



LEDs and the worldwide market for lighting fixtures

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Director

LAB - Division



CSIL Centre for Industrial Studies: an overview...

WHO WE ARE

Founded in Milan (Italy) in 1980, the Centre for Industrial Studies (CSIL) is an independent research and consulting company specialized in applied economic research, market analysis, SMEs economics, evaluation of public investment projects and development policies.

WHAT WE DO

The research activities at CSIL are structured around two distinct but interrelated business areas:

- **Industry Studies and Market Research**
- **Development and Evaluation Studies**

Consistency and complementarity are ensured by: a common statistical office and a scientific committee providing quality control over the methodological approach.

OUR VISION

CSIL pursues an empirical and experimental perspective, based on the direct observation of evidence with a concrete and versatile approach. CSIL experts pursue their work with intellectual integrity and a genuine passion for understanding growth and innovation processes.



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- Founding Partner and President of the Scientific Committee of CSIL.
- MSc in Business Administration.
- Over 30 years of working experience in the field of competitiveness assessment, market performance analysis, industry benchmarking
- Customized and multicient market research in Europe, Russia, Turkey, China, India, Japan, United States, Latin America, Middle East, Africa.

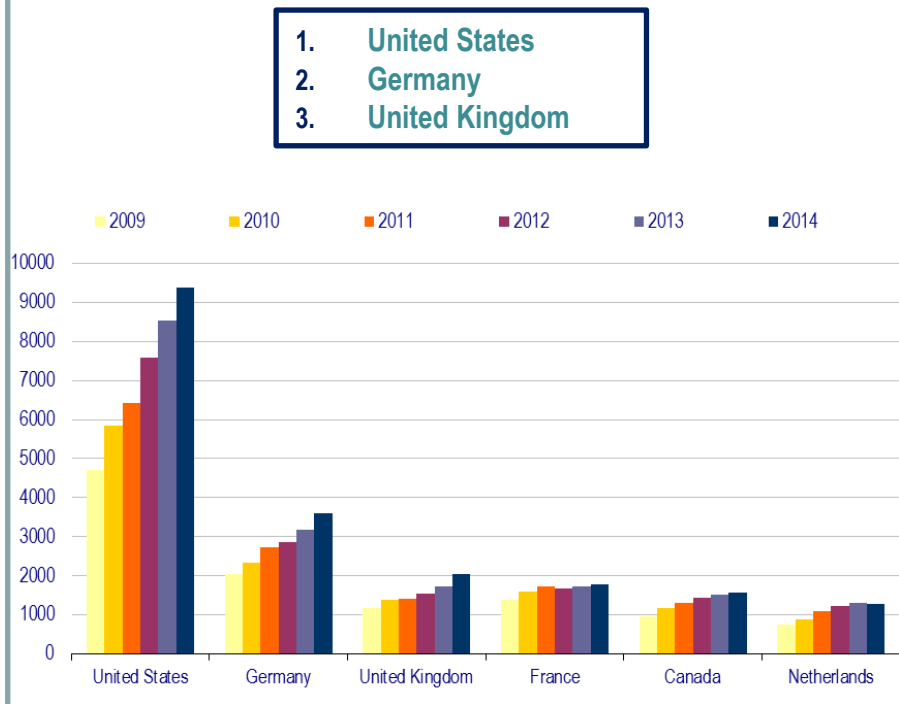
LAB | the Laboratory Innovation unit

provides market research and business intelligence services. It mainly focus on the lighting supply chain (including LEDs, lighting fixtures and related business), KBA (kitchen furniture, bathroom fittings, appliances) and eco-building issues.



