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# Lighting & Electricals

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February 2011

US\$395

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## Supplier capability in China

**LIGHTING & ELECTRICALS**

China's lighting and electricals industry is positive external demand will continue to strengthen in the months ahead. Many suppliers are forecasting growth of at least 30 percent in export sales this year.

Companies expect orders to increase steadily as the economic recovery takes a firmer hold in the EU and other key destinations. Environmental awareness is also encouraging a shift to newer, more energy-efficient technologies in both developed and emerging markets.

Customs statistics for the 11-month period ending November 2010 reflect the pickup in demand. Aggregate exports of bulbs, lighting fixtures, ballasts and circuit breakers rose 26 percent YoY to surpass 21 billion units, while revenue went up 35 percent to almost \$12.6 billion. The EU, North America and the Asia-Pacific region accounted for more than three-fourths of sales.

**Key findings**

1. LED-based categories will cover a wider range of applications as technological advancements yield more cost-effective alternatives to other lighting solutions. Policies encouraging the establishment of a comprehensive domestic supply chain are expected to accelerate development of the line.
2. Older lamp technologies such as CFLs and halogen bulbs will continue to improve as suppliers boost the competitiveness of these products against LED counterparts. Models with better performance-price ratios are anticipated.
3. The EU, North America and the Asia-Pacific region are expected to remain key markets for China-made lighting and electricals in coming months. Business conditions in these areas are considered favorable since many countries have enacted legislation promoting the use of energy-efficient, higher-value technologies.
4. Suppliers will also continue expanding into the emerging markets of South and Central America, Africa and the Middle East, where economic development is expected to fuel demand. Environmental policies encouraging the use of more efficient lighting solutions have also been put in place in several countries.
5. Prices are forecast to remain relatively stable in the next six months, with many companies intending to keep quotes at current levels as part of efforts to accelerate growth. Suppliers planning to raise prices to cover higher manufacturing outlay and exchange risk will limit adjustments to 10 percent.

**Scope & methodology**

This 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. For each category, details about the different types offered, their common features and price determinants are provided.

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

To reflect the industry structure, the majority of the suppliers featured in this report are local, privately owned enterprises. Hong Kong- and Taiwan-invested businesses are also covered.

More than two-thirds of the companies are based in Guangdong and Zhejiang provinces. The former accounts for nearly

40 percent of mainland China's export sales, while the latter contributes 30 percent.

To produce the report, Global Sources interviewed 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 are verified by Global Sources.

Each supplier is confirmed to be authentic with a legally registered business. All companies are visited three or more times by Global Sources to ensure they are export-ready and have real offices and products.

The listed contact person has been verified to represent the registered company. In each case, companies were required to answer specific questions designed to verify their manufacturing

and export credentials.

All profiled suppliers participated in a survey designed to provide insight into price trends, sales outlook and target markets in the next six months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

**Global Sources supplier rankings**

Suppliers are ranked using a 6-star ranking system. Companies with a higher star ranking provide more business information and verification reports on their Global Sources online homepages.

Suppliers rated 5 or 6 stars have a Credit Check report from First Advantage or Sino-Trust and a Supplier Capability Assessment report provided by Bureau Veritas online.

The rankings are correct at the time of publication and may be subject to change.

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## Industry Overview

China's lighting and electricals industry is gearing up to meet greater demand this year as key markets continue to recover from the 2008 financial crisis. Growing worldwide consumption of environment-friendly products is also encouraging positive projections, particularly in high-value lines.

Exports of light bulbs, luminaires, ballasts and circuit breakers between January and November 2010 affirm the pickup in international market activity. After falling 14 percent in 2009, overseas shipments rose 26 percent YoY to exceed 21 billion units. Revenue surged 35 percent to \$12.6 billion, a significant increase on its own, but even more when contrasted to the 19 percent decline in 2009.

The EU contributed 30 percent to sales, taking in \$3.8 billion worth of products during the period. North America and the Asia-Pacific region were also key destinations, accounting for 26 and 20 percent of sales, respectively.

The three areas are expected to remain major markets in coming months. Suppliers will also continue to expand their customer base in South America and other regions, where several countries are already implementing policies encouraging energy efficiency.

Most suppliers expect revenue from overseas shipments to increase 30 percent or more this year. LED bulbs, CFLs and fixtures compatible with these light sources are anticipated to be the major drivers of growth, with the use of incandescents already being restricted in several countries.

### LED lighting to gain more ground

LED-based categories are considered especially promising. The emphasis on energy conservation is fueling market interest, particularly in developed economies that can afford the line.

Many suppliers are exploring opportunities in indoor illumination, since advances in LED design and production technology are paving the development of cost-effective alternatives to incandescents and other types of bulbs. The latest releases deliver higher performance-price ratios, having better lumen depreciation rates and longer service lives.

Several companies are targeting more specific applications in hotels and other commercial settings. These suppliers expect consumption in the segment to accelerate faster than the residential sector because the former

can better afford the products. LED luminaires are still significantly more expensive, with quotes for certain models reaching six times those of fluorescent types.

Public lighting is another application seen as having strong growth prospects, especially in the domestic market. The line's adoption of LEDs is increasing, encouraged by programs such as the Ten Cities with 10,000 Lights. Under the project, over 3 million LED lamps will be installed in certain areas from 2009 to 2012 to illuminate streets, subways, parks, gas stations and other public areas.

### LED lighting suppliers move upstream

Several LED lighting makers are pursuing backward integration to guard better against shortages and ensure the smooth flow of resources in the supply chain. By securing their manufacturing requirement, they hope to achieve greater control over production outlay and raise further the performance-price ratios of models.

