

# EnergyWatch



March 2011

<http://www.attardimarketing.com/energywatch/>  
[www.energywatchblog.com](http://www.energywatchblog.com)

## Abraham Lincoln:

- *You cannot help the poor by destroying the rich.*
- *You cannot strengthen the weak by weakening the strong.*
- *You cannot bring about prosperity by discouraging thrift.*
- *You cannot lift the wage earner up by pulling the wage payer down.*
- *You cannot further the brotherhood of man by inciting class hatred.*
- *You cannot build character and courage by taking away people's initiative and independence.*
- *You cannot help people permanently by doing for them, what they could and should do for themselves.*



## Something to Think About...

### The end of John F. Kennedy's Inaugural Address, Friday, January 20, 1961

In the long history of the world, only a few generations have been granted the role of defending freedom in its hour of maximum danger. I do not shrink from this responsibility—I welcome it. I do not believe that any of us would exchange places with any other people or any other generation. The energy, the faith, the devotion which we bring to this endeavor will light our country and all who serve it—and the glow from that fire can truly light the world.

And so, my fellow Americans: ask not what your country can do for you—ask what you can do for your country.

My fellow citizens of the world: ask not what America will do for you, but what together we can do for the freedom of man.

Finally, whether you are citizens of America or citizens of the world, ask of us the same high standards of strength and sacrifice which we ask of you. With a good conscience our only sure reward, with history the final judge of our deeds, let us go forth to lead the land we love, asking His blessing and His help, but knowing that here on earth God's work must truly be our own.



**SPECIAL TRAINING SESSION:**

**Attardi Marketing is offering a behavior changing training session for sales professionals at Monmouth University, West Long Branch, NJ:**



**Monday, May 16, 2011**

***Sales Pro Solution Selling***

**An important asset of any company, especially one involved in the distribution of products and services, is its sales force and its ability to solve problems in today's increasingly diverse and global workplace. The current business environment is changing the makeup of both the workplace and, most certainly, your customer base.**

**This one-day advanced sales training workshop focuses on assessing the individual strengths and weaknesses we all have and the sales skills necessary to recognize and to solve those nagging problems that are impediments to successful sales closure.**

**Using a highly successful self-assessment instrument (DISC Model) online, the workshop provides the attendees an understanding of different behavioral styles essential for managing and selling more effectively in a diverse environment. In addition, the objective of the workshop is to develop the necessary sales skills to successfully upsell into a rapidly changing electrical industry with emphasis on the new energy efficient technologies and process selling. To convince today's customers to upgrade to the more technologically advanced products because of bottom line improvement and productivity gains that will be realized. The workshop engages and challenges participants through self-assessments, brief lecturettes, questionnaires, customized case studies and interactive group exercises.**

**Before the session, all participants will be asked to complete an online assessment:**

**The Success Insights® DISC Profile Behavioral Assessment – an analysis of each individual's behavioral style is used to increase your self-awareness and abilities to develop adaptive styles to meet the demands of your work and customer environments. Here's what you get:**

- You get to take a 15 minute online assessment that will reveal your personal behavioral style
- Your Personal Success Insights® DISC Profile Behavioral report
- Expert analysis
- Complete binder to continue the learning process on your own
- Continental breakfast and break refreshments and lunch
- Professional Adjunct Professors: Bill Attardi and Mike Protono

