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# Lamps

US Industry Study with Forecasts for **2017 & 2022**

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# Lamps

US Industry Study with Forecasts for ***2017 & 2022***



## Table of Contents


(continued on following page

# Lamps

US Industry Study with Forecasts for ***2017 & 2022***



## Table of Contents

### COMPANY PROFILES
(continued from previous page)



## List of Charts

### MARKET ENVIRONMENT



### OVERVIEW



### ELECTRICAL DISCHARGE LAMPS



### FILAMENT LAMPS



### MARKETS



### INDUSTRY STRUCTURE



## List of Tables

### EXECUTIVE SUMMARY



### MARKET ENVIRONMENT



### OVERVIEW



### ELECTRICAL DISCHARGE LAMPS



### FILAMENT LAMPS



### MARKETS



### INDUSTRY STRUCTURE

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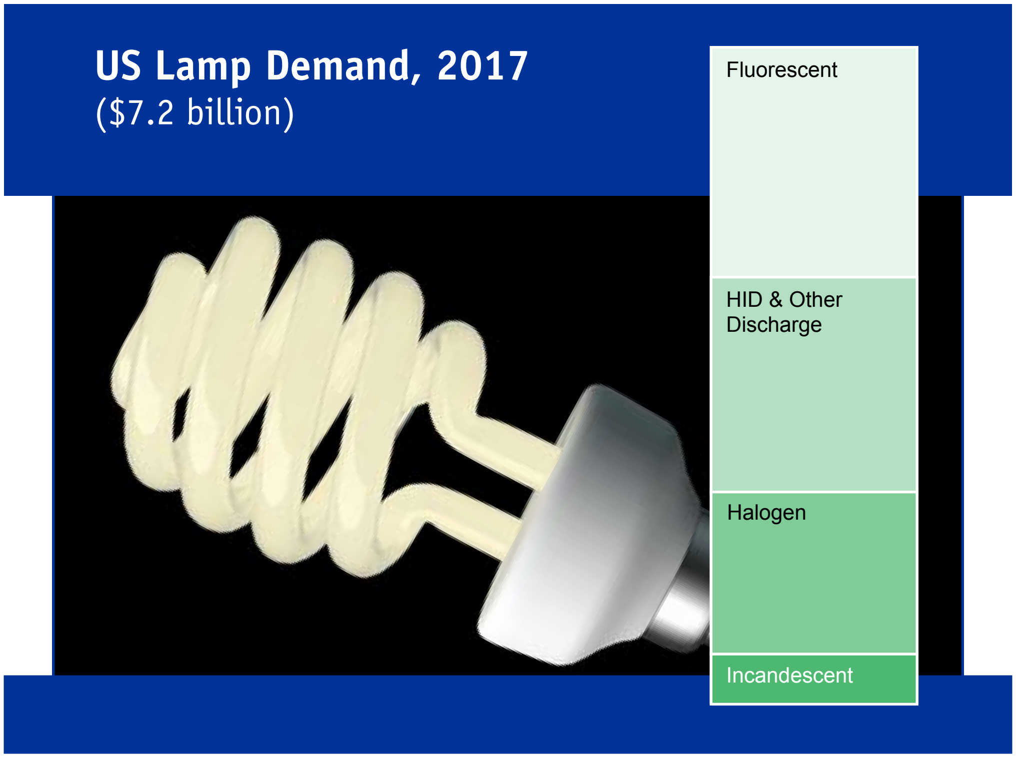
*EISA will ban the manufacture and sale of most general service incandescent lamps by 2014, initially benefiting more expensive products such as halogen lamps and CFLs.*

## US unit demand to decline 4% annually through 2017

As the US lamp market continues to adjust to the provisions of the Energy Independence and Security Act (EISA) of 2007, sales are projected to decline more than four percent annually in unit terms through 2017. EISA will effectively ban the manufacture and sale of most general service incandescent lamps by 2014, initially benefiting products such as halogen lamps and compact fluorescent lamps (CFLs), which are more efficient but also more expensive than the incandescent lamps they will replace. Because of the shift to higher value lamps, demand in value terms is expected to contract only slightly to $7.2 billion in 2017. A steeper decline is projected through 2022 primarily due to two factors: rising competition from light-emitting diodes (LEDs) and the longer useful lifespan of CFLs and halogen lamps compared to incandescent types.




