

by A.V.

GREETINGS FROM LIGHT+BUILDING FRANKFURT

Restart for Light + Building after two years of pandemic has been more than successful. 92,838 visitors from 147 countries travelled to Frankfurt. In 2024, the fair will again occupy its usual spring slot. During the show (02-06 October 2022) CSIL interviewed some 100 among the most relevant 1500 exhibitors.

ARCHITECTURAL GREETINGS FROM HALL 3

Ridi operates several producing locations in Germany and a small factory in Poland.

The focus of production in Jungingen is on louvre luminaires, lighting systems, architectural lighting, and special luminaires. A wide range of luminaire components are also produced here for the company's plants in Zeuthen and Rellingen. The 2,800 sq.m. of the Rellingen site are set aside exclusively for production of the RIDI LINEA continuous lighting system. Zeuthen production centre manufactures diffuser luminaires, pendant luminaires, and continuous lighting systems over an area of 15,000 sq.m. The Spectral brand was acquired in 2010 and is continuously on growth. In term of sales, the company reported a very good performance in 2021 and further increase in 2022. The most dynamic segment was lighting for warehouses, due to the booming of e-commerce. A strong increase in their sales is expected in 2023 for refurbishing offices as September 2023 is the deadline set by the EU regulation that ban all fluorescent lighting. In term of connectivity, the company develops own software in-house. Li-Fi product line provides high-end light fittings for private use, hotels or stylish offices.

Secto Design is a Finnish company specialized in design lamps made of local birch wood. Between 2020 and 2022, they experienced a strong growth of their retail business driven by a booming in e-commerce sales.

Light-Point has been producing decorative lighting fixtures for indoor (60%) and outdoor (40%) spaces and for residential (50%) and commercial applications (50%). In term of connectivity, they offer Casambi controls. At I+b, they launched a new collection developed in collaboration with Studio A. F. Porsche.

Since the beginning of the "Poldina" lamp, **Zafferano** has been recognized as one of the main operators in the market segment of LED and wireless lighting. With a consolidated turnover of over EUR 30 million expected at the end of 2021, the group has a consolidated presence in Italy and Central Europe. With Zafferano LLC in 2019, the company

started a process of penetration in North America. Recently Zafferano opened its showroom in Milan. **Gradiente II** together with co-investors Qualitas Equity acquired a 70% stake in the company.

Martinelli Luce reported good results in term of revenues for 2020-2022. In term of connectivity, they offer Casambi protocol and the Light You Light app. However, for design solutions, the demand for this technology is still very low.

They presented a collection of outdoor luminaires, including Cyborg (in different sizes), FROG, and DIA; and indoor lighting, such as GRU (floor), Metrica (floor, table, wall), Cordon, Cabriolette, Avro (designed by Studio Natural, a pendant lamp that conceals a socket in the lower part of its shade), and Cobra (for the centenary of Elio Martinelli's birth, the iconic lamp has been presented in yellow colour).



OUTDOOR AND INDUSTRIAL LIGHTING AT HALL 4

Benito Urban ranks third among largest outdoor lighting providers in Spain. Their sales break down in 80% urban lighting and 20% large areas (mainly sport and stadiums). 2023 is going to be a very good year in Spain for outdoor public lighting sales as municipalities elections will boost investments. Connected lighting systems are growing faster than the market. In 2021 the share of connected luminaires was 5% of the total sales, increasing by 10% in 2022. Small solutions for specific projects are preferred to large infrastructures as they can better keep up with the development of the technology. They both develop in-house system and operate partnership with IT providers.

They offer three solutions: ONfield sport (lighting for all kinds of sport equipment); ONfield DMX, RGBW (lighting for monuments, façade, and squares); ONfield urban (luminaire networks via APP, optimising consumption and adapting the light colour with the time of the day). **Goccia Illuminazione** has been producing outdoor lighting for Italy (60%) and the world (40%). They developed their first LED luminaire in 2007.

Today almost their entire catalogue offers LED products. The share of connected products of their total sales is limited (less than 5%). They mainly adopt the DALI protocol, less the Casambi one.

Petridis is the largest local manufacturer of lighting fixtures in Greece. Their sales include 70% indoor (40% residential, 40% Commercial, 20% Industrial) and 30% outdoor. 100% of their product is LED. Their products are only adopted to be connected thought the installation of smart drivers mainly from Tridonic, for which they also operate as distributors in Greece, as well as for Zumtobel (outdoor products).