**Your cost: \$350.00 per attendee. The complete one-day agenda and registration available at:**

**[www.attardimarketing.com/salesprosolutionselling](http://www.attardimarketing.com/salesprosolutionselling)**

**.....or send me an email at [wattardi@attardimarketing.com](mailto:wattardi@attardimarketing.com) for a group rate.**



## National Energy Issues to Watch...

- 1. *Many Consumers Still in the Dark Over Incandescent Phaseout*** - While more than one-third of Americans are aware of the federal phaseout of incandescent light bulbs, the majority of consumers have yet to learn that the 100-watt bulb is scheduled to disappear from store shelves beginning in 2012. This is one of the many findings of an Osram Sylvania consumer survey involving 300 homeowners and renters nationwide. Overall, the public appears to be optimistic toward the changes ahead: 59% of respondents reported that they were eager to use more energy-efficient lighting solutions. 60% plan to switch to LED, CFLs, or halogen varieties. But 28% of the consumers polled expressed concern over the loss of the traditional light bulb. Only 13% planned to stash away a supply of 100-watt bulbs. 2/18 HCN
- 2. *Registration for LIGHTFAIR International Now Open - Pennsylvania Convention Center Philadelphia, PA*** <http://www.lightfair.com/lightfair/V40/index.evn?id=10189>
  - **LIGHTFAIR Daylighting Institute** - Sun, May 15 - Mon, May 16, 2011
  - **LIGHTFAIR Institute** - Sun, May 15 - Mon, May 16, 2011
  - **Trade Show & Conference** - Tue, May 17 - Thu, May 19, 2011
- 3. *Registration Open for 2011 National Electrical Leadership Summit*** - Register now to attend the 2011 National Electrical Leadership Summit, taking place April 30 – May 3 at the Hilton San Diego Bayfront. The agenda features an expanded lineup of keynote speakers, industry panels, educational sessions, and networking opportunities to provide members with the ideas and strategies you need to plan for their business future. <http://www.naed.org/nationalelectricalleadershipsummitregistration/>
- 4. *Energy Efficient Light Bulbs Survive Congress*** - A new attack on the ban on incandescent light bulbs – the one that isn't actually a ban – didn't get very far. According to the Natural Resources Defense Council (NRDC), U.S. House Representative Todd Akin (R-Mo.) recently withdrew an amendment that would have denied funding for the DOE to carry out new energy efficiency standards for light bulbs set to begin going into effect in 2012. 2/21 Earth Techling
- 5. *A Tipping Point for Oil Prices*** -The days of \$100 a barrel oil are back. Most economists think that this price level, while high by historical standards and an impediment to growth, is not high enough to completely derail the economic recovery. We are still below a national average price of \$3.50 for regular gasoline, the price at which consumers are thought to get worried and rein in their discretionary spending. The average national price is now \$3.29 according to A.A.A., roughly 18 cents higher than a month ago and 50 cents higher from a year ago. 2/26 NY Times
- 6. *New Reports Chart Path to Zero-Net-Energy Commercial Buildings*** - Two new reports from the Zero Energy Commercial Buildings Consortium (CBC) on achieving net-zero-energy use in commercial buildings say “high levels of energy efficiency are the first, largest and most important step on the way to net-zero.” There are many definitions of net-zero-energy buildings, but typically they are highly energy efficient buildings that use no more energy than they can produce on site on an annual basis. Free copies of the full reports can be downloaded at <http://zeroenergycbc.org/>



7. **Chu: Budget is Part of Plan to Win Future** - The DOE's \$29.5 billion budget proposed by President Barack Obama for FY 2012 invests in what is needed and eliminates what is not, Secretary of Energy Steven Chu said Monday in a press briefing. The FY 2012 budget, Chu said, is part of an administration-wide plan to win the future by "out-innovating, out-educating and out-building the rest of the world," while at the same time cutting programs and expenses. [www.aikenstandard.com](http://www.aikenstandard.com)

8. **Rising Fuel Prices Could Cramp Economic Recovery** - Consumers are already seeing the fallout from turmoil in the Middle East and North Africa every time they fill their gas tanks. It's what they don't see that's the bigger worry for the U.S. economy. From the farm to the factory, businesses are facing higher costs to grow the nation's food, ship goods and manufacture products at a time when they're already cautious about hiring new employees or placing big orders. The added burden of sustained fuel price increases could slow the nation's already sluggish economic growth, analysts said. By some estimates, every penny increase at the pump sucks \$1.5 billion from household spending nationwide. Volatile fuel prices have some businesses looking to make permanent adjustments to their operations. 2/24 LA Times

9. **Next Generation Luminaires™ Announces LED Design Competition Winners** - Winners of the third annual Next Generation Luminaires™ awards were announced 2/23 at the Strategies in Light Conference in Santa Clara, California. Out of 138 entries from 61 companies, 33 were recognized this year as winners and another four were chosen as "best in class."

- The Lighting Quotient Inc. for its Linear Concealed LED Luminaire cove lighting fixture
- Philips Color Kinetics for its eW Burst Powercore facade lighting fixture
- Koncept Technologies Inc. for its Equo LED Desk Lamp task lighting fixture
- USAI for its NanoLED recessed accent lighting fixture.

More information on all the winning entries is available at [www.ngldc.org](http://www.ngldc.org)

10. **National Lighting Product Information Program Releases New Report on Street Lighting Technologies** - The National Lighting Product Information Program (NLPiP) released its latest *Specifier Report*, designed to provide objective performance information on existing street lighting technologies including LEDs, induction, and high pressure sodium (HPS) streetlights. This report comes at a critical time when many municipalities, some with funding from the American Recovery and Reinvestment Act of 2009, are in the process of replacing HPS streetlights with LED and induction models.

