

# LED Lighting: Market Shares, Strategies, and Forecasts, Worldwide, 2015 to 2020

<https://marketpublishers.com/r/L9EAA29E247EN.html>

Date: January 2015

Pages: 973

Price: US\$ 4,000.00 (Single User License)

ID: L9EAA29E247EN

## Abstracts

LEXINGTON, Massachusetts (January 9, 2015) – WinterGreen Research announces that it has published a new study LED Lighting: Market Shares, Strategy, and Forecasts, Worldwide, 2015 to 2020. Next generation lighting achieves a complete replacement of incandescent filament bulbs with LED lighting that is more energy efficient, lasts longer and has a significantly lower cost of operation.

Philips is to sell its lighting business. The Dutch electronics group Philips has attracted bids from several private equity groups for the majority of its lighting components business, up for sale as it focuses on higher-margin activities. Philips, the market leader has been the first casualty as the profit margin on the individual LEDs is eroded because of overproduction in China. The achievement in price declines is because of economies of scale, and general competitive pressure have drastically affected the market. Philips is set to sell its lighting business soon.

Epistar is working on 200nm technology. Philips, OSRAM, and Samsung have been actively exploring GaN on silicon technology. Market shifts provide entry points for new competitors. They create significant opportunities for participants to achieve rapid increase in market share. Shifts in market share are anticipated as vendors move up the value chain to increase returns on investment.

There is a move by vendors to provide more pieces of the LED light. In this way they seek to control their margins. Vendors primarily compete with other providers of LED lighting on the basis of product performance, as measured by efficacy, light quality, increased lumen output and reliability. Product cost combined with an acceptable level of quality is always a competitive issue.

LED vendors seek to offer LED lighting products that achieve a lower total cost of ownership and enhanced product quality. The channel looks for a broad product portfolio. Those vendors with a broad product portfolio have access to strong retail channels. Channel strategy is further impacted by OEM relationships. A differentiated product design approach, proprietary technology and deep understanding of lighting applications aids the ability to compete in LED lighting markets.

LED lighting decreases labor costs of replacing bulbs in commercial situations. The LED bulbs are implementing new semiconductor technology. The 2015 study has 973 pages, 406 tables and figures. Worldwide LED lighting markets are poised to achieve significant growth as buildings and communities lead the way in implementing the more cost efficient systems. In some cases, the utility plants are providing funding and financing so that lighting users can make the shift to LED lighting.

LED lamps lower the overall cost of lighting. LED lighting costs are less than costs with incandescent lights. LED lamps offer up to 50,000 hours of illumination with a fraction of the energy used by traditional incandescent bulbs. LED bulbs generate 90% less heat than incandescent bulbs. LED bulbs extend time between bulb replacements. The bulbs are used to achieve a near zero-maintenance lighting system.

LED lighting products are coming to market rapidly. Suppliers carry up to 150 different LED bulb and lamp styles to fit the various needs of consumers and businesses.

LED PAR lamps dominate the ENERGY STAR qualified product list, so back in 2012 IEE partnered with TopTen USA and Ecova to develop recommendations for top performing PAR38 and PAR30 LED lamps. The team developed an evaluation protocol that starts with the lamps found in ENERGY STAR's list, to which we applied product criteria screens and testing to a subset of lamps to determine the 10 top performers. Efficiency along with aesthetics, payback period, and dimming performance were key criteria to the ranking.

LED lighting products compete with traditional lighting technologies on the basis of the numerous benefits of LED lighting relative to such technology including greater energy efficiency, longer lifetime, improved durability, increased environmental friendliness, digital controllability, smaller size, directionality and lower heat output.

LED lighting products face competition in the general lighting market from both traditional lighting technologies provided by numerous vendors as well as from LED-based lighting products provided by a growing roster of industry specialized participants.

## Contents

### LED LIGHTING MARKET DRIVING FORCES

Interior and Exterior LED Lights and Controllers

Interior A LED Lamps

Interior LED PAR Lamps

Light-Emitting Diodes Transform The Business Of Illumination

LEDs Are Economical

LED Lamps Durability

LED Controllers Market Driving Forces

LED Market Shares

### 1. LIGHT EMITTING DIODE (LED) LIGHTING MARKET DYNAMICS AND MARKET DESCRIPTION

1.1 LED Market Dynamics

1.2 LEDs Replace Traditional Incandescent Light Bulb

1.3 Next Generation, High-Efficiency, Cost-Saving LED Lighting

1.3.1 LED Products

1.4 LED Quality Standards

1.3.1 LED Backlight TV/Monitor

1.3.2 Outdoor Lighting Modules

1.5 Life-Cycle Assessment of Energy and Environmental Impacts of LED

1.5.1 LED Substrates

1.6 Global Economy

1.6.1 The IT Market

1.6.2 New World Order Built On The Globally Integrated Enterprise

1.6.3 Lighting Industry Market Share Commentary on LED Technology Shifts

1.7 LED Market Assessment re: Roadblocks

### 2. LIGHT EMITTING DIODE (LED) LIGHTING MARKET SHARES AND MARKET FORECASTS

2.1 LED Lighting Market Driving Forces

2.1.1 Interior and Exterior LED Lights and Controllers

2.1.2 Interior A LED Lamps

2.1.3 Interior LED PAR Lamps

2.1.4 Light-Emitting Diodes Transform The Business Of Illumination

2.1.5 LEDs Are Economical

2.1.6 LED Lamps Durability

2.1.7 LED Controllers Market Driving Forces

## 2.2 LED Market Shares

2.2.1 Philips to Sell Lighting Business

2.2.2 Philips Lumileds

2.2.3 Philips Targets Lighting for Underdeveloped Regions

2.2.4 Philips Luxeon Rebel Power LEDs

2.2.5 Philips Automotive LEDs

2.2.6 Osram

2.2.7 Osram Sylvania

2.2.8 Leotec Electronics IL6 Series LED Traffic Signal Modules in 30% of US

## Intersections

2.2.9 China's Leading LED Light Manufacturer GYLED

2.2.10 Toshiba LED Lighting

2.2.11 Epistar

2.2.12 Cree

2.2.13 Cree Manufacturing

2.2.14 Cree A Leading Innovator Of Lighting-Class Light Emitting Diode (LED)

2.2.15 Cree Addresses Emerging Markets

2.2.16 Cree Financials

2.2.17 GE Lighting Solutions

2.2.18 GE ROI for LEDs

2.2.19 GE Installs Municipal Lighting

2.2.20 Acuity Brands Enhances Popular Lithonia Lighting TWH and TW Luminaires with LED Technology

2.2.21 QD Vision

2.2.22 Lighting Science Group

2.2.23 Lighting Science Group Revenue

2.2.24 Bridgelux LED Arrays

2.2.25 Albemarle

2.2.26 Plessey

2.2.27 General Electric

2.2.28 Phihong

2.2.29 AU Optronics/Lextar Electronics

2.2.30 Lextar Acquisitions

2.2.29 Lite-On Group/Leotec

2.2.30 Lowcled

2.2.31 Mitsubishi/Verbatim LED Developments

- 2.2.32 Nichia
- 2.2.33 Ohyama Lights
- 2.2.34 LED Lighting Company Trends
- 2.3 LED Lighting Market Forecasts
  - 2.3.1 LED Light Shipments Market Forecasts, Units
  - 2.3.2 LED Light Shipments Segments Market Forecasts
  - 2.3.4 Outdoor Municipal Street Lights and Door LED Lights
  - 2.3.5 Commerical LED Light Shipments Market Forecasts
  - 2.3.6 LED PAR Residential Light Shipments Market Forecasts
  - 2.3.7 LED Residential A and Other Lights Market Forecasts,
  - 2.3.8 LED Automotive Light Shipments Market Forecasts Units, Worldwide, 2014-2020
  - 2.3.9 LED Traffic Lights Market Forecasts, Dollars, Worldwide, 2014-2020
- 2.4 LED Bulb Prices
- 2.5 Lighting Value: Installed Base and Addressable Market
- 2.6 LED Lighting Market Channel Segment Forecasts
- 2.8 LED Light Addressable Market, Market Penetration Forecasts
  - 2.8.1 General Lighting and LED Lighting Installed Base and Market Penetration
- 2.9 Comparison of LED vs. Incandescent Overall Costs
  - 2.9.1 Relative ROI Incandescent Lights Compared to LED Lights
  - 2.9.2 Energy Star Qualified LED Lamps Increasing
  - 2.9.3 LED High Power Streetlights Save 79% and 77% of Energy, Compared With A 250w Sodium And Halogen Lights
  - 2.9.4 LED Lighting Business Models Shift
- 2.10 LED Market Description
  - 2.10.1 LED Markets, Lighting, LCD and TV Displays, Automotive, Cell Phones, Notebooks, Tablets and Displays
  - 2.10.2 LED Market Growth
  - 2.10.3 LED LCD TVs
  - 2.10.4 LED Die Surface
  - 2.10.5 LED Reflector Lamps
- 2.11 LED Energy Reduction
  - 2.11.1 LEDs in LCD Backlighting
  - 2.11.2 LED Driver ICs
  - 2.11.3 Texas Instrument LED Driver ICs and LED Lighting ICs
- 2.12 LED Lighting ICs
  - 2.12.1 LED Signage ICs
  - 2.12.2 Backlight ICs
  - 2.12.3 Camera Flash ICs
  - 2.12.4 Indicator/RGBW ICs