Established in 1984, **Youngkong** specializes in outdoor lighting fixtures (20% residential, 80% urban/architectural). In 2022 they launched their first fully connected urban pole lighting, Polestar.

Fumagalli has a highly automatized plant for outdoor lighting (mainly residential, also street lighting up to 6 meters). Most of their products are LED, but they also offer some solar luminaires. After the pandemic, Fumagalli experienced a strong growth, as they managed to substitute Chinese products in some markets. **GMR Enlights** specializes in the outdoor segment.

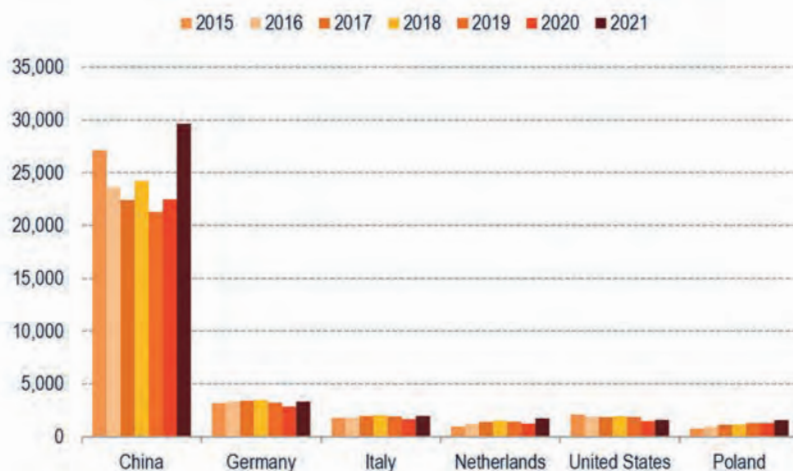
Exports is mainly directed towards the Middle East.

Turning to the Modern with Dino Gavina expertise and LED lighting since 2009, 100% of the company sales come from LED products. They have been developing their own smart systems, but its impact on the company's revenues is still limited. To tackle the increasing cost of energy, the company has invested in photovoltaic system in their production plant. **Robe Lighting** operates with two brands: Robe (90% of total turnover), specialized in entertainment lighting, Anolis (10%), which focuses on theatrical (7%) and architectural lighting (3%). In May 2022, the company launched a new brand for outdoor application: Calumma. The company offers in-house developed control systems, adopting several standards such as DMX, DALI, and ARTNET (for large projects).

Founded in 1979, **Olympia Electronics** is the dominant Greek enterprise in the electronics safety and security industry. They offer wireless emergency lighting monitors that connect up to 1,000 luminaires.

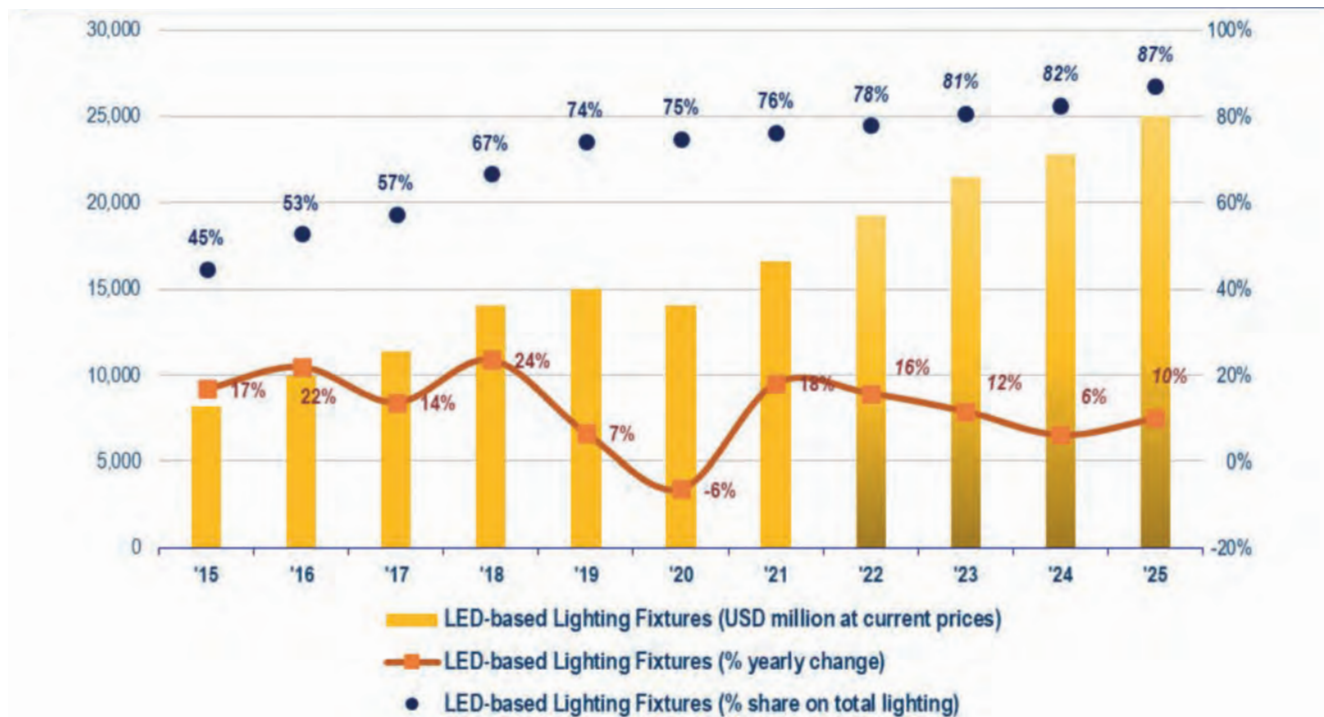
Fotodiasiasi is one of the major European players in the Christmas and event lighting sector. Smart applications are worth approximately 25% of the company turnover.

