Lamps

US Industry Study with Forecasts for 2017 & 2022

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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.
ELECTRICAL DISCHARGE LAMPS

High Intensity Discharge & Other Electrical Discharge Lamps

Demand for high intensity discharge (HID) and other electrical discharge lamps totaled $2.2 billion in 2012, up just under 30 percent of overall lamp demand. Sales accounted for 70 percent in the HID lamp segment, driven by widespread use of these lamps and to their high cost. The demand for HID discharge lamps will increase 2.0 percent annually to $2.4 billion through 2017. The outdoor market will benefit from the relatively solid growth in the outdoor lighting market and increasing market penetration in the motor vehicle market, both of which are important for HID lamps. However, preventing even more rapid growth will be the expected moderation in the prices for many of these electric discharge lamps and competition from LED lighting products.

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 sold will negatively impact the average sales price for the overall HID lamp segment.

Imports of HID and other discharge lamps accounted for 25 percent of demand in 2012, up sharply from 2002 levels. Going forward, imports of discharge lamps are expected to rise more rapidly than the overall market, increasing their share, but remaining below 40 percent.

<table>
<thead>
<tr>
<th>Item</th>
<th>2002</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2022</th>
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<tr>
<td>Gross Domestic Product (bil 2005$) units/mil $ GDP</td>
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<td>Residential Molding &amp; Trim Demand</td>
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Sample Profile, Table & Forecast

COMPANY PROFILES

National Cathode Corporation
210 Calming Water Trail
Dallas, GA 30132
770-529-4690
http://www.nationalcathode.com

Annual Sales: $15 million (estimated)
Employment: 50 (estimated)
Key Products: cold cathode lighting systems

National Cathode is a privately held manufacturer 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.

TABLE VI-3
RESIDENTIAL BUILDING MARKET FOR LAMPS
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2002</th>
<th>2007</th>
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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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