

Lighting & Electricals



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China manufacturer profiles

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Product & price trends

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LIGHTING & ELECTRICALS

Supplier capability in China

EXECUTIVE SUMMARY

China's lighting and electricals industry has an optimistic outlook for 2010. Despite the lingering effects of the economic slowdown and existing anti-dumping restrictions, suppliers are generally looking forward to stronger demand in coming months.

For exports, many are forecasting growth of at least 10 percent. Companies expect orders to pick up steadily as the economic recovery becomes more stable and widespread. Environmental awareness is also projected to continue rising worldwide, encouraging consumption of energy-efficient technologies.

Customs statistics provide basis for the industry's positive outlook. Although the volume of exports between January and October 2009 was down 21 percent from the same period in 2008, the number of products shipped in October grew 11 percent.

CFL shipments show the strongest promise of bouncing back quickly to precrisis levels, as legislation banning incandescent bulbs fuel demand. In fact, export data for September and October 2009 show export volume up 13 and 14 percent, respectively.

LED lighting is considered another high-growth segment. Demand for the line is expected to increase at a fast pace as advancements in related technologies push down costs and, subsequently, prices.

The following are some of the other key trends we see in China's lighting and electricals industry.

- The product selection will become "greener." Across all categories, suppliers are aiming for greater energy efficiency, driven mainly by the implementation of stricter environmental standards in various markets. Many are also switching to materials and components safer for the ecology, as well as human health, to lower the carbon footprint of their models.

- The EU and the US are expected

to remain major destinations of China-made lighting and electricals in coming months. Market conditions in these areas are considered favorable for the industry since both have enacted several pieces of legislation promoting the use of eco-friendly lines.

- To support product development and sales targets, allocations for R&D are being raised. Most makers are also enhancing their capability by hiring additional specialists or engaging in partnerships with academic and research institutions.

- As suppliers jockey for better positions in their chosen markets, price competition is expected to intensify. In light of this, most intend to keep quotes at current levels in coming months.

The report covers the major products of China's lighting and electricals industry, namely light bulbs and tubes, indoor and outdoor lamps, and electrical fixtures and supplies.

The categories are discussed in separate sections. For each line, details about the different types offered, their common features and price determinants are provided.

The latest trends in design and materials are also discussed. Information on the supplier base and key hubs can likewise be found.

The Industry Overview elaborates on issues affecting production and exports. It also identifies the common strategies manufacturers are employing to cope with challenges and enhance overall competitiveness.

To reflect the industry structure, the majority of suppliers featured in this report are local, privately owned enterprises. The rest consists of state-, Hong Kong-, Taiwan- and foreign-invested businesses.

Over three-fourths of the companies are based in Guangdong and Zhejiang. These provinces account for more than 65 percent of China's export sales in lighting and electricals.

In this report

- 61 in-depth company profiles
- 26 additional suppliers
- 279 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

CONTENTS

INDUSTRY OVERVIEW	7
Supplier summary	
Main production centers	
Supplier demographics	
Export statistics	
Light bulbs & tubes	11
Indoor lighting	13
Outdoor lighting	14
Electrical fixtures & supplies	16
Supplier survey	20
Export prices, export sales, target markets, capital expenditure, challenges, capability, R&D focus	
SUPPLIER PROFILES	23
Supplier locations	
Industry composition	
Top 20 exporters	
Supplier matrix	
Production checklist	
Supplier profiles	
PRODUCT GALLERY	157
Top-selling export products	
ADDITIONAL SUPPLIERS	207
Key products, contact details	

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Published by Publishers Representatives Limited (on behalf of Trade Media Limited)
4th Floor, Century Yard, Cricket Square, Elgin Avenue, P.O. Box 32322 SMB, George Town, Grand Cayman, Cayman Islands
c/o 22/F Vita Tower, 29 Wong Chuk Hang Road, Aberdeen, Hong Kong

ISBN 978-988-18627-3-0

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INDUSTRY OVERVIEW

China's lighting and electricals industry is looking forward to a better year. While effects of the economic crisis still linger, suppliers are optimistic of demand gaining momentum in the months ahead.