- 2.12.5 Automotive Lighting ICs
- 2.13 Paradigm Shift of the Lighting Industry
  - 2.13.13 Lowering Prices of LED Lighting is Key
  - 2.13.2 LED Global Market Penetration of 50% Expected by 2015
- 2.14 LED Prices
  - 2.14.1 LED Light Bulbs E26/E27 7W EcoRize
  - 2.14.2 Top Ten USA LED Lamps Ratings and Prices
- 2.15 LED Regional Market Analysis
  - 2.15.1 LED Global Lighting Trends
  - 2.15.2 US LED Lighting
  - 2.15.3 China Leverages Supply of Rare-Earth Elements
  - 2.15.4 China
  - 2.15.5 China Controls Vast Majority Of The Rare-Earth Materials
  - 2.15.6 Japan: Ohyama Lights
  - 2.15.7 Japan World Leading Country in LED Lighting
  - 2.15.8 Japan
  - 2.15.9 Cree Revenue by Regional Segment
  - 2.15.10 Latin America Governments
  - 2.15.11 Philips Targets Lighting for Underdeveloped Regions
  - 2.15.12 DMX Tecnologias SA DE CV High Power LED Streetlights in Latin America

### **3. LED LIGHTING PRODUCT DESCRIPTION**

- 3.1 GE LED Lighting Solutions
  - 3.1.1 General Electric LED Lighting
  - 3.1.2 GE RDL Range
  - 3.1.3 GE IMMERSION LED Refrigerated Display Lighting
  - 3.1.4 GE Tetra Range
  - 3.1.5 GE LED Cove Lighting
  - 3.1.6 GE's LED Cove Long Run Fixture System
  - 3.1.7 GE Infusion M4500 Series
  - 3.1.8 GE Infusion DLM Series
  - 3.1.9 GE Start GLS Bulb
  - 3.1.10 GE Infusion NPM Series
  - 3.1.11 GE Outdoor Stretch of Road Luminaires
  - 3.1.12 GE Okapi Flexible LED Outdoor Lighting Solution
  - 3.25.13 GE ERS LED
  - 3.1.14 GE LED Area Lighter
  - 3.1.15 GE Iberia LED

3.1.16 GE Duna LED for Residential Areas, Parks And Gardens, Commercial Centres, Pedestrian Walkways And Squares

3.1.17 GE ROI for LEDs

3.1.18 GE Tetra AL10

3.1.19 GE Tetra miniMAX

3.1.20 GE Lumination LED Luminaires - EP Series

### 3.2 Osram

3.2.1 Osram Natural Lighting Effects

3.2.2 Osram City Lighting

3.2.3 Osram Urban safety

3.2.4 Osram White Light In The City

3.2.5 Osram Potential Savings from LED in Street Lighting

3.2.6 Osram White Light Provides Increased Safety

3.2.7 Osram Advantages of White LED

3.2.8 Osram OLED Orbeos

3.2.9 Osram LEAF-Pendant LED

3.2.10 Osram Noxlite LED Spot

3.2.11 Osram Pursos

3.2.12 Osram Optotronic Constant Current LED Power Supplies with LEDset

3.2.12 Osram Sylvania

3.2.13 Osram Sylvania Integrated LED Lamps

3.2.13 Osram Sylvania LED Modules & Arrays

3.2.14 Osram Sylvania Optotronics

### 3.3 Samsung LED Components

3.3.1 Samsung LED High Power

3.3.2 Samsung LED Middle Power

3.3.3 Samsung Outperforms the LED Competition

3.2.4 Samsung LED Candle

3.3.3 Samsung LED Reflector

3.3.4 Samsung LED Light Bulb

### 3.4 Philips Lumileds

3.4.1 Philips LUXEON High Power LED Lighting

3.4.2 Philips Luxeon Rebel Power LEDs

3.4.3 Philips LUXEON c

3.4.4 Philips LUXEON Flash LED

3.4.5 Philips LUXEON Altilon

3.4.6 Philips Mid-Power LEDs

3.4.7 Philips Automotive LEDs

3.4.8 Philips Quality White Lighting with LEDs



- 3.4.9 Philips Lumileds High Color Rendering Index (CRI)
- 3.4.10 Philips Lumileds Phosphor Deposition Techniques
- 3.4.11 Philips Lumileds LUXEON A
- 3.4.12 Philips Lumileds SignalSure
- 3.4.13 Philips Lumileds SnapLED
- 3.4.14 Philips Lumileds Quality White Lighting with LEDs
- 3.5 Mitsubishi/Verbatim
  - 3.5.1 Verbatim
- 3.6 Toshiba
  - 3.6.1 Toshiba Lighting Technology
  - 3.6.2 Toshiba Lighting the Way
  - 3.6.3 Toshiba LED Lighting
  - 3.6.4 Toshiba 220-240V
  - 3.6.5 Toshiba G25
  - 3.6.6 Toshiba DMT6 LED Downlight
  - 3.6.7 Toshiba TLS-DCA6 & TLS-DCA8 LED Downlights
  - 3.6.8 Toshiba TLS-WP LED Wallpack Lighting
  - 3.6.9 Toshiba TLS-ATLS and TLS-ATLM LED Area Lighting
- 3.7 Adata
  - 3.7.1 Adata LED Modules
  - 3.7.2 Adata Omnidirectional LED Bulb
  - 3.7.3 Adata LED Tulip Lamp
  - 3.7.4 Adata Tunnel Light
  - 3.7.5 Adata Projection Light
  - 3.7.6 Adata Warning Light
  - 3.7.7 Adata High Bay Light
  - 3.7.8 Adata Gas Station Light
- 3.8 Bridgelux
  - 3.8.1 Bridgelux OLM Series
  - 3.8.2 Bridgelux Vero Series
  - 3.8.3 Bridgelux Vero™ Array Series
  - 3.8.4 Bridgelux V Series
  - 3.8.5 LED Retrofit Bulbs
  - 3.8.6 Bridgelux BXRA3 Series
  - 3.8.7 Bridgelux LED Chips
  - 3.8.8 Bridgelux LS Arrays
  - 3.8.9 Bridgelux ES Arrays
  - 3.8.10 Bridgelux RS Arrays
- 3.9 Cree



