Lamps

US Industry Study with Forecasts for **2011 & 2016**

Study #2265 | November 2007 | $4500 | 372 pages

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Lamps

US Industry Study with Forecasts for ***2011 & 2016***

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Growth in US lamp demand will be driven in part by a shift away from inexpensive incandescent lamps toward more expensive, energy-efficient lamps such as compact fluorescents (CFLs).

US demand to grow 5% annually through 2011

US demand for lamps is projected to advance 5.0 percent per year through 2011 to $6.8 billion. Growth will be driven by a shift in product mix away from inexpensive incandescent lamps toward more expensive, energy-efficient lamps such as compact fluorescents (CFLs). Strong nonresidential building construction activity through 2011 will bolster demand for lamps. Advances will also benefit from a modest recovery in motor vehicle production and greater lamp use per vehicle, which includes the use of higher-priced high intensity discharge lamps and halogens instead of conventional incandescent lamps.

However, the switch to longer-lived lamps such as CFLs will dampen replacement demand in the longer term. In addition, unit price increases for lamps will be constrained by import competition, particularly in the incandescent, fluorescent and halogen segments. For some specialized, advanced lamp applications, competition from alternative lighting products, such as light emitting diodes (LEDs) and fiber optics, will also limit price growth.

Incandescents to remain key component of demand

Despite the negative outlook for incandescent lamps, these products will remain a key component of lamp demand for the foreseeable future. The large size of this segment derives from their widespread use in residential applications, which is in turn attributable to their low prices and good light quality. While the incandescent segment will no longer be the largest in the lamp market by 2011 in terms of value, these lamps will still account for the largest share in unit terms. Many existing lighting fixtures cannot accommodate CFLs, and many consumers still prefer incandescents. To address the challenge from CFLs, manufacturers of incandescent lamps are developing new types that are more energy efficient. These products, which are expected to be available by 2010, will appeal to consumers' familiarity with traditional incandescent lamps, but will be more expensive.

US Lamp Demand, 2006
($5.4 billion)

Fluorescents to overtake incandescents in value

Among the major product types, fluorescent lamps will enjoy the largest gains in lamp demand through 2011, overtaking incandescent lamps in terms of value. Most of this growth will be fueled by CFLs, which are being tapped as an alternative to the less energy-efficient incandescents in the large residential market. Furthermore, federal restrictions on the use of certain types of incandescents have been proposed. Current proposals prefer CFLs, but will allow any lamp that is similar in efficiency to be used. As a result, CFLs will face competition from LEDs, as well as next-generation incandescents and halogens.

Sample Text, Table & Chart

TABLE V-9

GENERAL HIGH INTENSITY DISCHARGE LAMP DEMAND BY TYPE
(million dollars)

SAMPLE TABLE

Item	1996	2001	2006	2011	2016
Nonbuilding Construction (bil 2000$)					0
units/000$ construction					4
General HID Lamp Demand (mil units)					8
$/unit					3
General HID Lamp Demand					0
Metal Halide					0
Sodium Vapor					0
Mercury Vapor					0
% general					1
HID & Other Lamp Demand					10

MARKETS

Decorative Holiday Lighting

SAMPLE TEXT

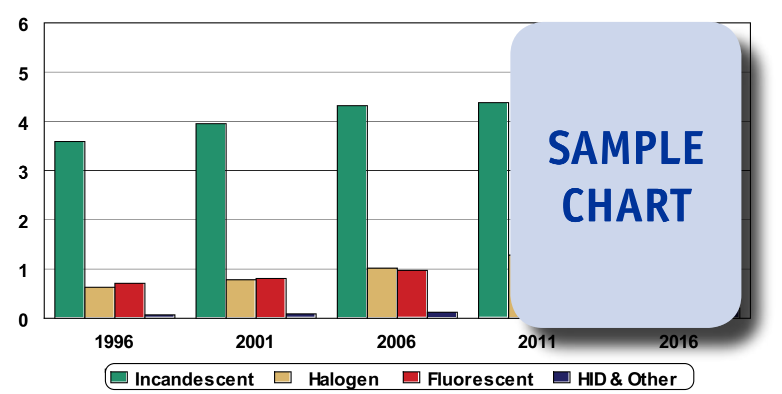
Decorative holiday lighting products are dominated by C lights, although the product segment also includes specialty l for Halloween and other decorative lighting applications. De for these l percent per year thr 2011 to $ ided by product inn particular , as well as the prod pre-lit per se a high density of foot. Val will be restrained by price pres are imported from lo production , decorative holiday face increasing competition from LED and fiber optic holiday lighting products. In particular, as the price of LED string sets continues to fall, competition will significantly increase.

The vast majority of decorative holiday lights are incandescent lamps, which benefit from their low initial cost and ability to be produced in very small sizes. Decorative holiday lights include both separately sold lights and string sets, which generally consist of 100 individual lights assembled on a string, but are available in a wide range of assemblies (from twelve to 500).

