

GCC LED Lighting Market Report by Product Type (Panel Lights, Down Lights, Street Lights, and Others), Application (Residential, Commercial, Industrial, and Others), Import and Domestic Manufacturing (Imports, Domestic Manufacturing), Public and Private Sectors (Public Sector, Private Sector), Outdoor and Indoor Application (Indoor, Outdoor), and Region 2024-2032

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Abstracts

The GCC LED lighting market size reached US\$ 876.9 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 2,174.9 Million by 2032, exhibiting a growth rate (CAGR) of 10.3% during 2024-2032. The rising demand for LED lighting solutions in the commercial and industrial sector, the implementation of favorable initiatives and regulations to promote energy conservation, and significant technological advancement in LED technology are some of the major factors propelling the market.

Light emitting diode (LED) lighting or LED lighting is an advanced and energy-efficient lighting technology. It produces light by passing an electrical current through a semiconductor material, which generates light without the wasteful heat production seen in older technologies. It offers numerous benefits, including significantly lower energy consumption, longer lifespan, and reduced maintenance costs. Additionally, LED lighting's eco-friendliness and durability align well with the rising emphasis on energy conservation and environmental responsibility. Nowadays, LED lighting is gaining immense traction in residential and commercial applications across the region.

The market is primarily driven by the growing awareness of energy efficiency and sustainability practices. In addition, several governments and consumers in the gulf cooperation council (GCC) countries are prioritizing environment-friendly solutions, thus

influencing the market growth. Moreover, rapid urbanization and infrastructural development in the GCC led to the escalating demand for light-emitting diode lighting solutions due to their versatility, durability, and ability to provide enhanced illumination for various applications, including street lighting, commercial spaces, and residential complexes, which represents another major growth-inducing factor. Besides this, supportive government initiatives and regulations, including incentives and subsidies, are encouraging the adoption of light-emitting diode lighting to minimize energy consumption and carbon emissions, thus accelerating the market growth. Along with this, the prices of LED products continue to decrease, and the cost-effectiveness and long-term savings associated with lower energy bills and reduced maintenance expenses are encouraging businesses and individuals to adopt light-emitting diode lighting solutions, thus augmenting the market growth.

GCC LED Lighting Market Trends/Drivers:

The rising demand for LED lighting in commercial and industrial sectors

The market is primarily driven by the demand for LED lighting solutions, particularly within the commercial and industrial sectors. In addition, the increasing product demand in the commercial sector, such as retail spaces, offices, and hospitality establishments is influencing the market growth. Moreover, it enhances the aesthetic appeal of the space and contributes to creating a more comfortable and engaging environment for customers and employees representing another major growth-inducing factor. Along with this, increasing usage of light-emitting diode lighting solutions in the industrial sector due to its strength and durability, makes it exceptionally well-suited for demanding industrial environments, ensuring consistent and reliable illumination even in challenging conditions, thus accelerating the sales demand. Also, the potential for substantial cost savings over the long term is a driving factor for businesses in the commercial and industrial sectors to make the transition to light-emitting diode lighting solutions. Besides this, the energy efficiency of LEDs leads to reduced electricity bills, while their extended lifespan significantly lowers maintenance and replacement costs. Furthermore, with the increasing emphasis on sustainability and efficient resource utilization, the rising demand for LED lighting solutions in the commercial and industrial sectors is enhancing operational performance and cost-effectiveness for businesses.

The implementation of several favorable initiatives

The market is driven by the implementation of several favorable initiatives and regulations aimed at promoting energy efficiency and sustainability. Additionally, governments are recognizing the essential role of light-emitting diode lighting solutions

in reducing energy consumption and mitigating environmental impact, thus influencing market growth. They have established comprehensive frameworks that incentivize and mandate the adoption of energy-efficient lighting solutions. Also, these initiatives comprise numerous measures, including financial incentives, subsidies, and regulatory mandates. Moreover, financial incentives provide businesses and consumers with tangible benefits for transitioning to LED lighting, effectively offsetting the initial investment costs while subsidies lower the barriers to entry by reducing the upfront expenditure, making light-emitting diode lighting a more financially viable choice which represents another major growth-inducing factor. Besides this, the widescale adoption of light-emitting diode lighting solutions requires specific energy efficiency standards to be met that encourage manufacturers to produce LED lighting products adhering to stringent efficiency criteria and fostering consumer confidence in the technology's capabilities, thus accelerating the sales demand.