- 3.9.1 Cree Standard A-Type Replacement Bulb
- 3.9.2 Cree Reflector (Flood/Spot)
- 3.9.3 Cree CR80-650L Deep Recess LED Downlight
- 3.9.4 Cree CR4
- 3.9.5 Cree 304 Series Interior
- 3.10 Delta Group
  - 3.10.1 Delta Light Engines & Modules
  - 3.10.2 Delta LED Lamp and Tube EMS
  - 3.10.3 Delta Highbay
  - 3.10.4 Delta Canopy
  - 3.10.5 Delta Parking Garage
  - 3.10.6 Delta Parkway Lighting
  - 3.10.7 Delta High Lumen Street Lighting
- 3.11 Everlight
  - 3.11.1 Everlight 2835 Package (0.2W)
  - 3.11.2 Everlight 5630D Package (0.5W)
  - 3.11.3 Everlight Shwo (1W, 3W)
- 3.12 Leotek
  - 3.12.1 Leotek Municipal Transportation LED Lighting Products
  - 3.12.2 Leotek CIL and CD Series LED Pedestrian Countdown Signal Modules - 16"
  - 3.12.3 Leotek CL Series LED Traffic Cabinet Light
  - 3.12.4 Leotek LED Railroad Grade Crossing Signal
  - 3.12.5 Leotek LED Street and Area Lighting Products
  - 3.12.6 Leotek LED Building Mounted Lighting Products
- 3.13 Ledtek
  - 3.13.1 Ledtek T8 LED Tube
- 3.14 GYLED
- 3.15 Sengled
  - 3.15.1 Sengled LED Street Light
  - 3.15.2 Sengled LED Indoor Lighting
- 3.16 ENDO
  - 3.16.1 ENDO Adjustable Downlight
  - 3.16.2 ENDO Wall Washer Downlight
  - 3.16.3 ENDO Dampproof Down Light
  - 3.16.4 ENDO Spot Light
  - 3.16.5 ENDO Vivid
  - 3.16.6 ENDO Moving Gyro System
  - 3.16.7 ENDO Indirect Light
  - 3.16.8 ENDO Surface Mounted Light

- 3.16.9 ENDO High Power Light
- 3.16.10 ENDO Outdoor Bracket
- 3.17 Plessey
  - 3.17.1 Plessey's High Brightness LEDs
- 3.18 Kingsun LED Street Lights: Outdoor LED Lighting and Indoor LED Lighting in China
  - 3.18.1 Kingsun - LED Street Light
  - 3.18.2 Kingsun LED Street Light - Apollo
  - 3.18.3 Kingsun - Solar LED Street Light
  - 3.18.4 Kingsun - LED Flood Light
  - 3.18.5 Kingsun - LED Parking Light
  - 3.18.6 Kingsun - LED Canopy Light
  - 3.18.7 Kingsun - LED Tunnel Light
  - 3.18.8 Kingsun - LED Courtyard Light
- 3.19 Ohyama Lights
  - 3.19.1 Ohyama EDGE-LIT LED PANELS
  - 3.19.2 Ohyama LED 4FT Surface Mount with Motion Sensor
  - 3.19.3 Ohyama 12" LED Ceiling Light
  - 3.19.4 Ohyama LED Highbay - OLHB Series For High-Ceiling Facilities
- 3.20 Sharp LED Lighting
  - 3.20.1 Sharp Mega Zenigata
  - 3.20.2 Sharp Mini Zenigata
  - 3.20.3 Sharp Petite Zenigata
  - 3.20.4 Sharp Tiger Zenigata
  - 3.20.5 Sharp Double Dome
  - 3.20.6 Sharp SAE-Series
  - 3.20.7 Sharp LED Solutions
  - 3.20.8 Sharp LED Proven Technology
- 3.21 Soraa
  - 3.21.1 Soraa MR16 - GU5.3
  - 3.21.2 Soraa MR16-GU10
  - 3.21.3 Soraa PAR30
  - 3.21.4 Soraa PAR38
  - 3.21.5 Soraa AR111
- 3.22 SunSun Lighting
  - 3.22.1 SunSun LED Bulb
  - 3.22.2 SunSun LED Spotlight
  - 3.22.3 SunSun LED Tube
  - 3.22.4 SunSun LED Par Lamp

- 3.22.5 SunSun LED Downlight
- 3.22.6 SunSun LED Desk Lamp
- 3.23 Crep Optoelectronic
  - 3.23.1 Crep 3W G45 Led Bulb
  - 3.23.2 Crep 4W G50 Led Bulb
- 3.24 Echelon Outdoor lighting
- 3.25 Shenzhen Hoyol
  - 3.25.1 Hoyol LED Streetlights
- 3.26 Hong Sheng LED Mining Lamp
- 3.27 Jingge LED Light Curtain
  - 3.27.1 Jingge LED Light Source
  - 3.27.2 Jingge LED Light Strip
- 3.28 Kingbright
  - 3.28.1 Kingbright SMD LED
  - 3.28.2 Kingbright Top-Emitting PLCC SMD LED
  - 3.28.3 Kingbright Reverse Mount SMD LED
  - 3.28.4 Kingbright SOT-23 SMD LED
  - 3.28.5 Kingbright Subminiature SMD LED
  - 3.28.6 Kingbright Top-Emitting Chip SMD LED
  - 3.28.7 Kingbright Right Angle SMD LED
  - 3.28.8 Kingbright Multi-Color SMD LED
- 3.29 Koizumi
- 3.30 Lextar LED Lighting
  - 3.28.1 Lextar Glass LED Tube
  - 3.28.2 Lextar Plastic LED Tube
  - 3.28.3 Lextar LED Batten
- 3.31 Nichia
  - 3.30.1 Nichia UV-LED
  - 3.30.2 Nichia Standard LED
- 3.31 Shenzhen Wisdom LED
  - 3.31.1 Wisdom RL-MR16-9W-2
  - 3.31.2 Wisdom RL-MR16-5024
- 3.32 Zumbotel LED Spotlights
  - 3.32.1 Zumbotel LED Discus Evolution
  - 3.32.2 Zumbotel Vivo LED R
- 3.33 Zytech
- 3.34 Lighting Science Group
  - 3.34.1 Lighting Science Group A19/A60 Omni
  - 3.34.2 Lighting Science Group BR20

- 3.34.3 Lighting Science Group DFN19/A60
- 3.34.4 Lighting Science Group PAR16
- 3.34.5 Lighting Science Group BayLight
- 3.34.6 Lighting Science Group BayLume
- 3.34.7 Lighting Science Group LED Lamps
- 3.35 Solid State Lighting Systems
  - 3.35.1 Solid State Lighting Systems Tilelite
  - 3.35.2 Solid State Lighting Systems LED Pool Lights
  - 3.35.3 Solid State Lighting Systems Quad Tilelite
- 3.36 LED Microsensor NT
  - 3.36.1 LED Microsensor NT Light Emitting Diodes for 1600-2400 nm spectral range
  - 3.36.2 LED Microsensor NT Light Emitting Diodes for 2800-5000 nm spectral range
  - 3.36.3 LED Microsensor NT LED Chip Design
- 3.37 Acuity Brands Lighting
  - 3.37.1 Acuity Brands Indoor LED Solutions
  - 3.37.2 Acuity Brands DOM6 LED
  - 3.37.3 Acuity Brands REALITY 6" LED Module
  - 3.37.4 Acuity Brands ELM2 LED
- 3.38 Litecontrol
  - 3.38.1 Litecontrol Wall Arcos LED
  - 3.38.2 Litecontrol Aerial
- 3.39 Intematix
  - 3.39.1 Intematix ChromaLit
  - 3.39.2 Intematix LED Phosphors
- 3.40 iWatt
  - 3.40.1 iWatt iW1760
  - 3.40.2 iWatt iW3630
- 3.41 QD Vision QLEDs
  - 3.41.1 QLED Technology In Full-Color Displays And Lighting Devices
  - 3.41.2 QD Vision
  - 3.41.3 QLEDs -- The Future
  - 3.41.4 QD Vision QLED Technology
- 3.42 Prolighting TCP
  - 3.42.1 ProLighting LED Light Bulbs
- 3.43 ATG Electronics
- 3.44 Utech LED
- 3.45 Advantech Lighting Solutions/NaturaLED
- 3.46 GreeneLED
- 3.47 Light KIW