Companies also hope to boost margins as they gear up to survive competition in coming years. In the LED supply chain, packaging and application products account for only 30 percent of profits, while the rest come from epitaxial wafers, chips and other upstream lines. Margins for businesses in the former are expected to become smaller as more enterprises break into lighting and other downstream sectors, which have lower entry barriers. Foreign vendors are forecast to pay greater attention to China as well, with the country's consumption and output both rising thanks to state support.

IPR concerns are another factor driving lighting suppliers upstream. As competition intensifies, many companies believe such issues will come up with increasing frequency,

particularly concerning core technologies.

Currently, fewer than 10 companies own the majority of LED patents worldwide, among them Cree of the US, Nichia and Toyoda Gosei of Japan, Germany's Osram, Philips of the Netherlands and South Korea's Seoul Semiconductor. Many exclusive rights are scheduled to expire in 2016, but lighting makers are anticipating holders will try to extend the validity period.

This business environment already constrains LED lighting makers from boosting exports to Japan and other key overseas markets, and may pose an even bigger challenge in coming years.

China's state and local governments have put in place several policies to support the establishment of a comprehensive domestic supply chain for LED lighting. These schemes are making it easier for manufacturers to invest in core technologies and establish vertically integrated operations.

Yangzhou in Jiangsu province and several other cities, for instance, offer subsidies for the purchase of MOCVD equipment.

## Best Wisdom (Shenzhen) Industrial Ltd



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Established in 2003, Best Wisdom generated \$2 million or 20 percent of its annual revenue from lighting products last year. Exports accounted for 75 percent of sales in the line.

Monthly shipments averaged 12,000 units. Light bulbs and tubes constituted 50 percent of deliveries, while indoor and outdoor illumination made up the rest.

Forty percent of the products sent abroad went to North America. The company also catered to clients in the EU, non-EU nations, the Asia-Pacific region, the Middle East, and South and Central America.

The supplier's manufacturing operations are based in Guangdong province. It has a 500-strong workforce, which includes a team for R&D.

### Company facts

Year established	2003
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Factory location(s)	Shenzhen (Guangdong)
No. of full-time employees	500
Annual sales (all products)	\$10.0mn
Annual R&D spending	\$100,000

### Sales & output: Lighting & electricals

Annual sales	\$2.0mn
Share of total sales	20%
Annual export sales	\$1.5mn
Total monthly capacity	20,000 units
Average monthly output	15,000 units
Capacity utilized	75%
Average monthly exports	12,000 units
Export ratio	80%

### Contact details

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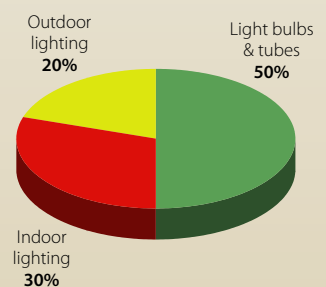
**Model:** BW- BU-AC220W-4

**MOQ:** 100 units

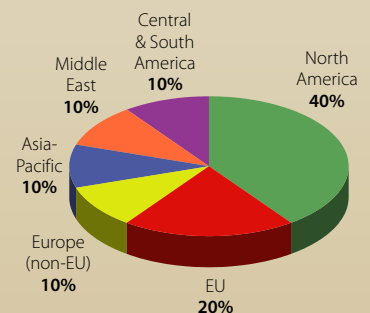
**Description:** LED bulb; 4W; 90, 110/220 or 264V operating voltage; 6,000±200K color temperature; -25 to 60 C operating temperature; 50,000hr service life; 60mm diameter; 108mm height

See more popular export models in the Product Gallery.

### Exports by product



### Exports by market



## PRODUCT GALLERY

### Light bulbs & tubes



**Best Wisdom**

(profile page 27)

**Model:** BW- BU-AC220W-4

**MOQ:** 100 units

**Description:** LED bulb; 4W; 90, 110/220 or 264V operating voltage; 6,000±200K color temperature; -25 to 60 C operating temperature; 50,000hr service life; 60mm diameter; 108mm height



**Best Wisdom**

(profile page 27)

**Model:** BW- T5-AC220W-144/288A

**MOQ:** 100 units

**Description:** LED tube; 144 or 288 3020 type diodes; optical-grade PC cover, frosted finish; aluminum heatsink; 7 or 14W; pure, natural or warm white; 120-degree beam angle; -20 to 55 C operating temperature; ≤90% humidity; >50,000hr service life



**Chenyang**

(profile page 29)

**Model:** E27 3\*3W

**MOQ:** 10 units

**Description:** LED spotlight bulb, Edison or Cree diodes; 8.5W; 100 to 240VAC input voltage; 340 or 380 lumens; pure, warm or cool white; -40 to 60 C operating temperature; 120g



**Chenyang**

(profile page 29)

**Model:** CY-T8/22W

**MOQ:** 20 units

**Description:** LED tube; 336 diodes; PC and aluminum; 85 to 265VAC input voltage; -20 to 50 C operating temperature; 26mm diameter; 1,200 length



**Chongming**

(profile page 30)

**Model:** CM-SL-4W

**MOQ:** 100 units

**Description:** LED spotlight bulb; four 1W diodes; 4W; 85 to 264VAC or 12VDC input voltage; 3,000 to 7,000K color temperature; 30 to 120-degree beam angle; -20 to 60 C operating temperature; 30,000hr service life; 50mm diameter



**CNLight**

(profile page 31)

**Model:** ES4-23W

**MOQ:** 3,000 units

**Description:** Spiral CFL; 15, 18, 20 or 23W; 120, 127 or 220V; 2,700 to 6,500K; E26, E27, B22 or GU24 base; 8,000 to 10,000hr service life; CE, Energy Star, RoHS, UL

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