GCC LED Lighting Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the GCC LED lighting market report, along with forecasts at the regional and country levels for 2024-2032. Our report has categorized the market based on product type, application, import and domestic manufacturing, public and private sectors, and outdoor and indoor applications.

Breakup by Product Type:

- Panel Lights
- Down Lights
- Street Lights
- Others

Panel lights represent the most popular product type

The report has provided a detailed breakup and analysis of the market based on the product type. This includes panel lights, down lights, street lights, and others. According to the report, panel lights accounted for the largest market share.

Panel lights, known for their sleek and flat design, offer a seamless integration into various settings, making them a preferred choice for commercial and residential spaces, their even and widespread illumination quality enhances visual comfort, making them suitable for office environments, educational institutions, and healthcare facilities, thus contributing to the market growth.

Moreover, the widespread adoption of panel lights is due to their appeal, and energy efficiency, while they consume substantially less energy compared to traditional lighting solutions represents another major growth-inducing factor.

Besides this, several technological advancements in LED panel lights led to improvements in color rendering, dimming capabilities, and smart controls which expanded their utility and attractiveness, enabling customized lighting experiences catering to numerous preferences and requirements, thus accelerating the sales demand.

Breakup by Application:

Residential
Commercial
Industrial
Others

Commercial sector holds the largest share of the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes residential, commercial, industrial, and others. According to the report, the commercial sector accounted for the largest market share.

The commercial application segment comprises several spaces, including offices, retail outlets, hotels, restaurants, and public facilities. They prioritize efficient illumination, aesthetic appeal, and versatility in providing focused and customizable lighting solutions catering perfectly to these requirements.

Moreover, the long operational lifespan of LED lights significantly reduces maintenance efforts and costs, which are essential for businesses aiming to optimize operational budgets, thus representing another major growth-inducing factor. Along with this, the ongoing construction and urban development projects within the region are escalating the demand for lighting solutions in commercial spaces, coupled with the need for sustainable and cost-effective lighting solutions are augmenting the market growth.

Apart from this, the growing emphasis on energy efficiency aligns seamlessly with LED technology's inherent capabilities, while governments in the GCC region are encouraging energy conservation, allowing businesses to adopt lighting solutions that

minimize power consumption, thus propelling the market growth.

Breakup by Imports and Domestic Manufacturing:

Imports

Domestic Manufacturing

A detailed breakup and analysis of the market based on imports and domestic manufacturing has also been provided in the report. This includes imports and domestic manufacturing.

The imported LED lighting products market is driven by technological expertise, cost competitiveness, and access to a numerous range of products. In addition, manufacturers are employing advanced innovations, making imported LED products attractive to consumers seeking quality and innovation, catering to numerous customer preferences and specialized applications, thus contributing to the market growth.

The domestic manufacturing market is driven by government support, localization initiatives, and the desire to boost local industries. Additionally, GCC countries are recognizing the strategic importance of fostering domestic manufacturing capabilities, leading to investments in research and development (R&D), infrastructure, and skill development, thus augmenting market growth. Along with this, the growing range of locally manufactured light-emitting diode lighting solutions catering to specific regional requirements and preferences, is propelling the market growth.

Breakup by Public and Private Sectors:

Public Sector

Private Sector

Private sector represents the most popular product type

The report has provided a detailed breakup and analysis of the market based on the public and private sectors. This includes the public sector and the private sector. According to the report, the private sector accounted for the largest market share.

Private sector enterprises comprise several industries including commercial, residential, and industrial that are recognizing the multifaceted benefits of light-emitting diode lighting. These benefits include energy efficiency, cost savings, improved lighting

quality, and reduced maintenance requirements. As a result, private sector players are embracing light-emitting diode lighting solutions as an integral part of their operational strategies, thereby driving their competitive edge.