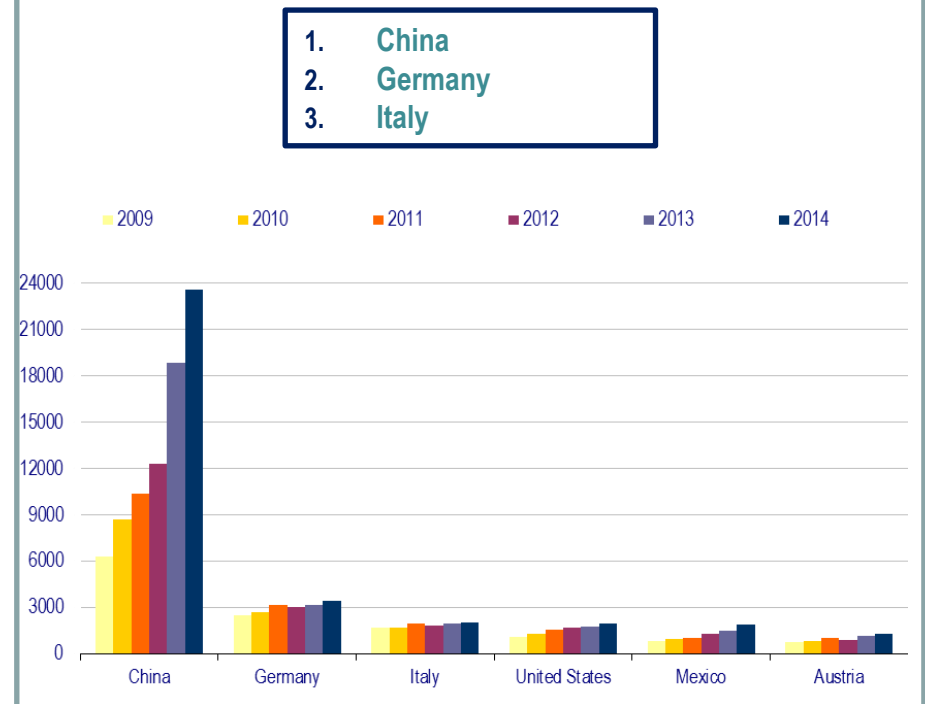
An overview: the international trade of lighting fixtures worldwide

Major importers of lighting fixtures. Imports, 2009-2014.
US\$ million



Source: CSIL processing data

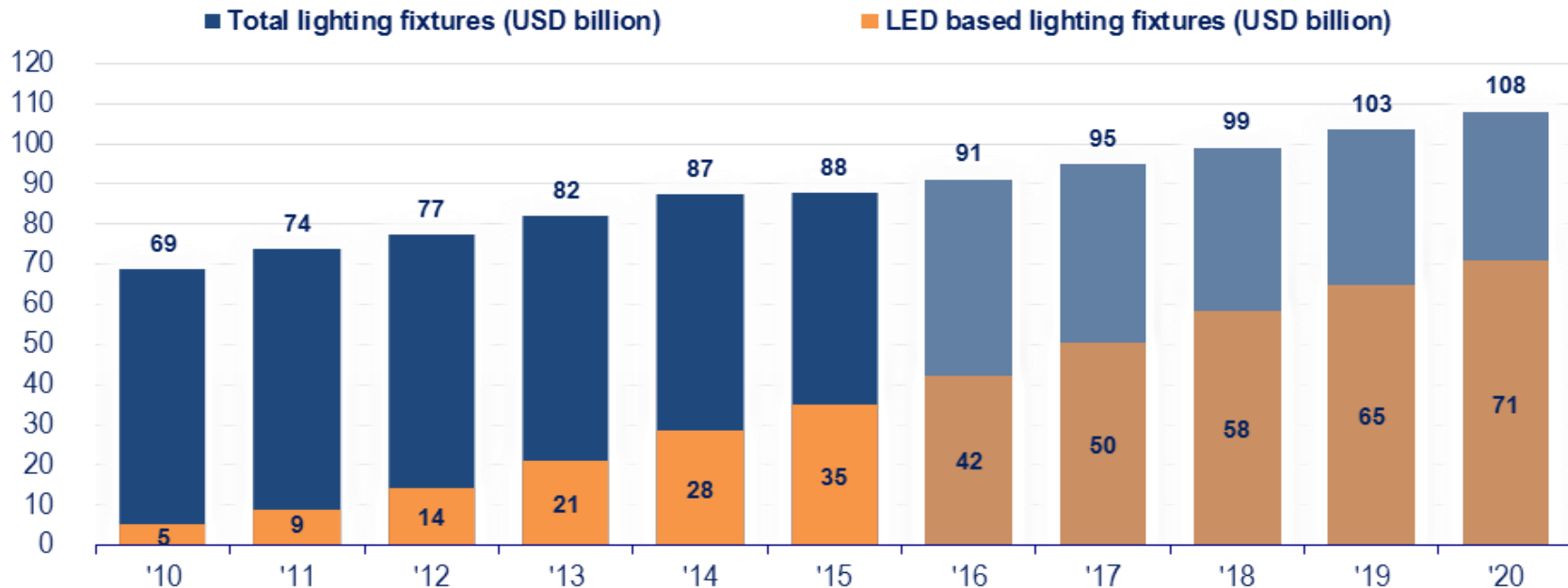
Major exporters of lighting fixtures. Exports, 2009-2014.
US\$ million





