



CELMA

*Federation of National Manufacturers Association for
Luminaires and Electrotechnical Components for
Luminaires in the European Union*



Joint CELMA / ELC LED Forum Light + Building Fair 14 April 2010

Introduction

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European Lighting Industry?

CELMA (luminaires & components)

- 19 Associations in 13 countries
- > 1000 Small & Medium sized Enterprises
- > 100.000 employees in EU
- € 15 billion annual turnover



www.celma.org



ELC (lamps)

- 8 member companies
- > 50.000 employees in EU
- € 5 billion annual turnover



www.elcfed.org





Objectives European Lighting Industry

To increase the market opportunities for CELMA & ELC members for quality LED lighting products and systems by:

- Speeding up and increasing the adoption of LED products and luminaires
- Driving standards & future certification, in favour of quality solutions
- Educating the market



Growing Market Importance

■ LED lighting 2010: becoming a mature player

(Source: Strategies Unlimited)

- LED market growth: from \$5.1 billion (2008) to \$14.9 billion in 2013
- Compound annual growth rate of 24.0%
- Market growth LED lighting increasing to 40-50% after economic recovery
- LED lighting 2nd largest LED application (after backlights) by 2013

■ LED lighting portfolio (General Lighting) split in 3 groups:

- LED luminaires
- LED modules (or LED Light Engines)
- LED lamps (also called "Retrofit" lamps)



LED market forecasts for Lighting by application

Application (US\$ m)	2008	2009 F	2010F	2011F	2012F	2013 F	CAGR
Replacement Lamps	31	45	99	270	657	1.150	106%
Architectural	203	222	274	328	455	618	25%
Commercial/Industrial	77	89	114	149	184	232	25%
Outdoor	8	37	63	110	155	221	95%
Retail Display	29	36	50	86	135	180	44%
Residential	3	9	20	36	83	99	100%
Other	173	163	201	245	305	348	15%
Total	524	601	821	1.224	1.974	2.848	40%
growth y-o-y		15%	37%	49%	61%	44%	

Source: Strategies Unlimited

- Penetration is determined by cost reduction roadmap
- Huge potential for LED retrofit lamps due to the lamp market size



The European Lighting Industry welcomes the arrival of EU Regulations on EcoDesign

- LED technology continues to improve: major contribution in achieving EU "20/20/20" energy savings objectives
- Market for LED lighting growing fast: (minimum) product requirements have to be set (including "Quality aspects")
- "Phasing out" of energy inefficient lighting products
- **Future new EcoDesign Regulation on directional household lamps expected to support LED lighting products** (performance and quality aspects)



The European Lighting Industry would welcome very much the arrival of a new EU wide Lighting System Legislation (LSL) to improve light quality as well as the energy efficiency of the lighting installation

- EcoDesign Regulations are about energy efficiency of PRODUCTS placed on the market
- LSL is about energy saving with SYSTEMS put into service
- LSL will challenge existing inefficient lighting installations
- **LSL will triple the benefits of EcoDesign Regulations!**



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**Thank you very much
for your kind attention
and enjoy the Forum!**

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