## Halogen lamps to see strongest value increases

Halogen lamps are expected to see the strongest value demand increases through 2017, rising at a double-digit annual pace to $1.8 billion. These lamps will take a large share of the market from the general purpose traditional incandescent lamps because they fit in existing lighting fixtures and generate a quality of light very similar to traditional incandescent lamps at a lower initial price than any other energy efficient lighting product. The most significant impact will be in the residential market, where sales of halogen lamps are expected to triple through 2017. However, halogen lamps are less efficient and shorter-lived than LEDs and will face strong competition from these products.

The market for fluorescent lamps is expected to decline to $2.4 billion in 2017, in part reflecting the rising competition from LEDs that will impact all lamp products. Additionally, 2012 represented an elevated base for fluorescent lamps, since CFLs and efficient T8 and T5 fluorescent lamps had already begun replacing less efficient products facing regulatory phase out, including T12 fluorescent types. While products like CFLs will continue to benefit from EISA and related regulations through 2014, by 2017 many of the inefficient products will have been replaced, and the longer service lives of fluorescent lamps will restrain unit demand.

Through 2017, demand for high intensity discharge (HID) lamps is projected to increase 2.1 percent per year to $2.2 billion. However, the market for HID lamps is expected to decline between 2017 and 2022, primarily due to the rising penetration levels of LED lighting in the outdoor market, which utilizes the most expensive high wattage HID lamps and will therefore cause especially dramatic declines in value terms.

# Lamps

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## Sample Text, Table & Chart

### ELECTRICAL DISCHARGE LAMPS

**High Intensity Discharge & Other Electrical Dischar**

Demand for high intensity discharge (HID) and other el discharge lamps totaled $ up just percent of overall lamp d ccounte the HID lamp segment, d ead use lamps and to their high c for HII discharge lamps will incr $2.4 bi market will benefit from outdo market and increasing mar or vehic both of which are important for HID lamps. However, preve more rapid growth will be the expected moderation in the pri many of these electric discharge lamps and competition from ing products.

SAMPLE TEXT

Demand for HID lamps is expected to decline between 2017 and 2022. In part this reflects the fact that by 2017 the replacement of mercury vapor lamps will be essentially complete, thereby limiting opportunities to upgrade to other HID products. In addition, as the initial cost of LED lighting products for high wattage outdoor lighting declines and the longer term benefits (e.g., longer service life and lower energy costs) are proven, demand for LED lighting in outdoor market is expected to increase rapidly. This will negatively impact demand for both metal halide and sodium vapor lamps in this market. Because the outdoor market uses the most expensive high wattage lamps, the declining demand for HID lamps in this market will cause especially dramatic declines in value terms. Furthermore, the shifting mix of HID lamps so tively impact the average sales price for the overall HID lam

Imports of HID and other discharge lamps accounted fo cent of demand in 2012, up sharply from 2002 levels. Going imports of discharge lamps are expected to rise more rapidly overall market, increasing their share, but remaining below 4

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**TABLE V-13**

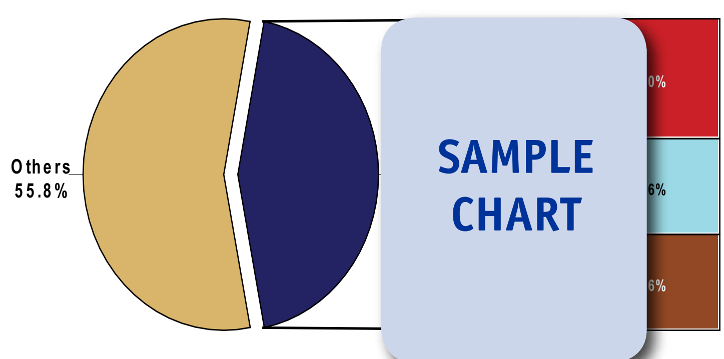
**HALOGEN LAMP SUPPLY & DEMAND**
**(millier dollars)**

| Item | 2002 | 2007 | 2012 | 2017 | 2022 |
|---|---|---|---|---|---|
| Gross Domestic Product (bil 2005$) | | | | | |
| units/mil $ GDP | | | | | |
| Halogen Lamp Demand (mil units) | | | | | |
| $/unit | | | | | |
| Halogen Lamp Demand | | | | | |
| Large Halogen Lamps | | | | | |
| Miniature Halogen Lamps | | | | | |
| - imports | | | | | |
| + exports | | | | | |
| Halogen Lamp Shipments | | | | | |
| Residential Molding & Trim Demand | | | | | |

