
LIGHTING CONTROLS MARKET IN NORTH AMERICA



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EXECUTIVE SUMMARY LIGHTING CONTROLS MARKET IN EUROPE AND NORTH AMERICA



RESEARCH SCOPE: OBJECTIVE AND COUNTRY COVERAGE

OBJECTIVE OF THE RESEARCH

- To provide information and data on market size for the European and North American lighting controls equipment market, leading market participants, key end-user groups and market trends.

North America

- USA
- Canada

Europe

- Germany
- France
- United Kingdom (UK)
- Italy
- Spain
- Rest of Western Europe (Belgium, Netherlands, Luxembourg, Denmark, Sweden, Norway, Finland)
- Central and Eastern Europe (Poland, Hungary, Czech Republic)

RESEARCH SCOPE: PRODUCT AND SYSTEMS COVERAGE

Lighting Controls

- Control modules include relay panels, group controllers, scene controllers and DMX controllers
- User-interfaces include sliders, touch panels, timers and dimmers
- Sensors include occupancy and other sensors

Lighting Controls Systems

- Centralized vs. Decentralized (Distributed)
- Dimmers and Sensors
- Fixtures
- Networked

RESEARCH SCOPE: END USER AND APPLICATION COVERAGE

End User Groups

- Residential
- Commercial e.g. offices, retail, hospitality
- Public e.g. education, healthcare, city buildings and infrastructure
- Industrial e.g. factories, warehouses, plants

Lighting Controls Application

- New Construction
- Major Renovation
- Retrofit

KEY MARKET TRENDS FOR EUROPEAN AND NORTH AMERICAN LIGHTING CONTROLS MARKETS

The regional markets hold promise with increasing energy costs and demand for energy conservation. Market growth is also highly driven by regulatory mandates and government spending on energy conservation initiatives.

Drivers

The need for energy savings and short and easy payback benefits.

Government funds and utilities rebates

Increasing legislation and efficiency mandates/standards

The need for commissioning and M & V

End user demand for more technological advances and interoperable and open systems

The need for ambience and scene settings

Restraints

Sluggish economy and construction limits capital and discretionary spending

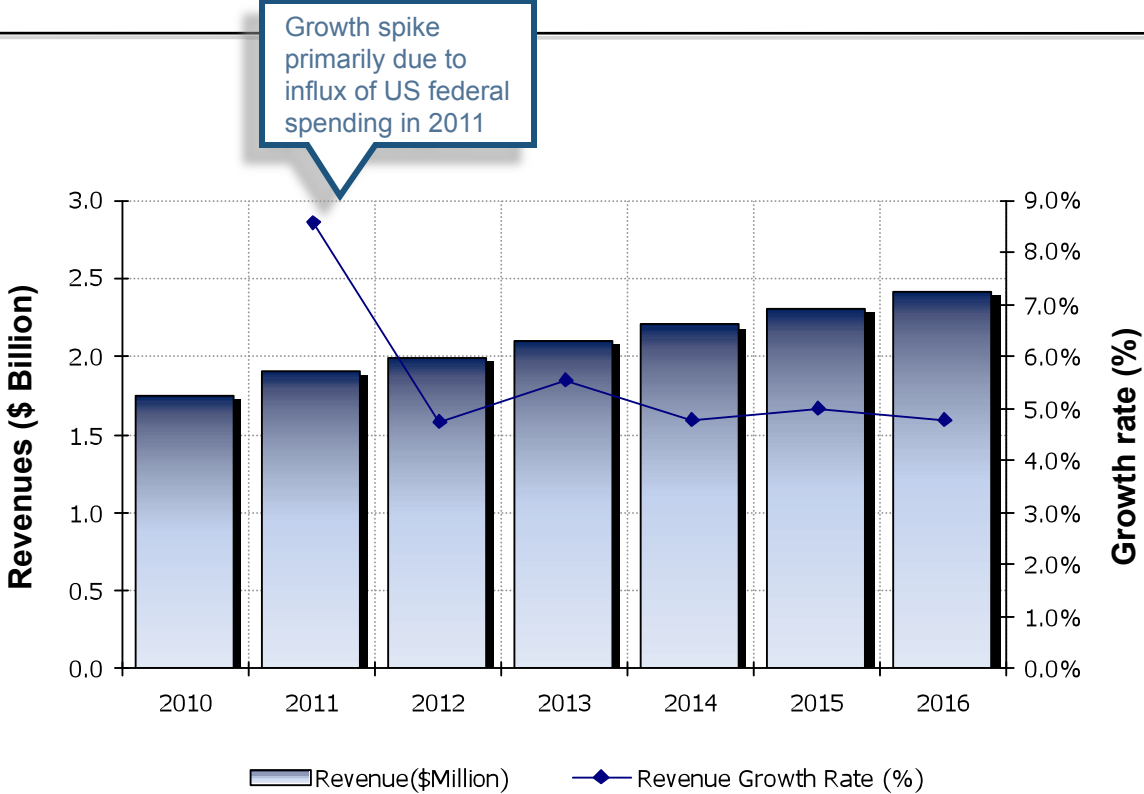
More efficient light source (CFL, LED) diminishes ROI for lighting controls measurements.