3.48 NuVue

3.49 Albemarle Light Emitting Diode (LED) and Compound Semiconductor

3.50 Larson

3.51 Nichia

3.52 Toyoda Gosei

3.53 Epistar

## **4 LED LIGHTING TECHNOLOGY**

4.1 LED Technology Analysis

4.2 LED Power Supply Architecture and Primary Side Solutions

4.2.1 Single Stage

4.2.2 Semi-Single Stage

4.2.3 Dual Stage

4.2.4 Tri Stage

4.3 AC/DC LED Lighting Product Solutions

4.3.1 Driving the LEDs

4.3.2 Linear

4.3.3 Buck

4.3.4 Flyback

4.3.5 DC/DC LED Lighting Product Solutions

4.4 A-Lamp LED Bulb Designs – Edison A15, A19, A21

4.5 LED A-Lamp Bulb Reference Designs – Edison A15, A19, A21 LED Lamps

4.6 Related LED Lighting Design Resources

4.7 R/PAR/BR LED Bulb Designs – R20, PAR20, PAR30, PAR38, BR30, BR40, etc.

4.8 LED R/PAR/BR Bulb Reference Designs – R20, PAR20, PAR30, PAR38, BR30, BR40, etc.

4.9 Related LED Lighting Design Resources

4.10 LED Downlight Designs

4.11 LED Downlight Reference Designs

Related LED Lighting Design Resources

4.12 GU10 LED Lighting Reference Designs

4.13 GU10 LED Lighting Reference Designs

4.14 T8 LED Lighting Reference Designs

4.15 T8 LED Lighting Reference Designs

4.17 MR16 LED Bulb Designs

4.17 MR16 Bulb Reference Designs

4.18 AR111 LED Lighting Reference Designs

4.19 AR111 LED Lighting Reference Designs

- 4.20 150mm GaN-on-Si templates
- 4.21 Light Emitted Or Absorbed In Discrete Packets Called "Photons"
  - 4.21.1 Lighting Brand Standards
  - 4.21.2 Light-Emitting Diodes LEDs
- 4.22 Institute of the Edison Foundation IEE Measures LED lamps
  - 4.2.2 Utility Investments In Electric Efficiency Programs
- 4.4 LEDs Devices Use Semiconductor Materials
  - 4.4.1 TriMethyl Gallium (TMG)
  - 4.4.2 Triethylgallium (TEG)
  - 4.4.3 Trimethylaluminum (TMA-PG)
  - 4.4.4. Trimethylgallium (TMG)
  - 4.4.5 LED Colors and Common Chemistries
  - 4.4.6 White LEDs
- 3.10.3 GaN-on-Si templatesfor LED Lighting
- 4.4.8 Light Emitting Diode (LED): Compound Semiconductor TriMethyl Aluminum (TMA), TriEthyl Gallium (TEG) and TriMethyl Indium (TMI)
- 4.5 Lighting Controls
- 4.5 LED Environmental Dimension
  - 4.5.1 Biologically Effective Lighting
- 4.6 Safety Dimension
  - 4.6.1 LED Manufacturing Is A Very Complex And Highly Technical Process
  - 4.6.2 Lighting Efficiency Comparison
- 4.7 LED Lighting Standards
- 4.1 'R2D2' Project Improves OLED Manufacture
  - 4.1.1 Challenges of OLED Production

## **5 LED LIGHTING COMPANY DESCRIPTION**

- 5.1 Acuity Brands Lighting
  - 5.1.1 Acuity Strategy
  - 5.1.2 Acuity Revenue
  - 5.1.3 Acuity Products
  - 5.1.4 Acuity Customers
  - 5.1.5 Acuity Brands Enhances Popular Lithonia Lighting TWH and TWP Luminaires with LED Technology
  - 5.1.6 Acuity North America Lighting Market Shares
- 5.2 Adata
  - 5.2.1 ADATA Revenue
- 5.3 Advantech Lighting Solutions/NaturaLED

## 5.4 Advanced Lighting Technologies

### 5.4.1 APL Engineered Materials

### 5.4.2 Advanced Lighting Technologies/Venture Lighting International/Sunmaster

### 5.4.3 Venture Advanced Lighting Technologies Company

### 5.4.4 Venture Lighting/Sunmaster Light & Plants

### 5.3.5 Venture Lighting/Sunmaster Hydroponic Product Support

### 5.3.6 Venture Lighting/Sunmaster PAR and Plant Response Curve

### 5.3.7 Sunmaster Comprehensive Supply of HID Lamps

### 5.3.8 Venture Lighting PAR Watts for Plants

### 5.3.9 Venture Lighting Photons

### 5.3.10 Venture Lighting

### 5.3.11 Venture Lighting Global Perspective

### 5.3.12 Venture Lighting Metal Halide Innovator

### 5.3.13 Venture Lighting International/Sunmaster

## 5.4 Aixtron

### 5.4.1 Aixtron LED Lighting

### 5.4.2 Aixtron Electronics Innovation Technologies

### 5.4.3 Aixtron Made in Germany" Technologies

### 5.4.4 Plessey Semiconductor Expands GaN-on-Silicon LED Production Using Aixtron Technology

## 5.5 Albemarle

### 5.5.1 Albemarle Catalysts

### 5.5.2 Albemarle Discussion

### 5.5.3 Albemarle Discovery in Lithium Carbonate Production

### 5.5.4. Albemarle Commercial Technology Services

### 5.5.5 Albemarle Pretreat Catalysts

### 5.5.6 Albemarle Catalysts

## 5.6 ATG Electronics

## 5.7 Avances Luminicos Plus S.A. de C.V

## 5.36 AU Optronics/Lextar Electronics

## 5.8 Black Dog LED

### 5.8.1 Black Dog LED Platinum xl vs. 1000w Hid:Total Cost Of Ownership Analysis

## 5.9 Bridgelux

### 5.9.1 Bridgelux Revenue

## 5.10 CE Lighting

## 5.11 Cree

### 5.11.1 Cree Reportable Segments

### 5.11.2 Cree Revenue

### 5.11.3 Cree LED Lighting



- 5.11.4 Cree Power and Wireless Devices
- 5.11.5 Cree Sets R&D Performance Record with 276 Lumen-Per-Watt Power LED
- 5.11.6 Cree Business
- 5.11.7 Cree LED Lighting Products
- 5.11.8 Cree LED Chips
- 5.11.9 Cree LED Components
- 5.11.10 Cree LED Research and Development
- 5.12 Crep Optoelectronics
- 5.13 Daystar
- 5.14 Delta Group
  - 5.14.1 Delta Power Supplies
  - 5.14.2 Delta World-
  - 5.14.3 Delta Group Plant Factory Control Systems
  - 5.14.4 Delta Group Data Center Power
  - 5.14.5 Delta Group Renewable Energy Solutions
  - 5.14.6 Delta Group Revenue
- 5.15 DMX Tecnologias SA DE CV High Power LED Streetlights in Latin America
- 5.16 Echelon
- 5.17 Emcore
  - 5.17.1 Emcore Broadband:
- 5.18 ENDO
  - 5.18.1 Endo Business Environment
  - 5.18.2 Endo Strategy
  - 5.18.3 Endo Technology
- 5.19 Epistar
  - 5.19.1 Epistar Revenue
  - 5.19.2 Epistar Leads the LED Era
- 5.20 Everlight
  - 5.20.1 Everlight Business
  - 5.20.2 Everlight Revenue
  - 5.20.3 Everlight LED Grow Lights GI Flora
  - 5.20.4 Everlight LED Lifestyle Lights
  - 5.20.5 Everlight Electronics LED Innovation
- 5.21 GE Lighting Solutions
  - 5.21.1 General Electric Lighting
  - 5.21.2 GE Tetra EdgeStrip and Tetra miniStrip
  - 5.21.3 GE Evolve LED Fixtures Reduce Auto Dealership's Energy Costs by \$49,000 Annually
  - 5.21.4 GE Scorecard

- 5.21.5 GE Manufactures Electrical Distribution And Control Products, Lighting And Power Panels, Switchgear And Circuit Breakers
- 5.21.6 GE Home & Business Solutions
- 5.21.7 GE Offers Major Home Appliances
- 5.21.8 GE Lamps
- 5.21.9 GE Lighting Solutions
- 5.21.10 GE Healthcare
- 5.21.11 GE Healthcare Regional P&Ls
- 5.21.12 GE Key Medical Care Areas: Cardiology
- 5.21.13 GE Neurology
- 5.21.14 GE Emergency Medicine
- 5.21.15 GE Oncology
- 5.21.16 GE Women's Health
- 5.21.17 GE Healthcare Oxygen Humidifier
- 5.21.18 GE Healthcare Air/O2 Blender
- 5.21.19 GE M2100 Air/O2 Blender
- 5.21.20 GE Invests \$100 Million to Grow its LED Lighting Business; Forms New Strategic Alliance
- 5.21.21 GE Supports Innovation
- 5.21.22 General Electric Offers Wind Turbine Customers Clean Energy From Solar Panels
- 5.22 General Hydroponics
- 5.21 Genesis Photonics (GPI)
  - 5.21.1 Genesis Photonics Year 2014 Revenue
  - 5.21.2 Genesis Photonics 3D COB
- 5.22 GYLED
  - 5.22.1 GYLED LED Lights
  - 5.22.2 GYLED Grille LED Lights
  - 5.22.3 Shanxi Guangyu LED Lighting Co. Ltd. Certifications
- 5.23 Harvatek
- 5.24 Hon Hai
  - 5.24.1 Hon Hai Precision Ind. Co. Ltd.
  - 5.24.2 Hon Hai Precision Industry Ltd/Foxconn
  - 5.24.3 Hon Hai Group Plant Factories
  - 5.24.4 Hon Hai Partners
  - 5.24.5 Hon Hai Establishes First LED Street Light Production Line in Guizhou
- 5.25 Hong Sheng
- 5.26 IEE
- 5.27 Intematix

