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Markets for Smart Lighting Driver, Controller and Sensor Chips

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Abstracts

The objective of this report is to identify and quantify the opportunities for electronics in smart lighting systems over the next eight years.

It is designed to become required reading for firms in the semiconductor industry that want to better understand the opportunities in smart lighting electronics.

It is also intended to provides guidance to firms in the LED and smart lighting systems sectors who need to better understand where smart-lighting electronics trends will take their businesses.

With this in mind, the focus of the analysis in this report is on the newer kinds of smart lighting – meaning those that are specifically designed for energy efficiency, color tuning or VLC.

We do not concern ourselves with the standard lighting management systems that have been around for years.

These systems do consume chips, but almost exclusively commoditized electronics that does not represent an opportunity in any meaningful sense.

Instead, most of the focus of this report is on where we think such profits might be made.

In the immediate future, this would seem to be in the form of chips that provide better control over the energy efficiency of lighting systems.

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This is to say that one focus of the report is on the high end of the LED driver business and we are specifically concerned with how this might change in the near term to better match lighting requirements for energy efficiency and to gradually pick up on emerging needs for color tuning. The report also looks at chips that are primarily involved with communications.

These include VLC chips, of course, but also ZigBee and Wi-Fi chips. MPUs for smart lighting gateways and controllers also fit into this definition and are also covered here; smart lighting control systems will become increasingly networked. Finally, we note that the “smart lighting” definition doesn’t specify the type of bulb and might be taken to include fluorescent lighting (or even incandescent lighting).

However, we are in this report focusing entirely on the LED segment. The motivation for this – as we have noted before – is that the electronics for non-LED lighting systems is completely commoditized and the interesting sector of the smart lighting market (that is the one where there are the greatest opportunities) is associated with LED systems.

In this context we note that while CFLs are now in the ascendant they are likely to be replaced by high-performance LEDs within a relativelt short space of time. Also excluded from this report is any discussion of the evolution of LEDs themselves, except where this has some relevance to the main argument.

The reason for this is that although LEDs are certainly chips, they are associated with an entirely different group of suppliers than the electronic chips that go into smart lighting systems. In addition, although LED development will certainly involve more development work to make them more energy efficient, LEDs cannot themselves be said to be “smart” in any interesting sense. In addition to a broad coverage of technologies and functionality related to smart lighting, this report also covers the needs of all the major end-user segments of the market.

We take these to be commercial and industrial, residential, government and public buildings. We have also discussed the available markets for smart lighting in transportation and outdoor lighting. This report includes a granular eight-year forecast of smart-lighting electronics with breakouts by application and type of chip.

It also includes a full critical appraisal of all the available product and market strategies in this interesting emerging segment of the smart lighting industry. Finally, this report—and the forecasts in Chapter Three —is intended to be international in scope, although we do comment at various points in the report on which countries and regions

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are most likely to be open to the penetration of smart lighting technology.

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3.7 Key Points Made in this Chapter

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