A long run perspective: the world LED lighting market evolution

Worldwide market. Consumption of total lighting fixtures and LED based lighting fixtures, 2010-2015 estimated data and 2016-2020 forecasts. USD billion



Source: CSIL processing data



Highlights: What happened in 2015? What's next?

AT GLANCE

- In 2015, LED lighting market was worth USD 35 billion; it is projected to reach USD 70 billion by 2020
- Top 100 manufacturers hold 55% of the market
- Top 100 reached a market penetration of 60% and an average growth rate closed to 40%

PRODUCT BREAKDOWN

- 25% retrofit bulbs, 75% fixtures
- 11% residential, 59% technical indoor, 30% outdoor

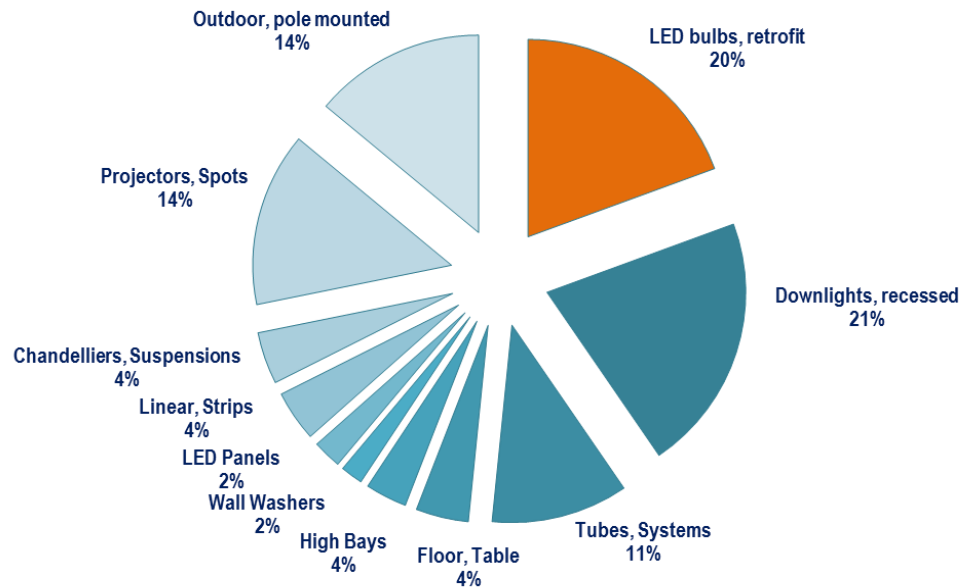
MARKET STRUCTURE

- LED penetration (on overall fixtures): 1.4% in 2010, 7.3% in 2010, 39.6% in 2015, possibly 65.5% by 2020
- 20-25% of LED lighting sales is from contract segment