- 5.27.1 Intematix Remote Phosphor Takes Lead in LED High Bay Lighting Performance
- 5.27.2 Intematix Phosphor Technology
- 5.27.3 Intematix ChromaLit Technology
- 5.28 Iwasaki Electric
  - 5.28.1 Iwasaki Revenue
  - 5.28.2 Iwasaki's Quality Oriented Culture
  - 5.28.3 Iwasaki EYE Hortilux
  - 5.28.4 EYE Lighting International of North America
- 5.29 iWatt
  - 5.29.1 iWatt Flickerless SSL LED Driver is Optimized for Commercial Lighting and Wireless Lighting
- 5.30 Jingge LED
- 5.31 Kingbright
- 5.32 Kingsun
  - 5.32.1 Kingsun Ranked First in Ten Lighting Brands of 2013 GG-Golden Ball Award
  - 5.32.2 Kingsun Won The Bid Of 12.56 Million Rail Transit Lamps Procurement to Increase Market Share
- 5.33 Koizumi
  - 5.33.1 Koizumi Market Positioning
- 5.34 Larson
  - 5.34.1 Larson Electronics 150 Watt LED Light Fixture that operates on 347/480VAC
- 5.35 LED Microsensor NT
  - 5.35.1 LED Microsensor NT Technology
  - 5.35.2 LED Microsensor NT Quality
- 5.36 AU Optronics/Lextar Electronics
  - 5.36.1 Lextar
- 5.37 Lighting Science Group
  - 5.37.1 IEE Names Lighting Science(R) to Top Ten LED Lamp List
  - 5.37.2 Lighting Science Group Files Patents
  - 5.37.3 Lighting Science Group Business
  - 5.37.4 Lighting Science Group Customers
  - 5.37.5 Lighting Science Group Products
  - 5.37.6 Lighting Science Group Target Markets And Customers
  - 5.37.7 Lighting Science Group Strategic Plan
  - 5.37.8 Lighting Science Issues Recall of 554,000 LED Bulbs Because Of Fire Hazard
- 5.38 Lightkiwi, LLC.
- 5.39 Litecontrol
  - 5.39.1 Litecontrol Mission
  - 5.39.2 Litecontrol Aerial Boasts Direct-specific Optical Design

- 5.40 Lite-On Group/Leotek
  - 5.40.1 SMD LED Lite-On Group/Leotek
  - 5.40.2 Lite-On Technology Revenue
- 5.41 Lowcled
- 5.42 Mitsubishi/Verbatim
  - 5.42.1 Verbatim Brand
  - 5.42.2 Verbatim LED Developments
- 5.43 Newport Corporation/ILX Lightwave
  - 5.43.1 Newport Markets
  - 5.43.2 Newport Corporation/ILX Lightwave
  - 5.43.3 ILX Lightwave Product Innovation
- 5.44 Nichia
  - 5.44.1 Nichia Patent Actions
- 5.45 Nihon Advanced Agri Corporation
  - 5.45.1 Nihon Advanced Agri Evolves Agriculture Into Cosmetics And Wellness
  - 5.45.2 Nihon Advanced Agri
  - 5.45.3 Nihon Advanced Agri Business Description
  - 5.45.4 Nihon Advanced Agri Features
  - 5.45.5 Nihon Advanced Agri Plant Factory Business
  - 5.45.6 Nihon Advanced Agri Ceramics
- 5.46 Osram
  - 5.46.1 OSRAM Licht AG
  - 5.46.2 Osram Sylvania
  - 5.46.3 Osram Sylvania Automotive Lighting
  - 5.46.4 Osram Sylvania General Lighting
  - 5.46.5 Osram Sylvania Electronic Control Systems
  - 5.46.6 Osram Sylvania Display/Optic Lighting
  - 5.46.7 Osram Sylvania Canada
  - 5.46.8 Osram Sylvania Basic Data
  - 5.46.9 Osram Revenue Segments
  - 5.46.10 Osram Revenue by Segments
- 5.47 Ohyama/Ohyama Lights
- 5.48 Ozu Corporation
- 5.49 Panasonic
  - 5.49.1 Panasonic Global FY 2015 2Q Financial Results
  - 5.49.2 Panasonic: Technical Computer Solutions For Business
  - 5.49.3 Panasonic: TV
- 5.50 Pihong
- Hihong introduces 40w LED Drivers With A New Case & Optional 0-10v Dimming

- 5.50.1 Pihong A World Leader
- 5.50.2 Pihong Lighting Controls
- 5.51 Philips Lumileds
  - 5.51.1 Philips Lumileds
  - 5.51.2 Philips LED Products
  - 5.51.3 Philips Lumileds Quality White Lighting with LEDs
  - 5.51.4 Philips Luxeon
  - 5.51.5 Philips Lighting Positioning
  - 5.51.6 Royal Philips Electronics Global Presence
  - 5.51.7 Philips Enables Consumer Lifestyle
  - 5.51.8 Philips Addresses Healthcare Landscape
  - 5.51.9 Philips Healthcare Revenue
  - 5.51.10 Philips Accelerate! Positioning
- 5.52 Plessey Semiconductors
- 5.52 Pluz S.A. de C.V./NuVue
  - 5.52.1 NuVue
- 5.53 Prolighting TCP
- 5.54 QD Vision
- 5.55 Rambridge
- 5.56 Ringdale ActiveLED
- 5.57 Samsung
  - 5.57.1 Samsung
  - 5.57.2 Samsung Strategic Change
  - 5.57.3 Samsung Revenue
  - 5.57.4 Samsung Apps
  - 5.57.5 Samsung Display and Information Technology Innovations
  - 5.57.6 Samsung Cameras: Consumer-Inspired Design
  - 5.57.7 Samsung Creating a Future Home Entertainment TV
- 5.58 Sengled
  - 5.58.1 Sengled Smart LED Lights
  - 5.58.2 Sengled Pulse 7.1 LED + Wireless Audio System (C01-BR30 lamp)
  - 5.58.3 Sengled Boost LED + Wi-Fi repeater (A01-A60 LED Lamp)
  - 5.58.4 Sengled LED Lights
- 5.59 Sharp
- 5.60 Shenzhen Hongsheng Optoelectronic Co., Ltd
- 5.61 Shenzhen Hoyol
- 5.62 Shenzhen LEDTEK Optoelectronics Technology Co., Ltd.
- 5.63 Shenzhen Wisdom
- 5.64 Siemens

