

Lighting Fixtures Market in Japan: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on the lighting fixtures market with the following conditions:

1. Research period: From September to November, 2011
2. Research targets: Lighting fixtures market players, wholesalers of electricity materials, lighting-related organizations
3. Research methodologies: face-to-face interviews by the specialized researchers, survey via telephone, and literature research

<What is the lighting fixture market?>

The lighting fixture in this research indicates lighting equipments and lamps using incandescent lights, fluorescent lights, high-pressure discharge lamps and LEDs placed at buildings and streets or roads used for general lighting purposes. Those attached to cars and those with industrial and machinery use are not included.

◆ Key Findings

- **Lighting fixtures market for general lighting purposes in FY2011 is expected to attain 801.3 billion yen, 106.7% of that of FY2010**

The revision of the Energy Saving Act caused transition of lighting sources from conventional lighting equipments to highly efficient lightings such as LEDs at offices, factories and various commercial facilities. Boosted by LED market, the entire lighting fixtures market in FY2010 marked 751.0 billion yen, 103.9% of the previous FY2009. There expected to be more switching of lighting sources to LEDs in FY2011, this time at general households, influenced by the aftermath of the Great East Japan Earthquake stemmed from growing demands for electricity saving. The entire lighting fixtures market in FY 2011 is estimated to reach 801.3 billion yen, 106.7% of that of the previous FY2010.

- **LED market for FY 2011 is estimated to rise to 185.7% to mark 139.3 billion yen**

In 2009 and onward, LEDs have suddenly drawn attention due to a spate of LED bulbs sold by lighting fixtures manufacturers and other new market players. In addition to the revision of the Energy Saving Act, electricity-saving demands caused by the Great East Japan Earthquake cast additional spotlight on LEDs. There are now ample variety of LED products such as LEDs with straight tube type, LEDs for ceiling, and for main lighting and

etc. The size of LED market for FY 2010 reached 75.0 billion yen, 200.5% of the prior FY2009, the growth of which is estimated to continue also in FY2011 to reach 139.3 billion yen, which would be 185.7 % of FY2010.

■ **Steady growth in performance of manufacturers that shifted to LEDs**

With rapid spreading of LEDs, many lighting fixtures manufacturers have shifted their main business to LEDs. There have been some performance gaps among manufacturers from 2010 to 2011, depending on how far the business shift to LED has completed. However, no matter how the market is likely to boom for the time being, the domestic demand for LEDs is anticipated to shrink in the future. Shift of business to LEDs triggered those companies to consider maintaining and even expanding LED business by diversifying the application of LEDs, entering into overseas markets, and selling LEDs not only as completed products but also as devices to be developed.

◆ **Report format**

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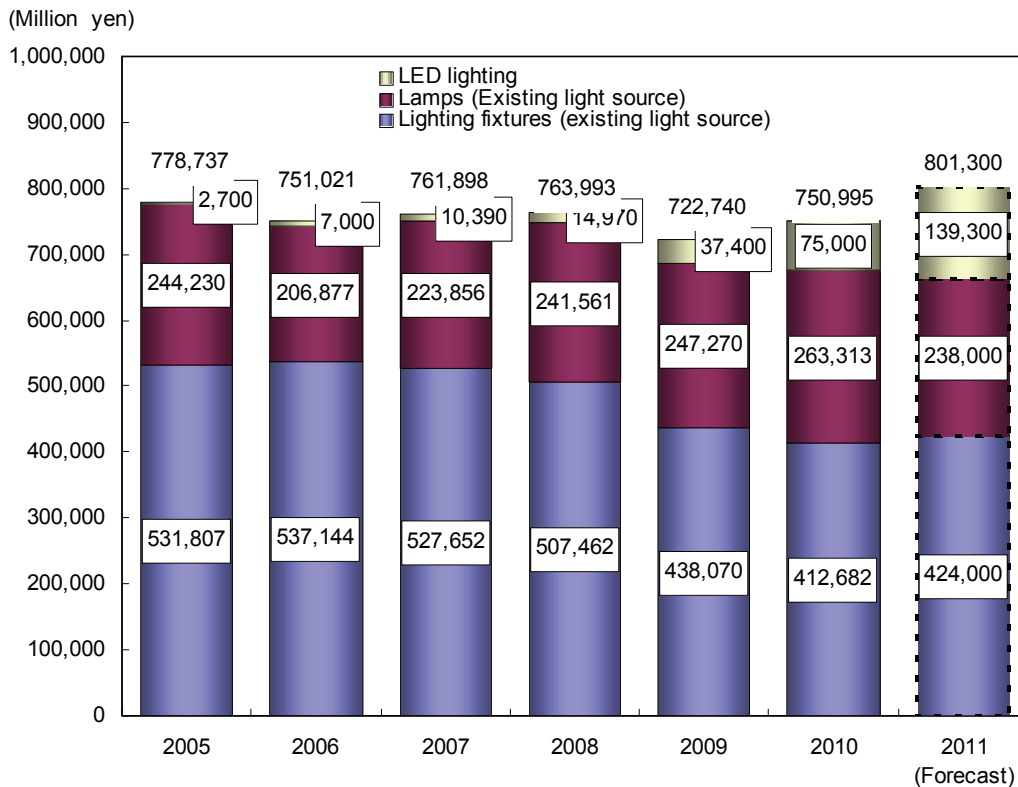
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Format: 572 pages in A4 format