Moreover, the public sector is displaying a notable presence with their commitment to energy efficiency and sustainable practices are driving increased efforts to integrate LED lighting solutions into public spaces, infrastructure projects, and government buildings, thus representing another major growth-inducing factor. Besides this, the private sector market is driven by the prevailing trend wherein private sector entities wield a substantial influence over the adoption and proliferation of LED lighting solutions.

Breakup by Outdoor and Indoor Application:

Indoor

Outdoor

A detailed breakup and analysis of the market based on the outdoor and indoor applications has also been provided in the report. This includes indoor and outdoor.

Indoor LED lighting applications include numerous settings, including residential, commercial, and industrial spaces. Additionally, the escalating demand product demand for indoor lighting due to its energy efficiency, versatility, and aesthetic appeal are augmenting the market growth. It offers several types of customizable options, from ambient lighting to task-specific illumination, enhancing comfort and energy savings. Besides this, in commercial spaces such as offices, retail stores, and hospitality establishments, the lighting emitting diode lighting provides an attractive blend of functional lighting and ambiance creation, thus accelerating the sales demand. Also, the industrial sector benefits from the durability and focused lighting capabilities of LEDs, optimizing productivity and workplace safety.

Moreover, the outdoor application market is driven by the rising public infrastructure projects, urbanization, initiatives, and growing demand for architectural lighting. Along with this, the benefits of LED lighting such as durability, longevity, and energy efficiency make them an ideal choice for illuminating roads, highways, public spaces, and landmarks, thus propelling the market growth. Furthermore, the light-emitting diode technology's directional lighting attributes ensure minimal light pollution and effective light distribution, aligning with the GCC region's commitment to environmental sustainability, thus creating a positive market outlook.

Breakup by Country:

Saudi Arabia

UAE

Others

Qatar

Oman

Kuwait

Bahrain

Saudi Arabia exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include Saudi Arabia, UAE, and others (Qatar, Oman, Kuwait, and Bahrain). According to the report, Saudi Arabia accounted for the largest market share.

Saudi Arabia is driven by the growing infrastructural development activities. In addition, rapid urbanization, and the increasing building and construction activities are escalating the product demand rate across the region. Also, the evolving consumer preferences and the growing awareness regarding the benefits of LED lighting solutions are influencing the market growth.

Moreover, the country's proactive initiatives in fostering sustainable development and energy efficiency are significantly driving the market due to the Saudi government's commitment to diversify its economy and reduce energy consumption leading to the widespread adoption of LED lighting solutions across numerous sectors are propelling the market growth.

Competitive Landscape:

Nowadays, key players within the market are employing a range of strategic initiatives to fortify their positions and harness the ongoing opportunities within the industry. These endeavors reflect their commitment to innovation, market expansion, and customer-centric approaches. They are investing extensively in research and development (R&D) to introduce advanced lighting solutions by focusing on enhancing energy efficiency, lifespan, and customization options, catering to evolving consumer preferences and regulatory requirements. Moreover, companies are actively expanding their footprint beyond domestic borders through international distribution networks and localized marketing efforts. Besides this, key players are collaborating with other industry leaders,

technology providers, and even governmental bodies to facilitate knowledge sharing, resource optimization, and the development of comprehensive lighting solutions. They are engaging in educational campaigns to inform consumers about the benefits of LED lighting to dispel misconceptions, highlight cost savings, and promote the positive environmental impact of LED technology.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided.