5.64.1 Siemens Computed Tomography - Multislice CT

5.64.2 Siemens Financial Transparency

5.64.3 Siemens Urban Development Center – The Crystal – In London – Exhibition

Dedicated To Cities

5.64.4 Siemens No. 1 in Sustainability – Carbon Disclosure

5.64.5 Siemens Revenue Growth in Challenging Markets

5.64.6 Siemens Supplies 300 Offshore Wind Turbines to DONG Energy –

5.64.7 Siemens Energy Sector

5.64.8 Siemens/Radium

5.65 Solid State Lighting Systems

5.66 Sony

5.66.1 Sony HD OLED panels

5.67 SolarMax

5.68 Soraa

5.69 Sunleaves Garden Products

5.70 Sunlight Supply

5.70.1 Sun System Grow Lights For Indoor And Greenhouse Gardening

5.71 SunSun Lighting

5.72 Taiwan Floriculture Exports Association

5.73 Tatung

5.73.1 Tatung Eyes LED Plant Factories as New Growth Driver

5.74 TCP

5.75 Thorlabs

5.75.1 Thorlabs Acquires QCL Manufacturer Maxion Technologies

5.75.2 Maxion Technologies

5.75.3 Maxion Technologies

5.75.4 Maxion Technologies

5.75.5 Maxion and the University of Maryland, Baltimore County

5.76 TOA Lighting

5.76 Toshiba LED Lighting

5.76.1 Toshiba Corporation

5.76.2 Toshiba International Corporation

5.76.3 LED Lighting Systems Division

5.76.4 Toshiba World-Leading Diversified Manufacturer

5.76.5 Toshiba Medical Systems

5.76.6 Toshiba America Medical Systems

5.77 Toyoda Gosei

5.78 USALight

5.79 Zumtobel

5.80 Zytech



## List Of Tables

### LIST OF TABLES AND FIGURES

Table ES-1 LED Lamps and Bulbs Market Driving Forces

Table ES-2 LED Light Durability Drives Market Growth

Table ES-3 Illumination Grade White LED Light Sources Quality

Table ES-4 LED Lighting Products Benefits

Figure ES-5 Light Emitting Diode (LED) Light Market Shares, Dollars, 2014

Figure ES-6 LED Light Market Forecasts Dollars, Worldwide, 2015-2020

Figure 1- LED Market Dynamics

Table 1-1 LED System Dimension

Table 1-2 LED Design Dimension

Figure 1-3 LED Design Strength

Table 1-4 LED Quality Standards

Figure 1-5 LED Quality Dimension: Standards and Regulations

Table 1-6 LED Backlight TV/monitor – LEDs Used For Screen Lighting

Figure 1-7 Types of LED Commercial Lighting

Figure 1-8 Bridgelux LED Commercial Lighting

Table 1-9 LED Array Features

Table 1-10 LED Array Benefits

Table 1-11 LED Module Advantage

Table 1-12 LED Module Applications

Figure 1-13 Life-Cycle Assessment Impacts of the Lighting Lamps Analyzed Relative to Incandescent

Figure 1 Life-Cycle Assessment Impacts of the LED Lighting Lamps Analyzed Relative to Impacts Relative To The CFL

Figure 1-15 Lifecycle Energy Use of Different Lights

Figure 1-16 LCA Framework

Figure 1-17 System Boundaries of LED Lifecycle Analysis

Figure 1-18 Comparison of MOCVD Reactor Tray, 6" vs. 2"

Table 1-19 LCA Inventory for the 12.5 Watt LED Lamp in 2012 Stage

Table 2-1 LED Lamps and Bulbs Market Driving Forces

Table 2-2 LED Light Durability Drives Market Growth

Table 2-3 Illumination Grade White LED Light Sources Quality

Table 2-4 LED Lighting Products Benefits

Figure 2-5 Light Emitting Diode (LED) Light Market Shares, Dollars, 2014

Table 2-6 LED Lights Market Shares, Dollars, Worldwide, 2013, 2014

Table 2-7 LED Lights Market Shares, Dollars, Worldwide, First Three Quarters 2014

Figure 2-8 LED Lighting Market Shares, Dollars, Worldwide, First Three Quarters 2014

Table 2-9 Philips Limiteds LUXEON A Features

Table 2-10 Acuity Brands Organic Growth Initiative

Figure 2-11 Acuity LED Sales as a Percent of Total Sales

Figure 2-12 Albemarle LED Positioning

Figure 2-13 LED Light Market Forecasts Dollars, Worldwide, 2014-2020

Table 2-14 LED Lighting Market Shipment Forecasts Dollars, Worldwide, 2014-2020

Figure 2-15 LED Light Shipments Market Forecasts Units, Worldwide, 2014-2020

Table 2-16 LED Lighting Market Shipment Segment Forecasts, Commerical, Outdoor, Traffic Light, Automotive, Residential A, and Residential Par, Units and Dollars, Worldwide,

2014-2020

Table 2-16 (Continued) LED Lighting Market Shipment Segment Forecasts, Commerical, Outdoor, Traffic Light, Automotive, Residential A, and Residential Par, Units and Dollars,

Worldwide, 2014-2020

Table 2-16 (Continued) LED Lighting Market Shipment Segment Forecasts, Commerical, Outdoor, Traffic Light, Automotive, Residential A, and Residential Par, Units and Dollars,

Worldwide, 2014-2020

Figure 2-17 LED Floodlights

Figure 2-18 Outdoor Municipal Street Lights LED Lights

Figure 2-19 LED Outdoor Light Shipments Market Forecasts, Dollars, Worldwide, 2014-2020

Figure 2-20 LED Outdoor Light Shipments Market Forecasts, Units, Worldwide, 2014-2020

Figure 2-21 LED Commerical Light Shipments Market Forecasts Dollars, Worldwide, 2014-2020

Figure 2-22 LED Commerical Light Shipments Market Forecasts Units, Worldwide, 2014-2020

Table 2-23 LED PAR Residential Light Features:

Figure 2-24 LED PAR Lights

Figure 2-25 LED Residential PAR Light Shipments Market Forecasts Dollars, Worldwide, 2014-2020

Figure 2-26 LED PAR Residential Light Shipments Market Forecasts Units, Worldwide, 2014-2020

Figure 2-27 LED Residential A Bulb

Figure 2-28 LED Residential A and Other Lights Market Forecasts, Dollars, Worldwide, 2014-2020

Figure 2-29 LED Residential A and Other Light Shipments Market Forecasts Units, Worldwide, 2014-2020

Figure 2-30 Automotive Ultra Bright SMD LED Light Bulb Towers

Figure 2-31 LED Automotive Light Shipments Market Forecasts Dollars, Worldwide, 2014-2020

Figure 2-32 LED Automotive Light Shipments Market Forecasts Units, Worldwide, 2014-2020

Figure 2-33 LED Traffic Lights Market Forecasts, Dollars, Worldwide, 2014-2020

Figure 2-34 LED Traffic Lights Market Forecasts, Units, Worldwide, 2014-2020

Figure 2-35 Typical LED bulbs

Figure 2- 36 LED Lighting Market Channel Segment Forecasts, Electrical Wlolesalers, Home Centers, and Utilities, Units and Dollars, Worldwide, 2014-2020

Figure 2-36 (Continued) LED Lighting Market Channel Segment Forecasts, Electrical Wlolesalers, Home Centers, and Utilities, Units and Dollars, Worldwide, 2014-2020

Figure 2-36 (Continued) LED Lighting Market Channel Segment Forecasts, Electrical Wlolesalers, Home Centers, and Utilities, Units and Dollars, Worldwide, 2014-2020

Figure 2-37 LED Light Addressable Market Penetration, Market Forecasts Percent, Worldwide, 2013-2019

Figure 2-38 LED Lights, Units, Shipments, Installed Base, and Market Penetration, Worldwide, 2013-2019

Figure 2-39 Area/street LED Lighting Block Diagram

Figure 2-40 Cost Differences, LED Light vs. Incandescent, Dollars, Worldwide, 2014

Figure 2-41 Comparison of LED vs. Incandescent Overall Costs for 50,000 Hours of Luminscence, Dollars, 2012

Table 2-42 LED Lights ROI Analysis Dollars, Worldwide, 2012

Figure 2-43 Incandescent Light Bulb Costs for 50,000 Hours of Light, Dollars, 2012

Figure 2-44 Light Emitting Diodes (LEDs) Market Segments, Dollars, 2012

Figure 2-45 Incandescent and LED Lighting ROI Comparison, Energy, Maintenance, and Investment Dollars, Worldwide, 2012

Figure 2-46 Energy Star Qualified LED Lamps Increasing Over Time

Table 2-47 LED Lighting Business Models Shift

Table 2-48 Mega Trends: LED Market Adoption

Table 2-49 LED Uses: Backlight TV/monitor – LEDs Used For Screen Lighting

Table 2-22 LED Markets, Lighting, LCD and TV Displays, Automotive, Cell Phones, Notebooks, Tablets and Displays, Dollars and Units Shipments, Worldwide, 2013-2019