Lack of skilled installers and integrators and a common tendency to misunderstand lighting systems

High cost of lighting controls systems and extensive installation costs.

REVENUE FORECAST FOR THE EUROPEAN AND NORTH AMERICAN LIGHTING CONTROLS MARKET


Year	Revenues (\$ Million)	Growth Rate (%)
2010	1.75	--
2011	1.90	8.6
2012	1.99	4.7
2013	2.10	5.5
2014	2.20	4.8
2015	2.32	5.0
2016	2.42	4.8
CAGR		4.2%



CAGR: Compound Annual Growth Rate: (2011-2016)
Base year is 2011

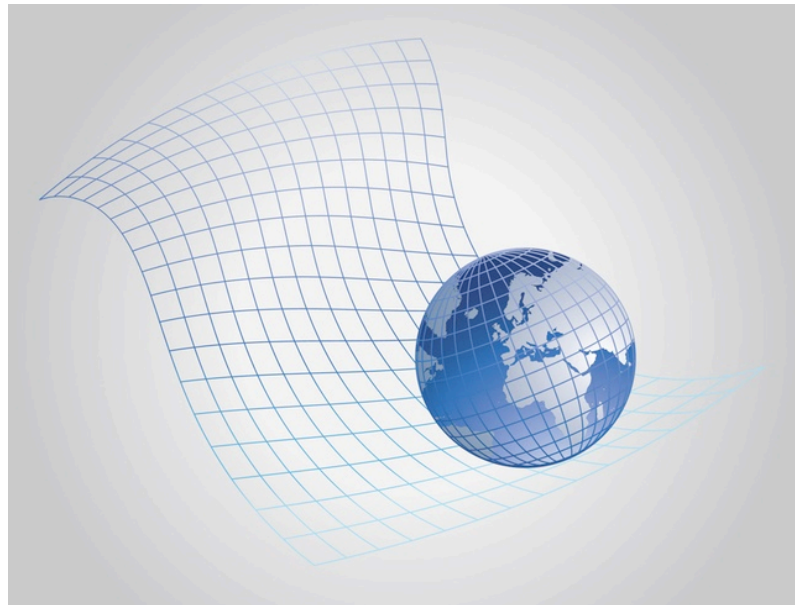
The North American and European lighting controls market was worth \$1.90 billion in 2011. The combined regional markets are expected to reach \$2.42 billion in 2016.

LIGHTING CONTROLS COMPANIES RANKED BY MARKET SHARE

	<u>North America</u>	<u>Europe</u>
1.		
2.		
3.		
4.		
5.		
6.		

ABOUT VERIFY MARKETS

Verify Markets is a research firm specializing in Industrial, Environmental, Energy and Water markets. Our Research & Consulting practice provides global industry analysis, custom engagements, end-user analysis, strategy consulting, strategic market intelligence, and forecasts that are designed to facilitate strategic decision-making. Our team of consultants, industry experts and analysts continually monitor and evaluate information to create insights for your business needs.



METHODOLOGY

The methodology when formulating market trend projection is outlined below.

Step 1: Determine historical trends

- Collect secondary research. Accumulate database information, published sources, industry reports, and so on.
- Execute primary research. Schedule and conduct interviews with leading market competitors, distributors, key end-users and other industry stakeholders.
- Historical trending information provides us with a context regarding price trends, previous sales figures, market shares, and so forth.

Step 2: Measure base year numbers

– We conduct interviews with the following groups in order to determine the accuracy of the base year numbers that we have built and the trends that we are projecting:

- Manufactures/Suppliers
- Government agencies
- Market research experts

Step 3: Forecasts:

– Market drivers and restraints have been built into a forecasting model to estimate base revenue, growth and market size figures.

For questions or more information, please
contact us at www.verifymarkets.com.

Verify Markets

www.verifymarkets.com

info@verifymarkets.com

210.595.9687