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# World Lighting Fixtures

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Industry Study with Forecasts for **2018 & 2023**

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Study #3192 | August 2014 | \$6400 | 515 pages

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*Growth will be bolstered primarily by industrialization efforts in developing nations, rebounding economies in the developed world, and the adoption of higher value lighting fixtures.*

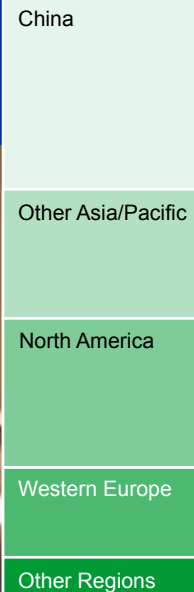
## World demand to rise 6.9% annually through 2018

Global demand for lighting fixtures is projected to increase at a 6.9 percent annual rate through 2018 to \$175.5 billion, bolstered primarily by industrialization efforts in developing nations. Countries that maintain rapidly growing construction and motor vehicle industries, such as India and China, will experience the fastest gains in lighting fixture demand. In addition, rebounding economies in much of the developed world will facilitate rising lighting fixture sales, as will the continued adoption of higher value lighting fixtures that are optimized for use with more efficient light sources, such as light-emitting diodes (LEDs).

## India, China to be fastest growing markets

China is the largest national market for lighting fixtures, accounting for 24 percent of global sales in 2013. It is also one of the fastest growing, with annual gains of nearly 10 percent expected through 2018. The country will continue to experience robust growth because of its rapidly expanding construction industry and its status as the world's largest motor vehicle producer. However, demand in India will increase at the fastest rate, driven by the continuing expansion of its electric grid and modernization of its building stock, as well as by growth in domestic vehicle production.

## World Lighting Fixture Demand (\$175.5 billion, 2018)



The US, which was the second largest national market in 2013 with 18 percent of global sales, is also projected to achieve above average gains through 2018, even as the rest of the developed world posts more moderate growth. Advances in the US lighting fixture market will be largely the result of an ongoing economic rebound. Sales increases in much of Western Europe, Japan, and Australia will be slower, hampered by a long-running shift in vehicle production capacity away from these areas, as well as by a less robust recovery from a weakened economic climate. Still, lighting fixture sales in these areas will benefit from growth in consumer spending levels and construction activity through the forecast period.

## Nonportable fixtures to be fastest growing products

Nonportable lighting fixture products account for most demand and will also experience the fastest growth. Indoor and outdoor nonportable lighting fixtures will record similar rates of growth, benefiting from strong gains in construction spending. Sales will also benefit from the replacement or retrofitting of most existing nonportable fixtures to accommodate LEDs and other advanced light sources. Advances for portable lighting fixtures will be more modest, partly because many of the newer light technologies are designed to fit most legacy portable fixtures so an upgrade is not needed to boost energy efficiency.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Lighting Fixture Demand by Type & Market

Nonportable applications comprised the bulk of lighting product demand in 2013, with portable lighting fixtures accounting for 68 percent of total sales. Among the most popular products, indoor lighting fixtures, including vehicular lighting fixtures, were the most popular, with an average yearly gain of 1.5 percent. This growth is attributed to ongoing increases in construction spending. China was the largest motor vehicle market in the world, commanding nearly one-half of global output. However, the per capita vehicle penetration in China is still well below global norms, indicating high potential for growth in both vehicles and related light fixtures going forward. The large and still expanding local motorcycle industry, which accounts for the majority of global motorcycle production, is also key to lighting fixture gains. However, in the aggregate sales gains, portable lighting fixtures will slow considerably compared to the nonportable lighting fixtures as construction spending is projected to post half the annual gains through 2018 that it had achieved from 2003 to 2013. Advances for portable and the parts and accessories product segments will continue to grow through the forecast period.

Among the markets for lighting fixtures in China, the construction market was the largest in 2013, with 68 percent of total sales. Specifically, nonresidential building settings account for the biggest share of sales, due in part to higher spending levels on lighting fixtures compared to residential building and nonbuilding sectors. In addition, nonbuilding settings typically utilize a greater number of energy-efficient, high-value lighting fixtures. However, nonbuilding construction settings for lighting fixtures will offer the best opportunities for lighting fixtures going forward. Continued investment in infrastructure projects in China, such as extensions of the highway system, railways, ports, will boost lighting fixture demand. Advances for lighting fixtures will continue to grow through the forecast period.