Key Questions Answered in This Report

1. What was the size of the GCC LED lighting market in 2023?
2. What is the expected growth rate of the GCC LED lighting market during 2024-2032?
3. What has been the impact of COVID-19 on the GCC LED lighting market?
4. What are the key factors driving the GCC LED lighting market?
5. What is the breakup of the GCC LED lighting market based on the product type?
6. What is the breakup of the GCC LED lighting market based on the application?
7. What are the key regions in the GCC LED lighting market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL LED LIGHTING INDUSTRY

- 5.1 Market Overview
- 5.2 Market Performance
 - 5.2.1 Volume Trends
 - 5.2.2 Value Trends
- 5.3 Market Breakup by Region
- 5.4 Market by LED Products: LED Lamps, Modules and Fixtures
 - 5.4.1 Market Trends
 - 5.4.2 Market Forecast
- 5.5 Market Breakup by Application
- 5.6 Market Forecast

6 GCC LED LIGHTING INDUSTRY

- 6.1 Market Overview

- 6.2 Market Performance
- 6.3 Impact of COVID-19
- 6.4 Comparative Analysis of CFL and LED
- 6.5 Market Breakup by Product Type
- 6.6 Market Breakup by Application
- 6.7 Market Breakup by Country
- 6.8 Market Breakup by Import and Domestic Manufacturing
- 6.9 Market Breakup by Public and Private Sectors
- 6.10 Market Breakup by Indoor and Outdoor Segment
- 6.11 Market Forecast
- 6.12 SWOT Analysis
 - 6.12.1 Overview
 - 6.12.2 Strengths
 - 6.12.3 Weaknesses
 - 6.12.4 Opportunities
 - 6.12.5 Threats
- 6.13 Value Chain Analysis
 - 6.13.1 Primary Raw Material Suppliers
 - 6.13.2 LED Chip Manufacturers
 - 6.13.3 LED Package and Module Manufacturers
 - 6.13.4 Lighting/Electronic Products Manufacturers
 - 6.13.5 Product Distributors
 - 6.13.6 End Users
- 6.14 Porter's Five Forces Analysis
 - 6.14.1 Overview
 - 6.14.2 Bargaining Power of Buyers
 - 6.14.3 Bargaining Power of Suppliers
 - 6.14.4 Degree of Competition
 - 6.14.5 Threat of New Entrants
 - 6.14.6 Threat of Substitutes
- 6.15 Key Success Factors and Risk Factors for LED Manufacturers
- 6.16 Price Analysis
 - 6.16.1 Key Price Indicators
 - 6.16.2 Price Structure

7 GCC LED LIGHTING INDUSTRY: KEY DEMAND DRIVERS

- 7.1 Government's Push for Sustainable Development in the Region
- 7.2 Upcoming Events in the GCC Region Demanding Efficient Lighting Solutions

