VERIFY MARKETS

Analysis of the United States Commercial & Industrial Lighting Control Systems Market

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Executive Summary

United States Commercial & Industrial Lighting Controls Market

Methodology

The Analysis of the Commercial and Industrial Lighting Control Systems Market research report was conceptualized as an overview of the current state of affairs for the lighting control systems industry. The marketplace is in a major state of transition and this report should aid companies in determining the best way to address the changing industry. The study will include major issues in the lighting market, its current structure, an understanding of stakeholder decision-making and specification for both the centralized panel-based and highly integrated distributed lighting controls systems market. This analysis will further quantify the opportunity and growth for the systems market. The study will also provide also qualitative information on trends and challenges facing industry.

For the purpose of data collection for this study, select combinations of market participants were independently interviewed. Research was conducted primarily through phone interviews with chosen market participants and supplemented with comprehensive secondary research. In combination with an extensive lighting control industry knowledge and secondary research, this study has been compiled to convey to the most clear and concise representation of the current state of the lighting control systems marketplace and its direction going forward.

Profiles of Interviewees:

Lighting control systems manufacturers – vice presidents, product managers, sales & marketing executives, channel marketing managers, engineers, etc.

Large wholesale distributors – vice presidents, channel marketing managers, localized sales executives, sales managers, lighting control specialists, engineers, etc.

Other appropriate stakeholders – lighting designers, sales representatives, resellers, localized distributors, installers, commissioners, architects, engineers, etc.

Market Definitions

Highly Integrated Distributed Lighting Controls Systems – Refers to a decentralized system with integrated controls that are able to communicate with feedback and analytics functionality. Such systems include wired and wireless networked lighting controls. This system is referred to as a lighting control system interchangeably throughout the report.

Centralized Panel-Based Lighting Controls (PBLCs) – Defined as lighting controls with zone specific functionality. In some cases, multiple zones can be integrated into a larger lighting control system. However, these systems are application specific and generally do not have advanced control feedback capabilities.

- Control modules include relay panels, group controllers, scene controllers, DMX controllers, communicating fixtures and ballasts
- User-interfaces include sliders, touch panels, networked systems with software solution, timers and dimmers
- Sensors include occupancy, daylighting and other sensors

Standalone lighting controls are not included in this analysis. Information on this established market is available in other Verify Markets reports.

Summary of Findings

The path to market for manufacturers operating in the lighting control systems marketplace is predominantly through a traditional electrical product distribution model. There are emerging direct channels, where companies sell and specify direct to end-users and through value-added resellers (VARs).

Lighting control systems have experienced incredible growth in recent years. This growth should sustain and increase throughout the forecast period. This circumstance is predominantly due to changing energy codes, the shift to LEDs, industry acceptance of wireless technologies and overall industry awareness, among others.

Many manufacturer sales representatives, or lighting agencies, have developed a greater understanding of engineering and lighting design to try and protect their position in the value chain. Similarly, some choice electrical distributors have created a more consultative sales channel focused on energy audits. In recent years, these distributors have developed a breadth in engineering and lighting design. Both channel participants are attempting to address the changing dynamic in the marketplace as the anticipation of new technologies / systems and upcoming changes in energy codes are will change end-user requirements.