This positive outlook stems largely from signs of key markets recovering. Environmental awareness also continues to grow, encouraging the purchase of more energy-efficient solutions.

Exports in the past few months provide basis for makers' confidence. Between January and October 2009, the volume of overseas shipments did plummet 21 percent year on year to 28.8 billion units. The number of products sent in October, however, jumped 11 percent to exceed 3 billion.

Still, revenue was well below 2008 levels, as many companies implemented price cuts or shifted their sales mix to less-expensive designs. Average per-unit value was down 29 percent in October, leading sales to decline 21 percent to \$1.5 billion, despite the higher volume. Proceeds for the whole 10-month period

amounted to \$13.7 billion, lower by 23 percent year on year.

In coming months, many suppliers are anticipating an increase of at least 10 percent in export sales. Continuing the trend identified 12 months ago, innovative "green" products are seen to be the primary drivers of revenue.

Heeding this, makers are coming out with models that can provide greater energy and cost savings to accelerate projected growth. More styles are also being offered to better suit certain applications and personal tastes.

In support of this effort, allocations for market studies and product development are being increased. Further, several manufacturers are strengthening in-house R&D capability by hiring more electrical engineers and other specialists. A number are also working with academic and research institutions such as Tsinghua and Fudan Universities, the Beijing Lighting Research Institute and the Research Institute of Electric Light Source Materials of Nanjing University of Technology.

Supplier summary

Suppliers surveyed	61
Export sales	\$1,241.6mn
Export ratio	80%
OEM business	46%
Capacity utilized	76%
Annual R&D spending	\$159.4mn
Full-time employees	68,148

Data: All surveyed suppliers

CFL production accelerating

CFLs are among the segments seen as having high growth potential this year. Uptake is expected to rise as the phase out of incandescent lamps fuels consumption in several industrialized economies. A number of countries have also adopted demand side management programs promoting use of the line.

In the 10-month period ending October, CFLs showed the least sign of a slowdown among the lighting and electrical categories featured in this report. Export volume slid only 6 percent, while value fell 9 percent from the same period in 2008. In September and October 2009, volume was up 13 and 14 percent, respectively, while revenue had risen 7 and 5 percent.

Nonetheless, competing in the segment is not without challenges. Among these is the existence of anti-dumping tariffs that curtail sales in certain markets, including Thailand, India, Indonesia, Egypt and Vietnam.

To minimize the effect of the duties on overall revenue and profits, manufacturers are moving their sales mix toward high-value designs that are not only energy-efficient but also made of materials safe for human and environmental health.

Such releases are targeted at achieving greater sales in the EU, where demand has surged after the duty there was lifted. Another factor making market conditions in the euro zone highly favorable is the ban that has been implemented on general-purpose, nondirectional incandescent bulbs.

The EU is currently the top

Major customers

Company	
CZ	Total Light (Brazil)
DEL	Kalux (Poland)
Emotion	Calex (the Netherlands)
Gather Sun	Westinghouse (US); Tesco (UK); Aldi, Metro (Germany); Auchan (France); Kingfisher (Turkey); Rusta (Sweden)
Heshan City Wanshun	Hashim Al Rubal (Dubai)
Luen Yick	BG (UK), Crompton (Australia)
Ningbo Utec	Adeo Group (France), Konstsmide (Sweden), Crompton (Australia), Kingfisher (Hong Kong), K-Light (Taiwan)
Ningbo Yixincheng	Target, Wal-Mart (US); OBI (Germany)
Quanzhou Yilong	QVC (US), Auchan (France)
Quasar	Philips (the Netherlands), Otis (US)
Shenzhen Kinglight	Philips (the Netherlands), Osram (Germany)
Xiamen Topstar	GE (worldwide)
Yuyao Four Star	Kichler (US); RZB, Steinel (Germany); Leds-C4 (Spain)

Data: All surveyed suppliers

Best Electronic Technology Co. Ltd

Best's selection of lighting and electricals includes bulbs, luminaires, dimmers and controllers. With total sales amounting to \$4.2 million, these products accounted for 60 percent of the company's total sales in 2009.