7.3 Government's Ban on Inefficient Incandescent Bulbs

7.4 Increasing Awareness of LEDs

8 SAUDI ARABIA LED LIGHTING INDUSTRY

8.1 Market Overview

8.2 Market Performance

8.3 Market Breakup by Application

8.4 Market Breakup by Product Type

8.5 Market Forecast

9 UAE LED LIGHTING INDUSTRY

9.1 Market Overview

9.2 Market Performance

9.3 Market Breakup by Application

9.4 Market Breakup by Product Type

9.5 Market Forecast

10 OTHER MARKETS IN THE GCC REGION

10.1 Qatar LED Lighting Market

10.2 Oman LED Lighting Market

10.3 Kuwait LED Lighting Market

10.4 Bahrain LED Lighting Market

11 COMPETITIVE LANDSCAPE

11.1 Market Structure

11.2 Key Players

12 LED LIGHTS MANUFACTURING PROCESS

12.1 Panel Light

12.1.1 Product Overview

12.1.2 Manufacturing Process and Process Flow

12.1.3 Raw Material Requirements

12.1.4 Major Machinery Pictures

12.1.5 Suppliers of Raw Materials and Delivery Time

12.2 Down Light

12.2.1 Product Overview

12.2.2 Manufacturing Process and Process Flow

12.2.3 Raw Material Requirements

12.2.4 Major Machinery Pictures

12.2.5 Suppliers of Raw Materials and Delivery Time

12.3 Flood Light

12.3.1 Product Overview

12.3.2 Manufacturing Process and Process Flow

12.3.3 Raw Material Requirements

12.3.4 Major Machinery Pictures

12.3.5 Suppliers of Raw Materials and Delivery Time

12.4 Street Light

12.4.1 Product Overview

12.4.2 Manufacturing Process and Process Flow

12.4.3 Raw Material Requirements

12.4.4 Major Machinery Pictures

12.4.5 Suppliers of Raw Materials and Delivery Time

12.5 Tube Light

12.5.1 Product Overview

12.5.2 Manufacturing Process and Process Flow

12.5.3 Raw Material Requirements

12.5.4 Major Machinery Pictures

12.5.5 Suppliers of Raw Materials and Delivery Time

12.6 Bulb

12.6.1 Product Overview

12.6.2 Manufacturing Process and Process Flow

12.6.3 Raw Material Requirements

12.6.4 Major Machinery Pictures

12.6.5 Suppliers of Raw Materials and Delivery Time

13 PROJECT DETAILS, REQUIREMENTS AND COSTS INVOLVED

13.1 Land Requirements and Expenditures

13.2 Construction Requirements and Expenditures

13.3 Plant Machinery

13.4 Raw Material Requirements and Expenditures

13.5 Packaging Requirements and Expenditures

13.6 Transportation Requirements and Expenditures

- 13.7 Utility Requirements and Expenditures
- 13.8 Manpower Requirements and Expenditures
- 13.9 Other Capital Investments

14 LOANS AND FINANCIAL ASSISTANCE

15 PROJECT ECONOMICS

- 15.1 Capital Cost of the Project
- 15.2 Techno-Economic Parameters
- 15.3 Product Pricing and Margins Across Various Levels of the Supply Chain
- 15.4 Taxation and Depreciation
- 15.5 Income Projections
- 15.6 Expenditure Projections
- 15.7 Financial Analysis
- 15.8 Profit Analysis

16 KEY PLAYER PROFILES

List Of Tables

LIST OF TABLES

Table 1: Global: LED Lighting Market: Key Industry Highlights, 2023 and 2032

Table 2: GCC: LED Lighting Market: Key Industry Highlights, 2023 and 2032

Table 3: Panel Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 4: Down Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 5: Flood Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 6: Street Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 7: Tube Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 8: Bulb Light Manufacturing: Suppliers of Raw Materials and Delivery Timeline

Table 9: GCC: LED Lighting Market: Competitive Structure

Table 10: GCC: LED Lighting Market: Key Players

Table 11: LED Lights Manufacturing Plant: Costs Related to Land and Site Development (in US\$)

Table 12: LED Lights Manufacturing Plant: Costs Related to Civil Works (in US\$)

Table 13: LED Lights Manufacturing Plant: Machinery Costs (in US\$)

Table 14: LED Lights Manufacturing Plant: Costs Related to Other Capital Investments (in US\$)

Table 15: LED Lights Manufacturing Plant: Raw Material Requirements (Units/Day) and Expenditures (in US\$/Unit)

Table 16: LED Lights Manufacturing Plant: Outer Packaging Requirements and Expenditure

Table 17: LED Lights Manufacturing Plant: Inner Packaging Requirements and Expenditure

Table 18: LED Lights Manufacturing Plant: Transportation Expenditure (US\$/Unit of Light)

Table 19: LED Lights Manufacturing Plant: Costs Related to Utilities (in US\$)

Table 20: LED Lights Manufacturing Plant: Costs Related to Salaries and Wages (in US\$)

Table 21: LED Lights Manufacturing Plant: Techno-Economic Parameters

Table 22: LED Lights Manufacturing Plant: Income Projections (in US\$)

Table 23: LED Lights Manufacturing Plant: Expenditure Projections (in US\$)

Table 24: LED Lights Manufacturing Plant: Income Tax Expenditure

Table 25: LED Lights Manufacturing Plant: Depreciation Rate

Table 26: LED Lights Manufacturing Plant: Cash Flow Analysis Without Considering the Income Tax Liability