<http://www.lrc.rpi.edu/nlpip/publicationDetails.asp?id=927&type=1>

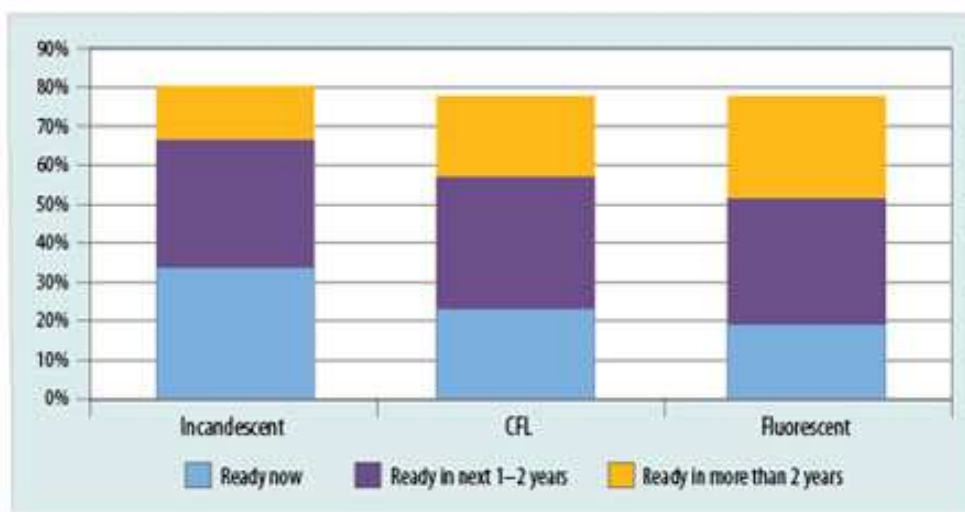


11. **DOE Publishes Detailed Results from Round 11 of CALiPER Testing** – The DOE has published the detailed test reports from Round 11 of product testing conducted through the DOE Solid-State Lighting (SSL) CALiPER program. Detailed results from Round 11, covering roadway arm-mount luminaires, roadway post-top luminaires, linear replacement lamps, high-bay luminaires, and small replacement lamps (MR16, PAR lamps, A-lamps, and a candelabra lamp), are now available through the searchable online CALiPER system: [www.ssl.energy.gov/search.html](http://www.ssl.energy.gov/search.html) A Summary Report containing the results from Round 11 is available at [www.ssl.energy.gov/reports.html](http://www.ssl.energy.gov/reports.html)



**12. Survey Illuminates Lighting Trends by Joseph M. Kelly** - Electrical contractors have seen the bright lights of opportunity borne by involvement in lighting specification and installation. Over time, market forces have drawn ECs further into the fold, allowing them to increasingly influence brands and make specification decisions and, ultimately, become very vital decisionmakers when it comes to lighting-related projects. This change has occurred across the lighting spectrum, through all categories, including lamps, ballasts, fixtures and controls. LED trends are something to keep an eye on. One-third of electrical contractors say that LEDs are poised to replace incandescent lamps, compared with 23 percent thinking LEDs are currently ready to replace compact fluorescents and another 19 percent suggesting LEDs are ready to replace fluorescent lamps. An additional one-third of those surveyed think that LEDs will be ready to replace each of these lamp types within the next one or two years. 2/11 Electrical Contractor

**FIGURE 2** Market Readiness of LEDs to Replace ...



**13. January Housing Starts Rise 14.6%** - Residential construction showed a rebound in January as housing starts improved to a pace of 596,000 -- a 14.6% increase over the downwardly revised December pace of 520,000. Compared with a year ago, total starts are down 2.6%, according to the Department of Commerce [residential construction report](#) released Wednesday. 2/16 HCN

**14. Existing-Home Sales Increase in January** - Existing home sales estimates began 2011 on a positive note: up 2.7% to a seasonally adjusted annual rate of 5.36 million. That's up from a downwardly revised 5.22 million in December. According to the estimate from the National Association of Realtors (NAR) released Wednesday morning, existing home sales are 5.3% ahead of the 5.09 million in January 2010. 2/23 HCN