An average of 30,000 units was exported each month, primarily to the EU. North America, Eastern Europe, the Asia-Pacific region and the Middle East were also key destinations.

Models bearing the in-house brand accounted for over 90 percent of shipments. OEM orders constituted 5 percent and products under ODM

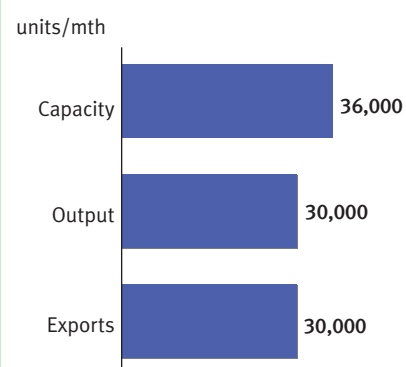
contracts made up the rest.

Best can manufacture 36,000 units of various lighting and electricals monthly. Its 2,000sqm factory in Guangzhou, Guangdong province, is equipped with facilities for mold making, PCB assembly and glass envelope production. The plant also houses aging lines and instruments for testing luminous flux, lumens depreciation and EMC.

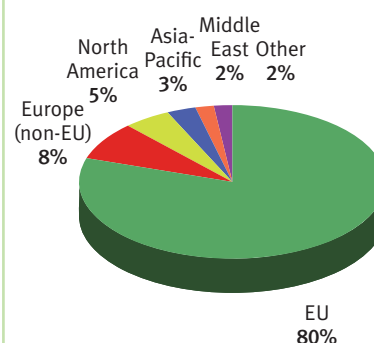
The company has 90 full-time employees. The workforce includes 10 R&D specialists and five QC inspectors.

Profile

Production



Export markets



Contact details

Business contact

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2-6 Hongde Road, Haizhu, Guangzhou,
Guangdong, China

Company facts

Year established	2005
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Guangzhou (Guangdong)
Number of factories	1
Factory location(s)	Guangzhou (Guangdong)
Total factory area	2,000sqm
No. of full-time employees	90
No. of R&D/design staff	10
No. of QC staff	5
Annual sales (all products)	\$7.0mn
Annual R&D spending	\$210,000
ISO certification	Pending

Sales & output: Lighting & electricals

Annual sales	\$4.2mn
Share of total sales	60%
Annual export sales	\$4.2mn
Total monthly capacity	36,000 units
Average monthly output	30,000 units
Capacity utilized	83%
Average monthly exports	30,000 units
Export ratio	100%
OEM % of exports	5%
ODM % of exports	2%
OBM % of exports	93%
Other products made	Mobile phone accessories

Capability

Production checklist

Makes molds in-house	Yes
In-house PCB assembly	Yes
In-house glass envelope production	Yes
In-house LED chip packaging	No
Automated painting lines	No
Plastic-injection machines	2
Aging lines	2
Lumens depreciation test	Yes
Luminous flux testers	1
EMC testers	1

Exports by product

Light bulbs & tubes	65%
Indoor lighting	31%
Outdoor lighting	2%
Electrical fixtures & supplies	2%

Exports by market

North America	5%
European Union	80%
Europe (non-EU)	8%
Asia-Pacific	3%
Middle East	2%
Other	2%

Survey

- **Export prices**
Decreased
- **Export price decrease**
Less than 5%
- **Export sales**
Increase more than 20%
- **Target market**
European Union
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Price competition
- **Export capability**
Widen product range
- **R&D focus**
Greater energy efficiency

Popular export models



Light bulb

Model	BST-B18
MOQ	1 unit
Packaging	White box
Delivery	7 days
Price	\$8.70

Description: LED bulb; 54 diodes, 50,000hr service life; 3.6W; 85 to 265VAC, 50 to 60Hz; 250 to 280 lumens; 2,500 to 6,000K, cool or warm white; 360-degree beam angle; glass cover; E14, E26 or E27 base; 60x120mm



