

# GROWING MARKET FOR LIGHTING FIXTURES IN RUSSIA



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The Russian market for lighting fixtures totalled Eur 1,488 million in 2013, accounting for an average yearly growth of 5.5% (in EUR) during the last six years. In local currency, the average growth is in the region of 8.6% per year. The Central District (including Moscow) still generates most of the lighting fixtures sales (36%), although its weight is by far less predominant than ten years ago (55%).

In 2012, China and Italy together accounted for around 54% of total Russian imports. Imports from Italy were relatively stable during the period 2007-2012, while imports from China grew 25% yearly on average. Germany, Austria (both growing fast) and Poland (relatively flat) followed at a distance.

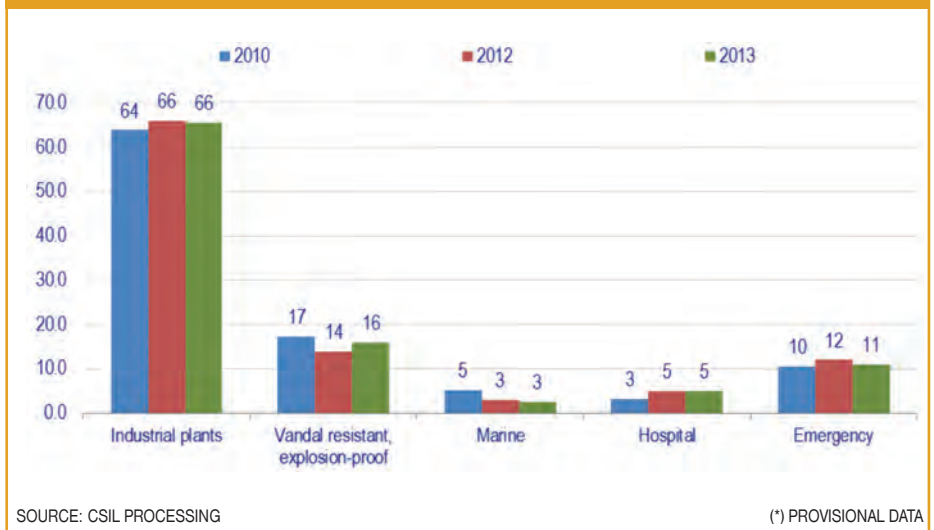
LEDs account for about 12% of Russian lighting fixtures market for the year 2013. Applications of LEDs in the Russian market are mainly recorded for commercial lighting (38%) and outdoor lighting (38%), followed by industrial lighting (19%) and consumer/residential lighting (5%). The Russian market for commercial lighting is made by a comparatively higher share of lighting for offices and a relatively lower share of lighting for hospitality. 60 Top companies control 70% of the Russian market for lighting fixtures.

**Lighting Technologies** and **Boos Lighting** are market leaders, accounting for 8%-9% market share each.

In 2013 the emerging Russian market for LED lighting is expected to grow by 55% (growth in 2012 was 20%). CSIL estimates that the share of LED lighting on the total market for lighting fixtures will be 20% or more by 2015.

LED-based road lighting is one of the most attractive and dynamic markets in Russia and one which is showing a fast developing trend.

RUSSIA. INDUSTRIAL LIGHTING. SALES BREAKDOWN BY PRODUCT, 2010-2012-2013\*. PERCENTAGES



A State programme for the modernization of road lighting, where the share of LED lighting will reach 50% by the year 2015, has definitely contributed to the rapid development of the market.

Any analysis of the prospects for Russian demand requires a separate approach for each Federal District, with particular attention to the main urban centres. Moscow and St. Petersburg are considered the main "gateways" to

the Russian market and they are Russia's key commercial and transportation hubs. Both Moscow and St. Petersburg are well connected to the rest of the country by road, rail and air transport.

The continuous development of the transportation infrastructure in Russia and the overall economic growth in the Regions resulted in more direct import flows directed to other areas of the country, bypassing the two capitals.

More on the Russian market by CSIL:

*The lighting fixtures market in Russia (2013 edition)*

*The kitchen furniture market in Russia (2013 edition)*

*The office furniture market in Russia (2014 edition)*

*Furniture Distribution in Russia (2012 edition)*

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