SIX MAJOR EXPORTING COUNTRIES OF LIGHTING FIXTURES. EXPORTS, 2015-2021. USD MILLION



Source: CSIL report 'LEDs and the Worldwide Market for Connected Lighting'

EUROPEAN UNION (27) + NORWAY, SWITZERLAND AND THE UK. LED BASED LIGHTING FIXTURES SALES, 2015-2021 ESTIMATED DATA AND 2022-2025 FORECASTS. USD MILLION, % SHARE AND % YEARLY CHANGE



Source: CSIL report 'LEDs and the Worldwide Market for Connected Lighting'

Tep Ex is a Croatian company specialized in explosion-protected electrical equipment. In term of smart application, they adopt the DALI protocol.

Vizulo, based in Latvia, is an international manufacturer of street luminaires, floodlighting, and professional lighting, with a focus on smart city concept development. Smart applications have reached 35-40% of total sales. They use different protocols (DALI, RGB, ZAGG). The highest demand comes from office and retail systems and parking solutions. **Ragni** has built a new warehouse during 2020, besides four branches, including Denver (USA) and Mostar (Bosnia).

The group has strategic partnerships, like the merger with Novéa Energies, a French specialist in solar street lighting. The company offers connected solution for street lighting applications.

The demand for this type of systems

has been increasing more and more to reach a share of 40%. **Elkovo** is Czech manufacturer of technical lighting for offices, hospitals, and sport areas (indoor). 50% of their connected lighting system adopt DALI protocol. **Elstead Lighting** specializes in decorative lighting for indoor and outdoor applications. Online sales increased as several retail purchases moved from end customers to online customers to reach a share of 60-65% of total sales.

MEETS RESIDENTIAL LIGHTING AT HALL 6.0

Osmont is a Czech lighting manufacturer of interior and exterior decorative light fittings since 1991 with main destinations: hospitals, hospitality and schools.

They offer industrial, and outdoor garden shades. Turnover grew by 10%-15% during 2021 and kept increasing by 5% during 2022. DALI

protocol has been installed in around 40% of their products.

Nordlux is a Danish company with affiliates in Norway, Germany and in China. It specializes in decorative lighting (100% made in China) and it operates four brands: Design for the People (Danish designers, mainly for lighting specialists and architects), Nordlux (functional and affordable design, also e-commerce), Lampekonsulenten (by Norwegian designers, simple and functional, mainly for furniture stores), SeeMee (campaign items and private label). Part of the Yankon Group (China) since 2017, their sales can be broken down in 45% residential lighting, 20% professional, and 35% lamps. Online sales are operated through Next (UK), LightShop.com (Denmark) and others lighting specialists with online sales and e-tailers. They have developed a specific brand for smart lighting applications: **Nordlux Smart Light**.