Light bulb

Model	BST-G60BL3W-PA01-D
MOQ	1 unit
Packaging	White box
Delivery	7 days
Price	\$14.30

Description: LED bulb; three diodes, 50,000hr service life; dimmable from 20 to 100 percent using triac dimmers; 0.5 to 4W; 110/220VAC, 50 to 60Hz; 2,500 to 6,000K, cool or warm white; aluminum and glass housing; E27 or GU10 base; 60x111mm; CE, ROHS



Light bulb

Model	BST-G60BG3W-PA01
MOQ	1 unit
Packaging	White box
Delivery	7 days
Price	\$10.50

Description: LED bulb; three diodes, 50,000hr service life; 3.9W; 85 to 265VAC, 50 to 60Hz; 190 to 195 lumens; 2,500 to 6,000K, cool or warm white; 180-degree beam angle; Bridgelux chip; aluminum alloy and glass housing; E11, E14, E17, E26, E27 or B22 base; 60x115mm; CE, RoHS

PRODUCT GALLERY

Light bulbs & tubes



Best
(profile page 32)
Model: BST-B18
MOQ: 1 unit
Packaging: White box
Delivery: 7 days
Price: \$8.70
Description: LED bulb; 54 diodes, 50,000hr service life; 3.6W; 85 to 265VAC, 50 to 60Hz; 250 to 280 lumens; 2,500 to 6,000K, cool or warm white; 360-degree beam angle; glass cover; E14, E26 or E27 base; 60x120mm



Best
(profile page 32)
Model: BST-G60BG3W-PA01
MOQ: 1 unit
Packaging: White box
Delivery: 7 days
Price: \$10.50
Description: LED bulb; three diodes, 50,000hr service life; 3.9W; 85 to 265VAC, 50 to 60Hz; 190 to 195 lumens; 2,500 to 6,000K, cool or warm white; 180-degree beam angle; Bridgelux chip; aluminum alloy and glass housing; E11, E14, E17, E26, E27 or B22 base; 60x115mm; CE, RoHS



Best
(profile page 32)
Model: BST-G60BL3W-PA01-D
MOQ: 1 unit
Packaging: White box
Delivery: 7 days
Price: \$14.30
Description: LED bulb; three diodes, 50,000hr service life; dimmable from 20 to 100 percent using triac dimmers; 0.5 to 4W; 110/220VAC, 50 to 60Hz; 2,500 to 6,000K, cool or warm white; aluminum and glass housing; E27 or GU10 base; 60x111mm; CE, ROHS



Best
(profile page 32)
Model: BST216DIP12W120M
MOQ: 1 unit
Packaging: White box
Delivery: 7 days
Price: \$27.00
Description: T8 LED tube; 216 DIP diodes; 12W; 85 to 265VAC, 50 to 60Hz; 1,250 to 1,490 lumens; 2,700 to 3200K warm white, 6,000 to 6,500K pure white; ≥ 0.95 power factor; aluminum and PC housing; G13 base; 26mm diameter; 1,200mm length; CE, RoHS



Best
(profile page 32)
Model: BST-G60BL5W-PA01
MOQ: 1 unit
Packaging: White box
Delivery: 7 days
Price: \$13.55
Description: LED bulb; five diodes, 50,000hr service life; 7W; 85 to 265VAC, 50 to 60Hz; 300 to 350 lumens; 2,500 to 6,000K, cool or warm white; 180-degree beam angle; aluminum and PC housing; E271 base; 60x111mm



CNLight
(profile page 36)
Model: PLL-24W
MOQ: 4,000 units
Packaging: Buyer-specified
Delivery: 30 days
Price: •
Description: Single-H CFL; 18, 24, 36, 40 or 55W; 2,700 to 6,500K; >80 Ra; 220 or 240V; 10,000hr service life; 2G11 base

• Information not disclosed

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