

General Lighting: Global Markets to 2022

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Abstracts

REPORT SCOPE

This report represents an in-depth analysis of the global general lighting market by luminaire types, control components, fixtures, end-use industry, and region. The report discusses the different segments of general lighting technology to derive specific market estimation. The report discusses a comparative study of how the technology has improved the lifestyle of the people and has saved energy as well. The report also discusses strategies adopted by major players in the global general lighting market. Patent analysis imparted in the report provides a snapshot of technological trends in the global market over time as well as geographically. Estimated values used are based on manufacturers' total revenues. Projected and forecasted revenue values are in constant U.S. dollars, unadjusted for inflation.

REPORT INCLUDES

59 data tables and 61 additional tables

Detailed overview and an in-depth analysis of the global general lighting market within the industry

Analyses of global market trends with data from 2016 and 2017, and projections of compound annual growth rates (CAGRs) through 2022

Segmentation of the global general lighting market by luminaire types, control components, fixtures, end-use industry, and region

Key market dynamics, trends, opportunities, and factors influencing the global general lighting market and its subsegments

A look at how a slowdown in residential construction has become a significant barrier for general lighting manufacturers

Specific strategies to help provide market penetration based on the opportunities available

A relevant patent analysis imparting a snapshot of technological trends in the global market over time as well as geographically

Identification of the major stakeholders and analyses of the competitive landscape on the basis of recent developments

Comprehensive company profiles of leading players in the market, including Citizen Electronics Co. Ltd., General Electric, Havells India Ltd., Philips Lighting Holding B.V., and Panasonic Corp.

SUMMARY

General lighting refers to main lighting in the room or a venue that replaces daylight through lighting control, and hence consumes a lot of electrical energy for its functioning. Thus, energy-saving and ecofriendly lighting technologies are being created to combat exhaustible feedstock used to generate energy. Innovative technologies such as LEDs has transformed the general lighting market to a new level. The major driver for this market is reduced energy consumption, technological advancements and increasing demand in various end-user markets. Already a well-established and vast market globally, the general lighting market is set to generate significant revenues with the growing energy-efficiency movement and an increasing global population.

Government regulations in relation to lighting products is a key factor influencing the general lighting market. Governments across the globe are aimed at phasing out the use of energy inefficient lights such as incandescent and halogen lamps with their regulations and are focusing at enhancing energyefficiency needs and incentives to building infrastructure. Apart from this, the crucial drivers for this market are increasing LED penetration, increasing LED adoption by high energy-utilization end markets (for instance, architectural, industrial, outdoor, office), swifter LED price erosion and reduced payback period, growing initiatives on improving road and street lighting, and increasing application areas and investments. The market is witnessing intense

competition among players who are looking for technological innovations, alliances, and mergers and acquisitions as strategies to expand and retain their market share. The general lighting market revenue was REDACTED in 2016 and is expected to reach nearly REDACTED in 2022, growing at a CAGR of REDACTED during the forecast period.

The various end-use industry application areas of general lighting market include offices, residential, retail, hospitality, and outdoor and others. The residential sector is the fastest-growing segment in the general lighting end-users market, and it is estimated it will grow at a CAGR of REDACTED from 2017 through 2022. This segment was largest revenue-generating segment in 2016 and is expected to retain its position throughout the forecast period. The second largest position was occupied by the office segment in 2016, owing to the increasing rate of lighting installations to increase the ambience and comfort in office settings. The office segment generated revenue of nearly REDACTED in 2016 and is expected to generate revenue of REDACTED by 2022, growing at a CAGR of REDACTED during the analysis period.

Geographically, the market is segmented into North America, Europe, Asia-Pacific, and Rest of the World (ROW). North America had the highest revenue in the market in 2016 at REDACTED and it is expected that it will continue to dominate the revenue share with a value of nearly REDACTED in 2022. Since North America is a technologically advanced region, general lighting initially formed a strong base in the region. However, the Asia-Pacific region is expected to offer the best market potential for the growth of the general lighting market, expanding at a CAGR of REDACTED during the forecast period from 2017 through 2022. Emerging nations in this region are experiencing substantial economic growth, which is expected to drive the growth of the general lighting market during the forecast period.

Since the publication of the last version of this report, SMC097A, there has been a dramatic increase in smart lighting technology (automated controls and more efficient fixtures) worldwide. The five-year CAGR forecast for this update has declined by nearly half to CAGR of REDACTED from 2017-2022). The greatest regional decline in growth will be in North America with a mere REDACTED CAGR from 2017-2022.

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