Figure 2-50 Common Uses of Reflector Lamps

Table 2-51 Lighting Energy Dimension

Figure 2-52 Led Driver Units

Figure 2-53 LED Light Bulbs E26/E27 3W EcoNorm

Figure 2-54 LED Lighting Regional Market Segments, Dollars, 2013

Table 2-55 LED Lighting Regional Market Segments, Dollars, 2013

Table 2-56 LED Global Lighting Trends

Table 2-57 Cree Revenue by Country Percent, Worldwide, 2007-2012

Figure 3-1 GE RDL Range

Figure 3-2 GE Tetra Range

Figure 3-3 GE LED Cove Lighting

Table 3-4 GE's LED Cove Long run Fixture System Features

Table 3-5 GE LED Benefits

Figure 3-6 GE Infusion M4500 Series

Table 3-7 GE Infusion M4500 Series Features & Benefits

Figure 3-8 GE Infusion NPM Series

Table 3-9 GE Infusion NPM Series Retail, Galleries, And Other Display Applications  
Features & Benefits

Figure 3-10 GE Infusion DLM LED Series

Table 3-11 GE Infusion DLM LED Series Applications

Table 3-12 GE Infusion DLM Series Features & Benefits

Figure 3-13 GE Start GLS Bulb

Figure 3-14 GE Infusion NPM Series

Table 3-15 GE Benefits Of White Light

Table 3-16 GE White LED Light Functions

Figure 3-17 GE Okapi LED

Table 3-18 GE Okapi LED Lumin Features

Figure 3-19 GE ERS LED

Table 3-20 GE ERS LED Scalable Fixtures

Figure 3-21 GE LED Area Lighter

Figure 3-22 GE LED Area Lighter Features

Figure 3-23 GE Iberia LED

Table 3-24 GE Iberia LED Functions

Figure 3-25 GE Duna LED

Table 3-26 GE Duna LED Features

Figure 3-27 GE Tetra AL10

Table 3-28 GE Tetra AL10 Features

Table 3-29 GE Tetra miniMAX Features

Figure 3-30 GE Lumination LED Luminaires - EP Series

Table 3-31 GE Lumination LED Luminaires - EP Series Features

Figure 3-32 Osram City Lighting

Figure 3-33 Osram LED Trend: Roadway Lighting, Attractive City Design

Figure 3-34 Osram Street Lighting Savings ROI

Figure 3-35 Osram OLED Orbeos

Table 3-36 Osram OLED Orbeos Product Benefits

Table 3-37 Osram OLED Orbeos Areas of Application

Figure 3-38 Osram LEAF-Pendant LED

Figure 3-39 Osram LEAF-Pendant LED Functions

Figure 3-40 Osram Noxlite LED Spot

Figure 3-41 Osram Noxlite LED Spot Functions

Figure 3-42 Osram Pursos

Figure 3-43 Osram Pursos Features

Figure 3-44 Osram OPTOTRONIC Constant Current LED Power Supplies with LEDset

Table 3-45 Osram OPTOTRONIC Constant Current LED Power Supplies with LEDset Features

Figure 3-46 Osram Sylvania Integrated LED Lamps

Figure 3-47 Osram Sylvania LED Modules & Arrays

Table 3-48 Samsung LED Components Advantages

Figure 3-49 Samsung LED High Power

Figure 3-50 Samsung LED Candle

Figure 3-51 Samsung LED Reflector

Figure 3-52 Samsung LED Light Bulb

Table 3-53 Philips Luxeon High Power LEDs Benefits

Table 3-54 Philips Limileds LUXEON A Features

Table 3-55 Philips Limileds SignalSure Uses

Table 3-56 Philips Limileds SnapLED Uses

Table 3-57 Philips LUXEON 3535 2D Mid-Power LED Features

Figure 3-58 Mitsubshi LED Light Source Equipped with RGB

Figure 3-59 Mitsubshi LED and Lamp Light Source Range

Table 3-60 Verbatim BR30 LED Bulb

Table 3-61 Toshiba offers TLS-RTLS and TLS-RTLM LED Roadway Lighting Features

Table 3-62 Toshiba LED Lighting Features

Table 3-63 Toshiba LED Lighting Applications –

Table 3-64 Toshiba LED Lighting Construction –

Table 3-65 Toshiba LED Lighting Mounting –

Table 3-66 Toshiba LED Lighting Optics –

Table 3-67 Toshiba Roadway LED Key Benefits

Table 3-68 Toshiba LED Lamps

Table 3-69 Toshiba 220-240V LED Lighting Features

Figure 3-70 Toshiba g25 LED Bulb
Table 3-71 Toshiba G25 LED Products
Table 3-72 Toshiba g25 LED Features
Table 3-73 Toshiba DMT6 LED Downlight Features
Table 3-74 Toshiba TLS-DCA6 & TLS-DCA8 LED Downlight Features
Table 3-75 Toshiba TLS-WP LED Wallpack Lighting Features
Table 3-76 Toshiba TLS-ATLS and TLS-ATLM LED Area Lighting Features
Figure 3-77 Adata LED Modules
Table 3-78 Adata LED Chip Benefits
Figure 3-79 Adata Omnidirectional LED Bulb
Figure 3-80 Adata 270° Wide Angle Bulb Design Benefits
Table 3-81 Adata LED Bulb Indoor Application Environments
Figure 3-82 Adata LED Tulip Lamp
Figure 3-83 Adata Tunnel Light
Figure 3-84 Adata Projection Light
Figure 3-85 Adata Warning Light
Figure 3-86 Adata High Bay Light
Figure 3-87 Adata High Bay Light Features
Figure 3-88 Adata Gas Station Light
Figure 3-89 Adata Gas Station Light Features
Figure 3-90 Bridgelux LED Arrays
Figure 3-91 Bridgelux OLM Series
Table 3-92 Bridgelux Vero Series Features
Table 3-93 Bridgelux Vero Series Benefits
Table 3-94 Bridgelux OLM Advantage
Table 3-95 Bridgelux Vero Series Applications
Figure 3-96 Bridgelux Vero Series
Table 3-97 Bridgelux Vero Features
Table 3-98 Bridgelux Vero Benefits
Table 3-99 Bridgelux Vero Advantage
Table 3-100 Bridgelux Vero Applications
Figure 3-101 Bridgelux Vero™ Array Series
Table 3-102 Bridgelux Vero™ Array Series Functions
Figure 3-103 Bridgelux V Series
Table 3-104 LED Retrofit Bulb Applications
Figure 3-105 Bridgelux BXRA3 Series
Table 3-106 Bridgelux BXRA3 LED Array Features
Table 3-107 Bridgelux BXRA3 LED Benefits
Table 3-108 Bridgelux BXRA3 LED Applications



Table 3-109 Bridgelux LED Chips
Figure 3-110 Bridgelux LS Arrays
Table 3-111 Bridgelux LS ArraysFeatures
Figure 3-112 Bridgelux ES Arrays
Table 3-113 Bridgelux ES Arrays Features
Figure 3-114 Bridgelux RS Arrays
Figure 3-115 Bridgelux RS Arrays Features
Figure 3-116 Cree Standard A-Type
Figure 3-117 Cree Reflector (Flood/Spot)
Figure 3-118 Cree CR80-650L Deep Recess LED Downlight
Figure 3-119 Cree CR4
Figure 3-120 Cree 304 Series Interior
Figure 3-121 Delta Light Engines & Modules
Figure 3-122 Delta LED Lamp and Tube EMS
Figure 3-123 Delta Highbay
Figure 3-124 Delta Canopy
Figure 3-125 Delta Parking Garage
Figure 3-126 Delta Parkway Lighting
Figure 3-127 Delta High Lumen Street Lighting
Figure 3-128 Everlight 2835 Package (0.2W)
Figure 3-129 Everlight 5630D Package (0.5W)
Figure 3-130 Everlight Shwo (1W, 3W)
Table 3-131 Leotek CIL and CD Series LED Pedestrian Countdown Signal Modules Features
Table 3-132 Leotek LED Railroad Grade Crossing Signal Features
Table 3-133 Ledtek LEDs
Figure 3-134 GYLED Lights
Table 3-135 Plessey Solid-State LED Lighting Functions
Table 3-136 Plessey LEDs for Solid-State Lighting Benefits
Figure 3-137 Plessey Semiconductor LED Positioning
Figure 3-138 Kingsun LED Street Light
Table 3-139 Kingsun - LED Street Light Types
Figure 3-140 Kingsun Optoelectronic Flow Chart
Figure 3-141 Kingsun LED Lens Quantity
Figure 3-142 Kingsun - LED Courtyard Light
Figure 3-143 Echelon Outdoor Lighting Systems
Figure 3-144 Koizumi LED Lighting Targets Store Lighting
Figure 3-145 Koizumi LED Lighting Positioning
Figure 3-146 Lighting Science Group A19/A60 Omni