**15. New Residential Sales in January 2011** - Sales of new single-family houses in January 2011 were at a seasonally adjusted annual rate of 284,000, according to estimates released jointly today by the U.S. Census Bureau and the Department of Housing and Urban Development. This is 12.6 percent ( $\pm 11.2\%$ ) below the revised December rate of 325,000 and is 18.6 percent ( $\pm 15.4\%$ ) below the January 2010 estimate of 349,000. <http://www.census.gov/newhomesales>

**16. Pending Home Sales Decline in January** -Pending home sales are down in January for the second straight month, and are down 1.5% compared with the January 2010 figure, according to the National Association of Realtors (NAR). The Pending Home Sales Index, a forward-looking indicator, declined 2.8% to 88.9 based on contracts signed in January from a downwardly revised 91.5 in December. 3/1 HCN

**17. Jobs Report: Don't Break Out the Champagne Just Yet** -Finally, the economy appears to be delivering jobs--adding 222,000 private sector jobs and 192,000, after losses in government are subtracted, in February. The unemployment rate fell to 8.9%, even as the labor force expanded with normal population growth and a steady, albeit low by historical standards, labor force participation rate. Counting those who have left the labor force and taking part-time work but would prefer full time employment, the true unemployment rate remains about 16%. The economy must add 13 million private sector jobs over the next three years-360,000 each month-to bring unemployment down to 6%. [www.foxbusiness.com](http://www.foxbusiness.com)



**18. GOP Cuts Target EPA, High Speed Rail** - The EPA's cuts alone are estimated at \$1.6 billion from Obama's 2011 budget. Among the cuts, the elimination of President Barack Obama's \$5 billion high-speed rail initiative is no surprise. The Energy Department appears especially hard hit. Its current energy efficiency and renewable energy programs would be cut virtually in half, and Republicans are also proposing to provide just \$4.01 billion for energy science—an 18 percent or \$893 million cut from last year's appropriations. 2/9 Politico

**19. After Two Years of Declines, Hardware Sales Are Up** - Hardware store sales increased slightly in 2010, according to the Census Bureau's Monthly & Annual Trade Report. It showed December sales for hardware stores -- NAICS code 44413 -- reached \$1.684 billion in December, the most recent month of available data in this business classification. That unadjusted figure is up 4.5% from the unadjusted figure from December 2009. For the full year, hardware stores sales were \$18.756 billion, up 0.7% from 2009. It was the first increase in NAICS code 44413 sales since 2007 showed an increase over 2006. 2/15 HCN



- 20. Law Shedding Light on Bulbs** - Despite avid media coverage and education campaigns by the government and environmental groups, consumers still aren't flocking to newer, energy-efficient light bulbs. Even in states with long-running and well-funded programs to promote compact fluorescent lamps, only 1 in 5 household sockets contain those bulbs, according to a report by the U.S. Department of Energy. Sales of CFLs peaked in 2007 and have declined since, the report says. Some consumers aware of the coming change — 13 percent — plan to stock up on incandescent 100-watt bulbs while they can get them, the survey found. 3/4 Chicago Tribune
- 21. OSRAM Expanding in the Market for Energy-Efficient Lighting Systems and Luminaires** - Acquisition of Siteco Lighting GmbH opens up further potential for growth in LED applications. OSRAM is acquiring Siteco Lighting GmbH based in Traunreut/Germany from Barclays Private Equity. Siteco is a leading European lighting company with a worldwide workforce of 1250 and achieving revenue of around €220 million in fiscal year 2010. The company supplies luminaires and lighting systems for urban infrastructures such as public and commercial buildings, streets, tunnels, airports and sports stadiums.  
[http://www.osram.com/osram.com/News/Trade\\_Press/Luminaires/2011/110228\\_Siteco.html](http://www.osram.com/osram.com/News/Trade_Press/Luminaires/2011/110228_Siteco.html)
- 22. Siemens Said to Weigh IPO for Osram Unit within Two Months** - Siemens AG, Europe's largest engineering company, is weighing an initial public offering of its Osram lighting business within the next two months. Selling Osram would bring Siemens closer to a complete withdrawal from consumer-oriented products, after giving up phones and moving the home-appliance unit into a joint venture. Siemens's other consumer product is hearing aids, which the company considered selling before shelving the plan last year. Osram, the second-largest lighting company by sales after Royal Philips Electronics NV, has an enterprise value of 6.5 billion euros (\$9 billion) to 7 billion euros, Morgan Stanley estimates. <http://www.bloomberg.com/news/2011-02-28/siemens-is-said-to-consider-ipo-for-osram-light-division-within-two-months.html?cmpid=yahoo>
- 23. Amerlux Introduces 10-Year Warranty on LED Light Fixture Products** - This warranty applies to the company's LED lighting fixtures beginning February 1, 2011 and demonstrates the company's confidence in its vast selection of these breakthrough products. "At Amerlux we have stood behind all of our product lines from the very beginning," noted Frank Diassi, Amerlux chairman and founder. "Our new 10-year warranty adds exciting new levels of value and assurance for our lighting customers in every category." Complete information is available at [www.amerlux.com](http://www.amerlux.com)
- 24. Cree LBR-30™ LED Lamp Sets New Industry Benchmark for Color Rendering** - Cree, Inc. announces commercial availability of the LBR-30™ LED lamp, aimed at replacing energy-wasting incandescent lamps commonly used in tracks, commercial and residential recessed downlights. Powered by Cree TrueWhite® Technology, the lamp delivers warm-white light with unrivaled color accuracy and efficiency. Thanks to its high color rendering index (CRI) of 94, the LBR-30 lamp is optimized for applications where high color accuracy is essential, including restaurants, retail stores, groceries and museums. It delivers 600 lumens, equivalent to a 60 watt incandescent BR30, while using only 12 watts of input power. The lamp is designed to last 50,000 hours in open fixtures. 2/21 BUSINESS WIRE