180

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SAMPLE  
TEXT

TABLE III-13

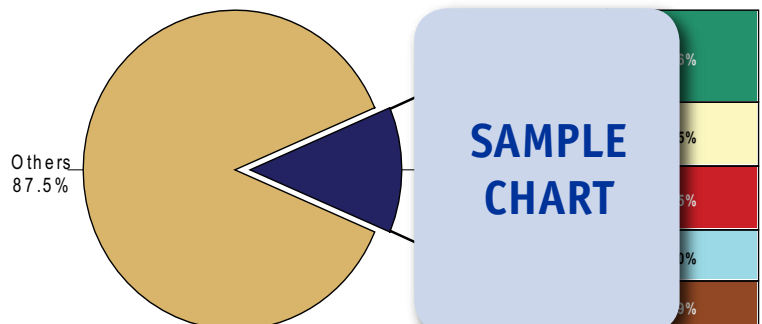
### WORLD VEHICLES & MACHINERY LIGHTING FIXTURE DEMAND BY REGION (million dollars)

Item	2003	2008	2013	2018	2023
Motor Vehicle Production (000 units)	61	67	71	75	79
Mftg Value Added (bil 2012\$)	1.2	1.4	1.5	1.6	1.7
\$ lighting/unit					
\$ lighting/000\$ MVA					
World Vehicles/Machinery Demand					
North America:					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific:					
China					
Japan					
Other Asia/Pacific					
Central & South America					
Eastern Europe					
Africa/Mideast					
% vehicles & machinery					
World Lighting Fixture Demand	6.0	6.5	7.0	7.5	8.0

SAMPLE  
TABLE

CHART VIII-1

### WORLD LIGHTING FIXTURE MARKET SHARE, 2013 (\$125.5 billion)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Fagerhult AB

566 80 Habo  
 Sweden  
 46-36-1  
 http://w

Sales: \$  
 Geograph  
 the Unit  
 pean Co  
 Employ

**SAMPLE  
PROFILE**

Key Products: spotlight, downlight, recessed, suspended, pendant, surface mounted, emergency, industrial, accent, and other indoor and outdoor luminaires

Fagerhult develops, manufactures, and markets professional lighting fixtures and related products for use in such public settings as offices, retail stores, hotels, schools, and industrial facilities. The Company operates in three segments: Indoor Lighting, Retail Lighting, and Outdoor Lighting.

The Company is active in the world lighting fixtures industry through all three segments. Via these segments, Fagerhult manufactures and markets a variety of indoor and outdoor lighting fixtures, including spotlight, downlight, recessed, suspended, pendant, surface mounted, emergency, industrial, and accent styles. These lighting fixtures are sold through such product lines as FAGERHULT, ATELJÉ LYKTAN, WHITECROFT LIGHTING, EAGLE LIGHTING, DESIGNPLAN, LTS LICHT & LEUCHTEN, and WACO. Manufacturing and distribution operations are conducted by the Company in Europe, the Africa/Mideast region, and the Asia/Pacific region.

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TABLE VI-6

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

Item	2003	2008	2013	2018	2023
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**

### STUDY COVERAGE

This Freedonia study, *World Lighting Fixtures*, offers historical data (2003, 2008, 2013) as well as forecasts (2018, 2023) for supply and demand, as well as demand by product type and market in 6 regions and 20 major countries. This study also details key market environment factors, evaluates company market share and profiles 40 competitors in the world lighting fixtures industry.

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**OTHER STUDIES**

**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 Major Household Appliances**

World major household appliance demand will rise 3.8 percent annually through 2017 to 430 million units. Cooking appliances will lead gains, as they are among the first major appliances purchased in developing countries. Rebounding housing activity and the release of pent up demand will support growth in advanced nations. This study analyzes the 358 million unit world major appliance industry, with forecasts for 2017 and 2022 by product, world region, and for 25 countries. The study also evaluates company market share and profiles industry players.  
 #3098.....January 2014..... \$6400

**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. 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

**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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