecast

TABLE VI-13

SOUTH KOREA: LIGHTING SUPPLY & DEMAND

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010$)					
per capita GDP					
Population (mil persons)					
persons/household					
Households (mil units)					
Personal Consumption Expend (bil 20					
Construction Expenditures (bil 2010$)					
Motor Vehicle Production (000 units)					
Motor Vehicles in Use (mil units)					
$ lighting/mil $ GDP					
$ lighting/capita					
Lighting Demand (mil $)					
net exports					
Lighting Shipments (mil $)					
% South Korea					
Asia/Pacific Lighting Shipments (mil $)					

SAMPLE TABLE

COMPANY PROFILES

China Electric Manufacturing Corporation
No. 9, Sectio
Taipei 100
Taiwan
886-2-2391
http://www.

Revenues:
Employmen

SAMPLE PROFILE

Key Products: standard and compact fluorescent, high inte
charge, incandescent, halogen, and light-emitting diode la

China Electric Manufacturing manufactures and markets lighting products, including lamps, light-emitting diodes (LEDs), and lighting fixtures. The Company primarily serves markets in Taiwan, Japan, and Southeast Asia.

The Company is active in the world electric lighting industry via the manufacture and marketing of standard and compact fluorescent, high intensity discharge (HID), incandescent, halogen, and LED lamps. These products can be used in residential, commercial, industrial, public amenity, automotive, and other applications for general and specialty lighting end uses. China Electric Manufacturing's standard fluorescent lamps include T5, RA85, RA69, RA74, RA85, RA95, RA99, and circular types, as well as blacklight, germicidal, insect, plant cultivation, and other specialty lamps. Compact fluorescent lamps from the Company include spiral, miniature spiral, FTL, FDX, FPX, U-shaped, TIO2, and other types that can be used to replace traditional incandescent lamps.

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"The market for electric lighting in South Korea will rise 9.5 percent annually through 2016 to $2.4 billion. Advances will be spurred by an acceleration in economic and personal consumption expenditures growth, as well as a recovery in residential building construction activity. Although sales increases will not be as strong as those for the region overall, they will exceed advances forecast for Japan, the US, and Western Europe as a whole. Gains will be aided by ..."
--Section VI, pg. 239

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Other Studies

LEDs & High Efficiency Lighting

US demand for high efficiency lighting will increase 10.4 percent annually to $11.7 billion in 2017, driven by a ban on incandescent lamps. The market for light emitting diodes (LEDs) will nearly double in size as they supplant traditional lamps in nearly every major lighting segment, especially outdoor lighting, residential and nonresidential applications. This study analyzes the $7.1 billion US high efficiency lighting industry, with forecasts for 2017 and 2022 by product, market and US region. The study also evaluates company market share and profiles industry players.

#3068 .... November 2013 .... $5300

Lamps

US demand for lamps is forecast to be restrained in unit terms, due to a ban on the manufacture and sale of most general service incandescent lamps by 2014. More expensive halogen lamps and high intensity discharge (HID) lamps will be the fastest growing products, causing total lamp demand to contract only slightly in value terms to $7.2 billion in 2017. This study analyzes the $7.4 billion US lamp industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3054 .... October 2013 .... $5300

Sensors

US sales of sensors are forecast to climb at a 6.1 percent annual rate through 2016 to $14.9 billion. Process variable sensors will remain the largest category, while chemical property sensors and proximity and positioning sensors will post the fastest growth. Motor vehicles will once again be the leading sensor market as production rebounds from recessionary lows. This study analyzes the $11.1 billion US sensors industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry competitors.

#2957 .... October 2012 .... $5100

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.

#2979 .... January 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.

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

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