

# Lighting & Electrical



March 2009      US\$395

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# LIGHTING & ELECTRICAL

## *Supplier capability in China*

### EXECUTIVE SUMMARY

China's lighting and electrical industry in coming months will be "green," as suppliers remain focused on categories that promote energy efficiency. The move comes amid the growing call for increased environmental awareness, which has resulted in the enactment of legislation, both domestically and overseas, favoring renewable energy and power-saving devices.

In this regard, China revitalized the local solar panels industry over the past several months, encouraged by the growing availability of PV cells and advancements in amorphous or thin-film technology.

This is supported by customs statistics, which show exports of solar modules in January to November 2008 overtaking electrical fixtures and indoor lighting to become the period's top revenue driver.

Shipments of PV panels, counted with solar cells, photosensitive semiconductor devices and LEDs, surged 143 percent to exceed \$11 billion, accounting for more than one-third of sales.

China companies will also boost output of compact fluorescent lamps and LED bulbs to prepare for the anticipated increase in demand as markets start phasing out incandescent lamps.

CFL makers are therefore prioritizing RoHS compliance to address concerns over their products' mercury content, particularly since the EU has lifted its anti-dumping policy on the line.

Suppliers of LED bulbs are using developments that have yielded high-power diodes to strengthen their foothold in the residential lighting segment.

Companies are concentrating on these high-growth lines amid the financial slump to strengthen China's status as the primary manufacturing hub for lighting and electrical. Exact figures are difficult to obtain, but

annual output has been placed at 50 percent of global supply.

The following are some of the key trends we see in China's lighting and electrical export industry:

- Driven by the popularity of environment-friendly products, the sector will continue to fare better than others. Export volume between July and November 2008 fell 2 percent YoY, around the time when China started to feel the impact of the economic crisis. The fact that shipments remained on the growth track, however, is notable considering that many industries registered a decrease in exports during the period.

- High prices, which propelled export sales to jump 42 percent last year and exceed \$30 billion, will be adjusted downward in coming months. Many suppliers are anticipating reductions of at least 5 percent. Some are more optimistic with their projections, confident that they can bring quotes down by as much as 15 percent.

- Consequently, makers are preparing for price competition by enhancing manufacturing capability, specifically efficiency.

- Product development efforts in the months ahead will continue to be geared toward energy-saving devices. Companies will also address performance-related issues by improving durability and extending service life.

This report covers light bulbs and tubes, indoor and outdoor lamps, electrical fixtures and supplies, and solar panels. They are described separately in terms of construction and key features and specifications.

The Industry Overview elaborates on issues affecting production and exports and how companies are coping with these challenges. To reflect the industry structure, most of the suppliers in this report are China-owned with direct exporting capability.

### In this report

- 37 in-depth company profiles
- 25 additional suppliers
- 135 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 each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, 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 capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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## INDUSTRY OVERVIEW

Even though the financial crisis affected exports in the last quarter of 2008, China's lighting and electrical industry continues to perform strongly.

Based on customs statistics, sales in the 11 months to November exceeded \$30 billion, representing a 42 percent jump over the same period in 2007.

Further, revenue between July and November 2008 rose 34 percent YoY. This was around the time when China started to feel the impact of the economic slowdown.

Volume, on the other hand, fell 2 percent. Total shipments for 2008, however, went up 2 percent. In comparison, other export sectors reeled from sizable reductions in orders, particularly from the key markets of North America and the EU.

The continuous growth of the lighting and electrical industry is largely because of the rising popularity of energy-efficient fixtures, especially in the residential lighting market. In fact, only a few segments pertaining to decorative and high-end lamps have noted a decrease in demand in past months.

Heightened ecological awareness and efforts to lower power consumption have spurred demand for compact fluorescent lamps, LED bulbs and solar panels, of which China is a leading manufacturer.

For CFLs alone, the country makes approximately 2.5 billion units every year, accounting for 80 percent of output worldwide.

LED bulb turnout is more impressive and has, in fact, overtaken CFLs.

According to a report released by the China Solid State Lighting Alliance, output in the line now reaches 12 billion units annually.

PV panel manufacture in 2008, meanwhile, exceeded 2,000MW, up 17 percent from the year before.

In the months ahead, production of these key categories and other

similarly energy-efficient lines will increase further, spurred by a spate of environment-protection measures.

Several countries, including Australia, the US, Canada and some in the EU, have already started phasing out incandescent bulbs in favor of CFLs and LED lamps.

The latter, in particular, are getting a boost over CFLs, which, although lasting longer and consuming less power than incandescents, pose a potential health hazard.

CFLs contain small amounts of mercury that vaporize when breakage occurs, prompting some areas in the US to require that the bulbs be disposed of as household hazardous waste.