**25. Leviton Joins LED Standards Council** - Leviton has announced its membership in Zhaga, an industry co-op of lighting manufacturers aimed at the development of standards and specifications for the interfaces of LED light engines. Zhaga standards enable interchangeability between products made by diverse manufacturers. The consortium was established for the benefit of consumers and professional buyers of light engines and luminaires. <http://www.zhagastandard.org/> / 2/9 HCN

**26. Philips LED Bulb to Cost Around \$60** - Final pricing on the 60-watt equivalent EnduraLED bulb from Philips hasn't been released yet, but Ed Crawford, CEO of Philips Lighting in North America, told us that it will sell in the \$60 range. Commercial customers will likely be able to buy the EnduraLED in September or October, while residential consumers will get their hands on it in December. It will emit 806 lumens, last at least 25,000 hours, consume 12 watts of power and will save people who buy it \$60 over its lifetime.



**27. Philips Lumileds Promises Freedom from Binning for White LEDs**

- Philips Lumileds has unveiled its Freedom From Binning program, which is intended to relieve concerns over white-light consistency and uniformity, and to simplify the design process for LED solutions. Lumileds intends to offer white Luxeon emitters for which there are no color bin selections, because the LEDs are sufficiently uniform and consistent. This also involves hot testing and binning at 85°C. The program has been launched at Strategies in Light with 2700K and 3000K white LEDs. Lumileds plans to proliferate Freedom From Binning through new product introductions this year and into the future. <http://www.ledsmagazine.com/news/8/2/25>

**28. LCA Updates Education Express Course on LED Lighting Control** - Residing at the Lighting Controls Association's website, EE300: Lighting Control of LEDs provides in-depth education about lighting controls and controllable ballast technology, application, system design and commissioning, as well as meta-issues such as energy codes, daylighting and other trends. <http://lightingcontrolsassociation.org/lighting-controls-association-updates-education-express-course-on-led-lighting-control/>

**29. LCA TV Now Broadcasting on YouTube** - Check out videos of new products, product demos and other interesting control-related videos at the [Lighting Controls Association's new YouTube channel](#) Coming soon: At LIGHTFAIR, the Lighting Controls Association will be shooting and producing short videos demonstrating new products being introduced at the show, to be posted here and at LCA's YouTube channel.

**30. Bill Brown Sales Launches New Website** - Bill Brown Sales (BBS), the leading component sales agency to lighting fixture OEMs, announces the launch of its new website at <http://www.billbrownsales.com>. The user-friendly site offers a profile of each manufacturer that BBS represents, the latest product news, a calendar of upcoming trade shows, full contact details, resource information and much more.