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■ **Figure 1: Transition and Forecast on Size of Entire Lighting Fixtures Market**

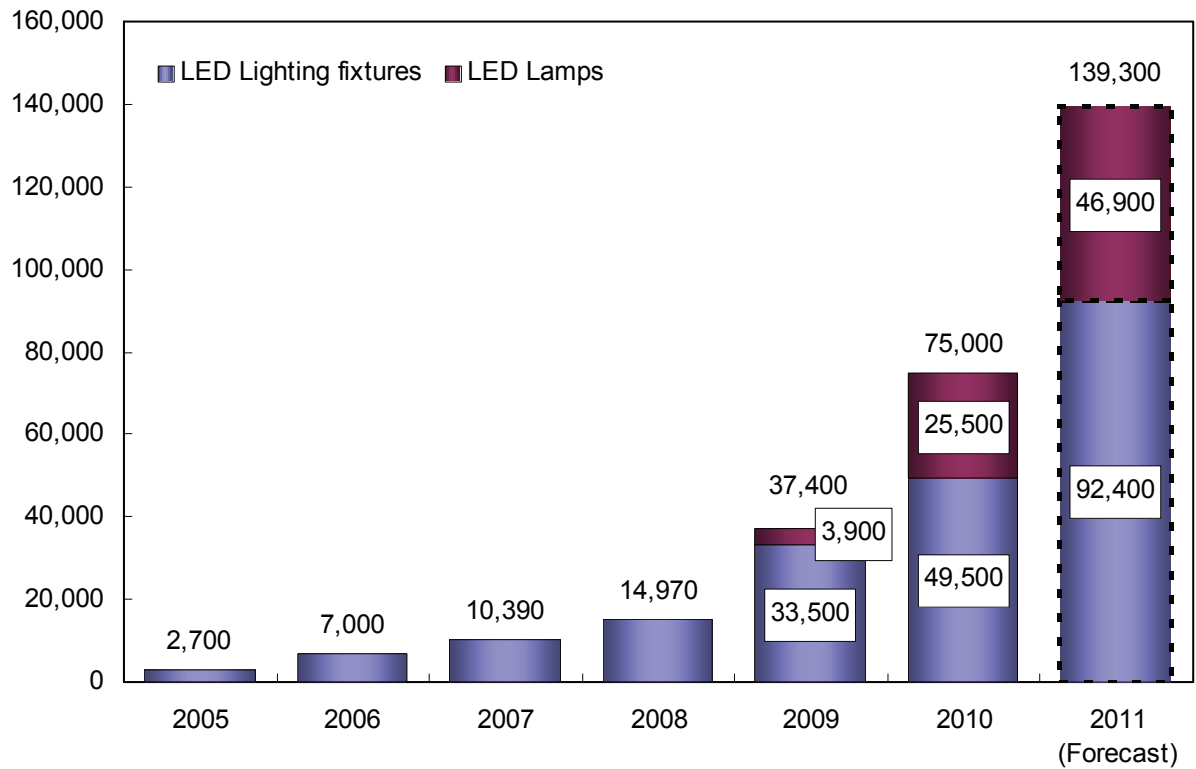


Notes:

1. The figures are based on shipment values of manufacturers
2. The Entire Lighting Fixtures Market indicates the market of Lighting fixtures (existing light source), Lamps (Existing light source), and LED lighting that are used for general lighting purposes.

■ **Figure 2: Transition and Forecast on Size of LED Lighting Fixtures Market**

(Million yen)



NOTES:

3. The figures are based on shipment values of manufacturers
4. The Entire Lighting Fixtures Market indicates the market of Lighting fixtures (existing light source), Lamps (Existing light source), and LED lighting that are used for general lighting purposes.