Table 3-147 Lighting Science Group A19/A60 Omni Features  
Figure 3-148 Lighting Science Group BR20  
Figure 3-149 Lighting Science Group DFN19/A60  
Figure 3-150 Lighting Science Group PAR16  
Figure 3-151 Lighting Science Group BayLight  
Table 3-152 Lighting Science Group BayLight Features  
Figure 3-153 Lighting Science Group BayLume  
Table 3-154 Lighting Science Group BayLume Features  
Figure 3-155 Lighting Science Group LED Lights  
Figure 3-156 Lighting Science Group LED Lights  
Table 3-157 Lighting Science Group MR16 GU10 Features  
Figure 3-158 Solid State Lighting Systems Tilelite  
Figure 3-159 Solid State Lighting Systems LED Pool Lights  
Figure 3-160 Solid State Lighting Systems Quad Tilelite  
Figure 3-161 LED Microsensor NT Light Emitting Diodes for 1600-2400 nm spectral range  
Table 3-162 LED Microsensor NT Light Emitting Diodes for 1600-2400 nm spectral range Features  
Figure 3-163 LED Microsensor NT Light Emitting Diodes for 2800-5000 nm spectral range  
Table 3-164 LED Microsensor NT Light Emitting Diodes for 2800-5000 nm spectral range  
Figure 3-165 LED Microsensor NT LED Chip Design  
Table 3-166 LED Microsensor NT LED Chip Design Features  
Figure 3-167 Acuity Brands DOM6 LED  
Figure 3-168 Acuity Brands REALITY 6" LED Module  
Figure 3-169 Acuity Brands ELM2 LED  
Figure 3-170 Litecontrol Wall Arcos LED  
Table 3-171 Litecontrol Wall Arcos LED  
Figure 3-172 Litecontrol Aerial  
Figure 3-173 Intematix ChromaLit  
Table 3-174 Intematix ChromaLit  
Table 3-175 QLED Benefits For The Solid State Lighting  
Figure 3-176 QD Vision QLED performance  
Table 3-177 QLED Technology Benefits In Color Displays/Lighting Devices  
Figure 3-178 QD Vision QLEDS  
Table 3-179 QLED Features  
Figure 3-180 Prolighting TCP LEDs  
Figure 3-181 Prolighting TCP LEDs

Figure 3-182 ATG Electronics LEDs  
Figure 3-183 Utech Led Accessories  
Figure 3-184 Advantech Lighting Solutions/NaturaLED  
Figure 3-185 GreeneLED Sample Products  
Figure 3-186 Lightkiwi, LLC. LED Lights  
Figure 3-187 NuVue MR16 6\*1W (7W )Max  
Figure 3-188 NuVue.LED  
Figure 3-189 Albemarle LED Positioning.  
Figure 3-190 Larson Electronics Tower LED Lights  
Figure 3-191 Nichia LED Series Offerings  
Figure 3-192 Toyoda Gosei Blue LED Technology Products  
Figure 3-193 Toyoda Gosei LED Solutions  
Figure 3-194 Toyoda Gosei Amusement Equipment LED Solutions  
Figure 3-195 Epistar LEDs Lighting Arrangement  
Figure 3-196 Epistar LED Lighting Potential  
Figure 3-197 Epistar LED Lighting Decorations  
Figure 3-198 Epistar LED Lighting  
Table 4-1 LED Lighting Market Technology Segment Forecasts, InGaN Low Power, InGaN Mid Power, InGaN Hi Power InGaAIP Low Power, InGaAIP Mid Power, and InGaAIP Hi Power, Units and

Dollars, Worldwide, 2014-2020

Table 4-1 (Continued) LED Lighting Market Technology Segment Forecasts, InGaN Low Power, InGaN Mid Power, InGaN Hi Power InGaAIP Low Power, InGaAIP Mid Power, and InGaAIP Hi

Power, Units and Dollars, Worldwide, 2014-2020

Table 4-1 (Continued) LED Lighting Market Technology Segment Forecasts, InGaN Low Power, InGaN Mid Power, InGaN Hi Power InGaAIP Low Power, InGaAIP Mid Power, and InGaAIP Hi

Power, Units and Dollars, Worldwide, 2014-2020

Table 4-2 Plessey LEDs for Solid-State Lighting Benefits

Figure 4-3 Albemarle Projected LED Materials Growth

Figure 4-4 LED Power Supply Architectures

Figure 4-5 IEE Top Ten LED Lamp List, 2013

Figure 4-6 Energy Star Qualified LED Lamps

Table 4-7 Utility Investments In Electric Efficiency Programs

Figure 4-8 Albemarle Well Positioned To Thrive As LED Market Adoption Occurs

Figure 4-9 Gains from Disruptive Manufacturing Technologies: GaN-on-GaN, GaN-on-Si

Figure 4-10 Sora Inc LED Large Surface Area To Junction Area

Table 4-11 LED Colors and Common Chemistries

Figure 4-12 Global Lighting Association Solid State Lighting SSL Performance Roadmap

Figure 4-13 LED Lighting Controls

Table 4-14 LED Environmental Dimension

Table 4-15 Biologically Effective Lighting

Table 4-16 LED Light Benefits

Table 4-17 LED Biological Dimension Implementation

Figure 4-18 LED Biological Dimension Illustration

Figure 4-19 General Types of White Light Emitting Diodes LEDs

Figure 4-20 Stages And The Major Steps of LED Manufacturing

Figure 4-21 Steps Associated with Sapphire Wafer Substrate Manufacture

Figure 4-22 Philips Example of Finished Packaged LED

Figure 4-23 Efficacy of Conventional Light Sources Versus LEDs.

Figure 4-24 ATG Electronics Standards Compliance

Figure 4-25 Flexible OLED Lighting Systems

Figure 4-26 Flexible OLEDs Made By Roll-To-Roll Manufacturing

Table 4-27 Aims of OLED Production

Table 4-28 Challenges of OLED Production

Figure 5-1 Acuity Target Customers

Figure 5-2 Acuity North America Lighting Market Shares

Figure 5-3 Acuity Strategy

Figure 5-4 Acuity Organic Growth Strategy

Figure 5-5 Acuity Tiered Solution Strategy

Figure 5-6 Acuity Market Opportunity in Lighting

Figure 5-7 Acuity Acquisition Strategy

Figure 5-8 Venture Lighting International Human Eye Response Curve

Figure 5-9 Venture Lighting/Sunmaster Plant Response Curve

Figure 5-10 Venture Lighting Efficiencies of Light Sources Used in Plant Growth

Figure 5-11 Albemarle Well Positioned To Thrive As LED Market Adoption Occurs

Table 5-12 Albemarle Business Segments

Figure 5-13 Albemarle Refinery Catalyst Solutions

Figure 5-14 Albemarle Performance Catalyst Solutions

Figure 5-15 Albemarle Global Expansion

Table 5-16 Albemarle Process Additives

Figure 5-17 Black Dog LED Platinum XL ROI Cost Savings Running Total

Table 5-18 Cree Licensees And The License Description  
Table 5-19 Cree Lighting Portfolio Of Lighting Products Applications.  
Table 5-20 Cree LED Research and Development Issues  
Figure 5-21 Delta Group Data Center Power  
Figure 5-22 Delta Group Data Center Power InfraSuite Components  
Table 5-23 Delta Group InfraSuite Advantages  
Figure 5-24 Delta Group Renewable Energy Solutions  
Figure 5-19 Endo LEDZ Lighting Brightness Retention  
Figure 5-20 Endo Service Life Of White LEDs  
Figure 5-25 Epistar Management's Beliefs  
Figure 5-26 Epistar Headquarters  
Figure 5-27 GE Scorecard 2013, 2012

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