Focus on Products: a breakdown of the market

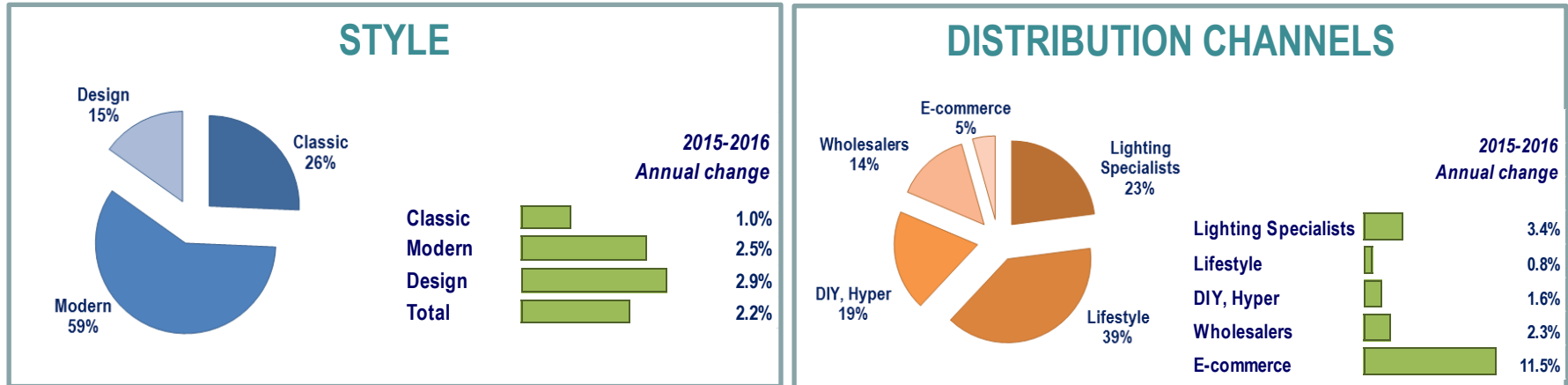
Worldwide market. Consumption of LED based lighting by main products, 2015. % share in values



Source: CSIL processing data

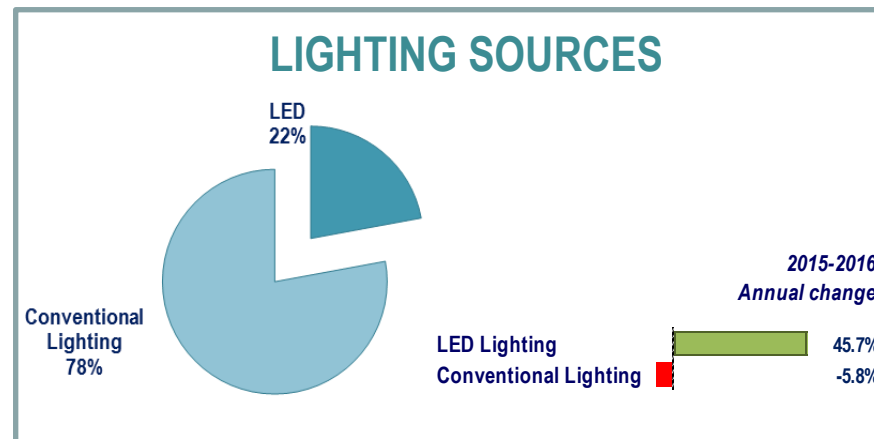


Focus on Europe: the consumer lighting fixtures market in 2016* at glance



Source: CSIL processing data

(* data refers to 16 West European countries in the first semester of 2016





Other CSIL reports related to lighting fixtures

LIGHTING.csilmilano.com

market research - economic analysis - forecasts



- “World trade of lighting fixtures” (2016 edition).
- “The European market for outdoor lighting fixtures” (2016 edition);
- “The European market for lighting fixtures” (2016 edition);
- “The lighting fixtures market in Central-Eastern Europe” (2016 edition);
- “The lighting fixtures market in China” (2016 edition);
- “The lighting fixtures market in Russia” (2016 edition);
- “The lighting fixtures market in the United States” (2016 edition);
- “The lighting fixtures market in Turkey” (2016 edition);
- “The lighting fixtures market in India” (2016 edition);
- “The lighting fixtures market in Asia Pacific” (2015 edition)



Thank you for the attention!

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