In fact, the challenge of compliance with safety standards is topping suppliers' list of priorities.

Conformance with the RoHS, the EU's directive on harmful substances,

### Supplier summary

Suppliers surveyed	37
Export sales	\$408.7mn
Export ratio	69%
OEM business	57%
Capacity utilized	69%
Annual R&D spending	\$59.0mn
Full-time employees	21,047

Data: All surveyed suppliers

for example, has grown in importance since the lifting of the anti-dumping policy against CFLs from China.

As such, most midsize and large companies have established workshops specifically for the manufacture of RoHS-compliant models. Small makers have independent production lines for this task.

Further, many suppliers have built in-house testing facilities to ensure CFLs meet RoHS and other international standards such as UL, CE, Energy Star and SASO.

### Major customers

Company	
CNLight	Philips (Netherlands); Osram (Germany); GE (US)
DEL	Kalux (Poland)
Eleko	Philips (Netherlands); Osram (Germany)
Forever	JOM (Germany)
Heshan Mingkeda	Wal-Mart (US); B&Q (UK); Carrefour (France)
Huang's	Extrastar S.L. (Spain)
Ninghai Guanghui	Beghelli (Italy); Pierlite (Australia)
Quasar	Philips (Netherlands); Otis, Coca-Cola (US); SLV (Sweden)
RightLEDs	Apil Neon (Spain); Beflex (Hungary)
Rishang	GE, McDonald's (US); Carrefour (France); Toyota (Japan)
Shanghai Wellmax	Walgreens (US); PMS (UK)
Shenzhen Pure	MJ Trading (South Korea)
Shenzhen Sinoco	Paulmann, Osram (Germany); Isolar (South Korea); InterLine (US); Kendal (Turkey)
Shenzhen Topray	Cosco, Harbourfreight Tools (US), Carrefour (France), Canadian Tire (Canada), K-mart (Australia)
Vertex	B&Q, Wicks (UK)
Xiamen Leedarson	B&Q (UK); Carrefour, Auchan (France)
Zhejiang Shendu	Home Depot (US)

Data: All surveyed suppliers

### CNLight Co. Ltd

ISO-compliant CNLight generates \$50 million in total sales every year, 70 percent of which is from various lighting and electrical products.

North America will continue to be the primary market in the next few months. Products also go to the EU, Eastern Europe, the Asia-Pacific region and the Middle East.

CNLight can manufacture up to 13 million models of light bulbs and tubes, indoor lighting, and electrical fixtures and supplies per month. Its Guangdong province factory turns out 6 million units monthly, utilizing more than 45

percent of total capacity. The plant has a floor area of 12,000sqm.

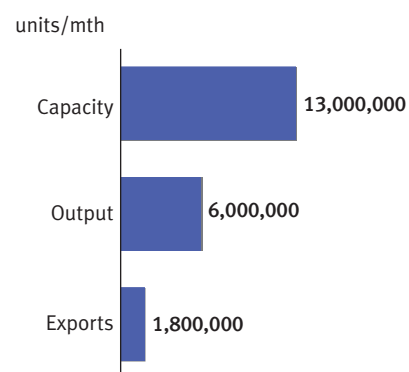
The company is holding capital expenditure at current levels. Exports are expected to increase more than 20 percent in coming months.

The supplier invests 4 percent of revenue in R&D annually, with 95 personnel handling product design and development.

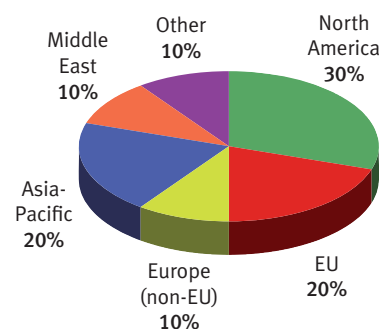
Outbound shipments generated \$15 million last year. OEM orders make up 70 percent of export shipments and ODM business 20 percent. OBM models account for the rest.

#### Profile

##### Production



##### Export markets



##### Contact details

###### Business contact

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Guangdong, China

#### Company facts

Year established	1992
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Foshan (Guangdong)
Number of factories	1
Factory location(s)	Foshan (Guangdong)
Total factory area	120,000sqm
No. of full-time employees	3,000
No. of R&D/design staff	95
No. of QC staff	50
Annual sales (all products)	\$50.0mn
Annual R&D spending	\$2mn
ISO certification	Yes

#### Sales & output: Lighting & electrical

Annual sales	\$35mn
Share of total sales	70%
Annual export sales	\$15.0mn
Total monthly capacity	13,000,000 units
Average monthly output	6,000,000 units
Capacity utilized	46%
Average monthly exports	1,800,000 units
Export ratio	30%
OEM % of exports	70%
ODM % of exports	20%
OBM % of exports	10%
Major customers	Philips (Netherlands); Osram (Germany); GE (US)
Other products made	Flashlights, HID conversion kits, HID xenon conversion kits, industrial air cleaners, industrial water purification systems, UV sterilizers