## ***State Energy Issues to Watch...***

- 31. *The Designlights™ Consortium (DLC) Is the Northeast's Premier Resource for High-Quality, Energy Efficient, Commercial Lighting Design and Information*** - The DLC <http://designlights.org/> — a collaboration of utility companies and regional energy efficiency organizations — is committed to raising awareness of the benefits of efficient lighting in commercial buildings. To view the qualified products list as of 02/27/2011 [click here](#) Northeast Energy Efficiency Partnerships (NEEP) manages this website. However DesignLights™ Consortium stands as its own entity.
- 32. *PCB Removal, With Zero Upfront*** - New York City is allocating \$708 million for an energy retrofit program in public schools over the next 10 years that is mostly spurred by the need to replace light fixtures containing the toxic chemicals known as PCBs. For some months, the cost issue was a major factor delaying this week's decision to replace the lighting at nearly 800 schools. But some energy service companies say they are willing to undertake the job with no upfront costs. Instead, they suggest that they could be paid with the savings that the city racks up by switching to more energy-efficient lighting. 2/25 NY Times
- 33. *Acuity's Roam Monitoring System to Control Austin's Lighting*** - by Doug Chandler - Acuity Brands' Roam remote monitoring business, based in Kennesaw, Ga., said it has been selected by the city of Austin, Texas, for a comprehensive street lighting upgrade project. The project will enable the city to control each of its approximately 70,000 streetlights with the click of a mouse, once it's completed in 2014. The city expects annual savings of more than \$1 million in combined energy and maintenance costs. The system will be installed and managed by Austin Energy, which will monitor and control the streetlights using data received every hour from the wireless Roam devices via a web-based communication system. <http://livewire.electricalmarketing.com/2011/02/18/acuitys-roam-monitoring-system-to-control-austins-lighting/>
- 34. *SF Requires Energy Audits, Benchmarking for Commercial Buildings*** - The city of San Francisco will require owners of commercial buildings of at least 10,000 square feet to conduct an energy audit every five years and annually benchmark the energy performance under an ordinance adopted this week. In addition, under the measure, starting in October, owners of commercial properties that are larger than 50,000 square feet must file an annual report summarizing the energy performance of their buildings. Using the EPA online tool, Energy Star Portfolio Manager, owners are to benchmark their properties and annually disclose to the city information that includes the energy intensity of their buildings (kBtu per square foot per year) and carbon dioxide equivalent emissions due to energy use. . New York City, Seattle and Washington State are among the cities and states that also have auditing and benchmarking regulations. 2/10 GreenBiz
- 35. *California Senate Oks Renewable Energy Bill*** - The state Senate acted Thursday to require California utilities to boost their use of wind, solar and other renewable energy sources to a third of total supply by the year 2020. California law already requires utilities to get a fifth of their power from renewable energy. If this measure becomes law, utilities will be forced to lean even more heavily on green power. Supporters said the 33% target for renewables would put California ahead of the rest of the country in green-energy use. 2/24 LA Times