Table 27: LED Lights Manufacturing Plant: Cash Flow Analysis on Considering the

Income Tax Liability

Table 28: LED Lights Manufacturing Plant: Profit and Loss Account

List Of Figures

LIST OF FIGURES

- Figure 1: GCC: LED Lighting Market: Major Drivers and Challenges
- Figure 2: Global: LED Lighting Market: Volume Trends (in Billion Units), 2018-2023
- Figure 3: Global: LED Lighting Market: Value Trends (in Billion US\$), 2018-2023
- Figure 4: Global: LED Lighting Market: Breakup by Region (in %), 2023
- Figure 5: Global: LED Lighting Market: Breakup by Application (in %), 2023
- Figure 6: Global: LED Lamps and Modules Market: Sales Volume (in Million Units), 2018-2023
- Figure 7: Global: LED Fixtures Market: Sales Volume (in Million Units), 2018-2023
- Figure 8: Global: LED Lamps and Modules Market Forecast: Sales Volume (in Million Units), 2024-2032
- Figure 9: Global: LED Fixtures Market Forecast: Sales Volume (in Million Units), 2024-2032
- Figure 10: Global: LED Lighting Market Forecast: Volume Trends (in Billion Units), 2024-2032
- Figure 11: Global: LED Lighting Market Forecast: Value Trends (in Billion US\$), 2024-2032
- Figure 12: Global: LED Lighting Market: Key Players Market Share (in %), 2023
- Figure 13: GCC: Region: LED Lighting Market: Sales Value (in Million US\$), 2018-2023
- Figure 14: GCC: Region: LED Lighting Market: Breakup by Product Type (in %), 2023
- Figure 15: GCC: Region: LED Lighting Market: Breakup by Application (in %), 2023
- Figure 16: GCC: Region: LED Lighting Market: Breakup by Country (in %), 2023
- Figure 17: GCC: Region: LED Lighting Market: Imports Vs Domestic Manufacturing (in %), 2023
- Figure 18: GCC: Region: LED Lighting Market: Breakup by Private and Public Sector (in %), 2023
- Figure 19: GCC: Region: LED Lighting Market: Breakup by Outdoor and Indoor Applications (in %), 2023
- Figure 20: GCC: Region: LED Lighting Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 21: GCC: LED Lighting Industry: SWOT Analysis
- Figure 22: GCC: LED Lighting Industry: Value Chain Analysis
- Figure 23: GCC: LED Lighting Industry: Porter's Five Forces Analysis
- Figure 24: GCC: LED Lighting: Price Structure Analysis
- Figure 25: Saudi Arabia: LED Lighting Market: Sales Value (in Million US\$), 2018-2023
- Figure 26: Saudi Arabia: LED Lighting Market: Breakup by Application (in %), 2023

Figure 27: Saudi Arabia: LED Lighting Market: Breakup by Product Type (in %), 2023

Figure 28: Saudi Arabia: LED Lighting Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: UAE: LED Lighting Market: Sales Value (in Million US\$), 2018-2023

Figure 30: UAE: LED Lighting Market: Breakup by Application (in %), 2023

Figure 31: UAE: LED Lighting Market: Breakup by Product Type (in %), 2023

Figure 32: UAE: LED Lighting Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 33: Panel Light Manufacturing: Various Types of Operation Involved

Figure 34: Panel Light Manufacturing: Conversion Rate of Products

Figure 35: Down Light Manufacturing: Various Types of Operation Involved

Figure 36: Down Light Manufacturing: Conversion Rate of Products

Figure 37: Flood Light Manufacturing: Various Types of Operation Involved

Figure 38: Flood Light Manufacturing: Conversion Rate of Products

Figure 39: Street Light Manufacturing: Various Types of Unit Operations Involved

Figure 40: Street Light Manufacturing: Conversion Rate of Products

Figure 41: Tube Light Manufacturing: Various Types of Units Operation Involved

Figure 42: Tube Light Manufacturing: Conversion Rate of Products

Figure 43: Bulb Manufacturing: Various Types of Operation Involved

Figure 44: Bulb Manufacturing: Conversion Rate of Products

Figure 45: LED Lights Manufacturing Plant: Breakup of Capital Costs (in %)

Figure 46: LED Lights Industry: Breakup of Profit Margins at Various Level of Value Chain

Figure 47: LED Lights Manufacturing Plant: Breakup of Manufacturing Costs (in %)

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