SAMPLE TABLE

**CHART VII-1**

**US LAMP MARKET SHARE BY COMPANY**
**($7.4 billion, 2012)**



# Lamps

US Industry Study with Forecasts for ***2017 & 2022***

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## Sample Profile, Table & Forecast

**TABLE VI-3**

**RESIDENTIAL BUILDING MARKET FOR LAMPS**
**(million dollars)**

| Item | 2002 | 2007 | 2012 | 2017 | 2022 |
|---|---|---|---|---|---|
| Households (mil units) | | | | | |
| units/household | | | | | |
| Residential Lamp Demand (mil units) | | | | | |
| $/unit | | | | | |
| Residential Lamp Demand | | | | | |
| By Segment: | | | | | |
| Single-Family | | | | | |
| Multifamily | | | | | |
| Manufactured Housing | | | | | |
| By Type: | | | | | |
| Incandescent | | | | | |
| Halogen | | | | | |
| CFL | | | | | |
| Other Types | | | | | |
| % residential | | | | | |
| Building Lamp Demand | | | | | |

**SAMPLE TABLE**

### COMPANY PROFILES

**National Cathode Corporation**
210 Calming Water Trail
Dallas, GA 30132
770-529-
http://w

Annual
Employ

Key Pro

**SAMPLE PROFILE**

Nat turer of cold cathode lighting systems. The Company's products are primarily intended for commercial, residential, industrial, entertainment, gaming, assembly, and health care environments.

The Company's cold cathode lighting systems are available in such styles as NPF-6, NPF-12, and SS24 dimmable commercial use types, which are used with magnetic transformers. National Cathode makes HPB-1, HPB2, and HPB/SMART-STEP high power factor, non-dimmed models for use with magnetic ballast systems. Additionally, LST-1 and LST-2 normal power factor lamps are engineered for use with magnetic ballast systems. The Company's HPE-2012 and HPE/2027 95-watt (W) models, and HPED-10127 50-W lamps utilize electronic energy supplies. National Cathode's lamps are suitable for arch lighting, luminous ceilings and walls, skylights, pendants and custom fixtures, exposed and sculpture lighting, artwork lighting, stairs, walkways and ramps, cove lighting, glass backlighting, indoor pylons, elevator signals, custom signage, and a wide range of other uses.

National Cathode has US manufacturing operations in Seymour, Tennessee; and an assembly facility in Queens Village, New York.

 277

## STUDY COVERAGE

This Freedonia study, ***Lamps***, offers historical data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for lamp demand by type and market. The study also details key market environment factors, examines the industry structure, evaluates company market share and profiles 32 competitors in the US lamp industry.

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### 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*

### World Lighting Fixtures

Global demand for lighting fixtures is projected to increase at a 6.9 percent annual rate through 2018 to $176 billion. China will remain the largest while India grows the fastest. The dominant nonportable lighting fixture segment will experience the most rapid growth. The key construction market will grow the fastest. This study analyzes the $126 billion world lighting fixture industry, with forecasts for 2018 and 2023 by product, market, world region, and for 20 countries. The study also evaluates company market share and profiles industry competitors.

*#3192 ................ August 2014 .................. $6400*

### Lighting Fixtures

Demand for lighting fixtures in the US will rise 7.7 percent annually to $32.5 billion in 2018. The dominant construction market will be the fastest growing segment, as it rebounds from the decline of the 2008-2013 period. Nonportable fixtures will remain the dominant product category and will grow rapidly, at a slightly faster annual rate than portable lighting. This study analyzes the $22.4 billion US lighting fixture industry, with forecasts for 2018 and 2023 by product, market and US region. The study also evaluates company market share and profiles industry players.

*#3136 .................. May 2014 .................... $5300*

### 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*

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