Capability

Production checklist

Makes molds in-house	No
In-house PCB assembly	Yes
Automated painting line	No
Plastic-injection machines	—
Aging lines	35
Lumens depreciation tests	Yes
Laminators	—
Solar simulators	—
Makes solar cells in-house	—

Exports by product

Light bulbs & tubes	60%
Indoor lighting	30%
Outdoor lighting	—
Solar panels	—
Electrical fixtures & supplies	10%

Exports by market

North America	30%
European Union	20%
Europe (non-EU)	10%
Asia-Pacific	20%
Middle East	10%
Other	10%

Outlook

- **Export prices**  
Decrease
- **Export price decrease**  
Less than 5%
- **Export sales**  
Increase more than 20%
- **Target market**  
North America
- **Capital expenditure**  
No increase
- **Major challenge**  
Price competition
- **Export capability**  
Improve operating efficiency
- **R&D focus**  
Improved durability/  
longer service life

Popular export models



**Description:** Spiral CFL; 11W; 2,700 to 6,500K; E27 base; UL, FCC, Energy Star

Light bulb

Model	ES2-11W(T2)
Minimum order	4,000 units
Packaging type	Color box
Delivery time	40 days
Indicated price	•



**Description:** Metal halide bulb; 35W; 90V; 0.53A; 3,300lm/W; 3,000 to 4,200K; 12,000 hours service life; G8.5 base

Light bulb

Model	JLT-G8.5
Minimum order	500 units
Packaging type	Color box
Delivery time	20 days
Indicated price	\$14.81



**Description:** Table lamp; 110 to 230V at 50 to 60Hz; 13W; 2,700 to 6,400K; shade adjustable to 270 degrees; arm adjustable to 45 degrees; 10,000 hours service life; 127x310x378mm; ABS; in blue, silver, white, with battery

Indoor lighting

Model	HL-A5091
Minimum order	500 units
Packaging type	Color box
Delivery time	10 days
Indicated price	\$10.55

• Information not disclosed

## PRODUCT GALLERY

### Light bulbs & tubes



**CNLight**  
(profile page 42)  
**Model:** ES2-11W(T2)  
**Minimum order:** 4,000 units  
**Packaging type:** Color box  
**Delivery time:** 40 days  
**Indicated price:** •  
**Description:** Spiral CFL; 11W; 2,700 to 6,500K; E27 base; UL, FCC, Energy Star



**CNLight**  
(profile page 42)  
**Model:** JLT-G8.5  
**Minimum order:** 500 units  
**Packaging type:** Color box  
**Delivery time:** 20 days  
**Indicated price:** \$14.81  
**Description:** Metal halide bulb; 35W; 90V; 0.53A; 3,300lm/W; 3,000 to 4,200K; 85/9Rra; 12,000 hours service life; G8.5 base



**CNLight**  
(profile page 42)  
**Model:** PLC-26W  
**Minimum order:** 4,000 units  
**Packaging type:** Color box  
**Delivery time:** 40 days  
**Indicated price:** •  
**Description:** 2U CFL; 26W; 220 to 240V; 1,680 to 1,780 lm/W; 2,700 to 6,500K; 80/82/84 CRI; G24D, GS23-2, G24Q lamp base; 173x162x27mm; CE



**DEL**  
(profile page 44)  
**Model:** DG120B0T8W2G  
**Minimum order:** None  
**Packaging type:** White box  
**Delivery time:** 7 days  
**Indicated price:** \$70.00  
**Description:** LED tube; 116 diodes; 26W; 1,600 lumens; 3,500 to 4,100K (warm white), 6,500 to 7,000K (white); >0.9 power factor; 1,200mm length; 26.3mm diameter



**Eagle**  
(profile page 46)  
**Model:** MR16  
**Minimum order:** 1,000 units  
**Packaging type:** White box  
**Delivery time:** 10 days  
**Indicated price:** •  
**Description:** LED bulb; 3W; warm white, cool white, red, yellow, green, blue; 50,000 hours average service life; optical glass lens; suitable for museums, hotels, supermarkets, cosmetic shops, as cabinet light; CE, RoHS



**Eagle**  
(profile page 46)  
**Model:** E27  
**Minimum order:** 1,000 pieces  
**Packaging type:** White box  
**Delivery time:** 10 days  
**Indicated price:** •  
**Description:** LED bulb; 3W; warm white, cool white, red, yellow, green, blue; 50,000 hours average service life; optical glass lens; suitable for museums, hotels, supermarkets, cosmetic shops; CE, RoHS

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