In addition to trends in the types of incandescent holiday lights used, the holiday lighting market is significantly impacted by competition from LEDs. Although the incandescent lamps used in holiday lights have advantages in terms of size and cost, the bulbs are also with high burnout and defect rates and produce heat that can ous. LED technology can be used for Christmas and other h and offers such advantages as long life, bright light and low

CHART III-2

LAMP UNIT DEMAND BY TYPE, 1996-2016
(million units)



Lamps

US Industry Study with Forecasts for ***2011 & 2016***

Sample Profile, Table & Chart

TABLE IV-1

FILAMENT LAMP SUPPLY & DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil 2000$)	82[illegible]	[illegible]	[illegible]	[illegible]	[illegible]00
filament units/000$ GDP	([illegible]	[illegible]	[illegible]	[illegible]	[illegible]40
Filament Lamp Demand (mil units)*	4[illegible]	[illegible]	[illegible]	[illegible]	[illegible]25
$/unit*	([illegible]	[illegible]	[illegible]	[illegible]	[illegible]48
Filament Lamp Demand*	1[illegible]	[illegible]	[illegible]	[illegible]	[illegible]55
Filament Lamp Demand	2[illegible]	[illegible]	[illegible]	[illegible]	[illegible]65
Incandescents	1[illegible]	[illegible]	[illegible]	[illegible]	[illegible]35
Halogens	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]30
- net imports	648	719	809	950	1110
Filament Lamp Shipments	1540	1762	2080	2180	2255

* does not include decorative holiday lamps

SAMPLE TABLE

COMPANY PROFILES

Advanced Lighting Technologies Incorporated
32000 Aurora Road
Solon, OH 44139
440-519-0[illegible]
http://ww[illegible]

Sales: $[illegible] EC)
US Sales [illegible] SEC)
Employ[illegible] SEC)

Key Pro[illegible]

SAMPLE PROFILE

Adva[illegible] ly integrated designer, manufacturer and marketer of metal halide products, including lamps, lighting system components and complete metal halide lighting systems. The privately held company also produces thin-film deposition equipment for the lighting, telecommunications, ophthalmic and optic industries.

The Company produces lamps through its Venture Lighting International subsidiary (Solon, Ohio). Venture Lighting manufactures metal halide lamps and other products used in commercial and industrial applications. Revenues from metal halide materials, systems and components accounted for about 82 percent of Advanced Lighting's FY 2006 sales, or approximately $135 million. Metal halide lighting can be used in flood, architectural, hazardous location, sports arena, airport, retail store, landscape, tunnel, security and site lighting, among other applications.

Venture Lighting's metal halide products include UNI-FORM pulse-start specialty and standard metal halide lamps. UNI-FORM pulse-start lamps consist of metal halide lamps designed to have 100

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"... halogen lamps have taken share from incandescents, rising from 20 percent of the filament segment in 1996 to 27 percent in 2006. Through 2011, this trend is expected to continue as halogens increase their share of the filament lamp market to 30 percent. Halogen lamps are forecast to significantly outpace incandescents through 2011, posting gains of 4.1 percent per year to $945 million."

--Section IV, pg. 98

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Other Studies

Circuit Breakers & Fuses

US circuit breaker and fuse demand will grow 3.7% per year through 2011, supported by stronger outlooks for construction of nonresidential buildings and electric utilities. Circuit breakers will outpace fuses, led by strong growth in power circuit breakers. High-power fuses will pace the fuse segment. This study analyzes the $3 billion US circuit breaker and fuse industry, with forecasts for 2011 and 2016 by product and market. It also evaluates company market share and profiles leading industry competitors.

#2252 .... 10/2007..................... $4400

Advanced Lighting

US demand for advanced lighting will grow nearly 14% annually through 2011. Gains will be driven by energy efficient compact fluorescent lamps (CFLs), improved light emitting diode (LED) technology, and popular high intensity discharge headlamps for motor vehicles. Building applications will be the fastest growing market. This study analyzes the $2.3 billion US advanced lighting industry, with forecasts for 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

#2197 .... 06/2007..................... $4400

Industrial Crystals

US industrial crystal demand will grow 5.8% yearly through 2011, led by uses in nonlinear optical materials and compound semiconductor substrates. Communications and security/defense will see the largest market gains. Transition metal-based crystals and semiconducting types will be the fastest growing materials. This study analyzes the $845 million US industrial crystal industry, with forecasts for 2011 and 2016 by material, application and market. It also evaluates market share and profiles leading players.

#2166 .... 05/2007..................... $4500

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will reach $7.6 billion in 2011 based on substantial growth in nonresidential construction and floor space. Manual cleaning products like wipes and automated floor cleaning equipment such as backpack vacuums will lead gains. Industrial buildings will outpace all other markets. This study analyzes the $6.5 billion US janitorial equipment and supplies industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2181 .... 03/2007..................... $4400

World Lighting Fixtures

Global lighting fixture demand will grow 5.1% yearly through 2010 based in part on a shift toward higher-end types (e.g., electronic ballasts, HID lighting, LEDs, fiber optics). Fastest gains will occur in developing areas, particularly China and India. Remodeling and retrofit activities will drive growth in developed markets. This study analyzes the $71.5 billion world lighting fixture industry to 2010 and 2015 by product, market, world region and 22 countries. It also details market share and profiles major players.

#2145 .... 12/2006..................... $5400

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