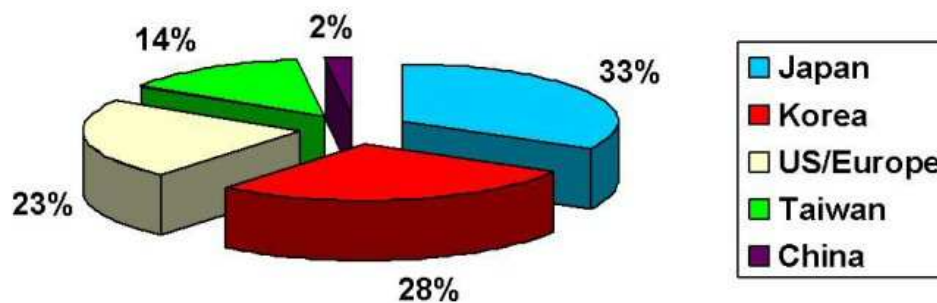
- 36. Energy Efficiency Program to Reach 100,000 Homes and Create Clean Energy Jobs for Californians** - The California Energy Commission joined regional efforts to increase energy efficiency and encourage clean jobs with the statewide launch of Energy Upgrade California, the new energy efficiency program. Part of this comprehensive program is the integrated Web Portal, <http://www.EnergyUpgradeCA.org> which provides easy to use tools and resources to property owners to help them improve their energy and water efficiency, save money and increase building comfort. More than \$1.2 billion from a variety of funding sources will be leveraged through Energy Upgrade California. 3/1 California Energy Commission
- 37. California Prepares for Influx of Electric Vehicles** - While electric vehicles are still a relative rarity in California, efforts are already under way to prepare for a future when a lot more people will be relying on the grid to "fuel up." And a new report published this month by Pike Research indicates that future could be just around the corner. The report forecasts that California will be the largest market in the United States for light-duty plug-in electric vehicles, or PEVs, which includes plug-in hybrids and all-electric vehicles. It predicts sales in the state will grow from about 14,400 in 2011 to 366,000 by the end of 2017. The state of New York, by comparison, will be the next-biggest market, with projected cumulative PEV sales of about 146,000 at the end of 2017. 3/1 California Energy Markets
- 38. Familiar Old Bulbs Going Away in Switch to Greener Technology** - Make your peace and say your goodbyes. The lights are getting ready to go out on the old-fashioned incandescent bulb. In less than a year, federal regulations will begin phasing out the century-old technology, a process that's already begun in California, which received a waiver to launch the program one year early. Manufacturers will no longer make the traditional 100-watt bulb, and stores eventually will sell out of current supplies. Consumers will have to choose from more efficient bulbs that use no more than 72 watts, including halogen incandescents, compact fluorescents and light-emitting diodes, or LEDs. 2/28 News Sentinel
- 39. South Carolina Bill Would Overturn Federal Light Bulb Ban** - Americans for Limited Government (ALG) President Bill Wilson today urged passage of a bill by South Carolina State Representatives Bill Sandifer and Dwight Loftis that would allow the manufacture and purchase of incandescent light bulbs in South Carolina that are subject to a federal ban that begins to take effect in Jan. 2012. Wilson stated, "since the bulbs would be made entirely in South Carolina and sold in South Carolina, the federal government has no power to regulate it under the Interstate Commerce Clause." 2/28 Liberty Counsel
- 40. Globalcon** - Energy, Power & Facilities Management Strategies & Technologies Conference and Expo MARCH 30 - 31, 2011 PHILADELPHIA CONVENTION CENTER, PHILADELPHIA, PA



## Monthly Special Feature... *LED Market Grew by 93% in 2010, Driven by Backlights -*

The worldwide high-brightness (HB) LED market leaped from \$5.6 billion in 2009 to \$10.8 billion in 2010, a growth rate of 93%, according to market research firm Strategies Unlimited. The total market is expected to reach \$18.9 billion in 2015, representing a compound annual growth rate (CAGR) of 11.8%. LCD monitor and TV backlights led the growth spurt, followed by mobile display applications. Ten companies accounted for more than 75% of the HB-LED market. The rank order, by revenue, of the top 10 suppliers in the HB-LED market in 2010 is: <http://www.ledsmagazine.com/news/8/2/26>

1. Nichia
2. Samsung LED
3. Osram Opto Semiconductors
4. Philips Lumileds Lighting
5. Seoul Semiconductor
6. LG Innotek
7. Cree
8. Sharp
9. Toyoda Gosei
10. Everlight



**LED market in 2010 by region. Source: Strategies Unlimited [www.strategies-u.com](http://www.strategies-u.com)**

Several paths led to this impressive growth. Samsung LED, Seoul Semiconductor, and LG Innotek rode the boom in the LCD TV and monitor backlight market. Osram rode the rise of the Chinese HB-LED market, especially in the automobile sector. Lumileds' success in high-power backlight products, cell phone flash, and architectural lighting contributed to much of its success. Cree's dedicated focus on lighting ensured its continued strong position in the solid-state lighting revolution.

Meanwhile, Chinese LED suppliers captured two percent of the market. While Chinese HB-LED technologies are currently three to five years behind the rest of the world, Strategies Unlimited expects that huge investment in the SSL industry by 2015 will help close the gap. Investments of \$17.4 billion have been announced for 2010-2015, and government subsidies and policies are helping companies to buy MOCVD systems, as well as driving initial adoption, for example in street lights.

### **Applications**

Mobile products remained the biggest application HB-LED in 2010, with 39% of the market, while backlights for TVs and monitors accounted for 33%. Lighting and automotive both accounted for 8%, signs were 6%, and other applications comprised the remaining 6%.

While LCD television/monitor backlights accounted for the largest part of the jump in HB-LED revenue in 2010, mobile applications were also significant contributors. In particular, the large rise in PC notebook sales and the penetration rate for LED backlights used in notebooks doubled HB-LED revenue over 2009.

Strategies Unlimited expects television and monitor backlights to continue to be a strong engine for growth in the next two years, and then flatten out in 2013. The CAGR for backlighting is expected to be more than 16% from 2010-2015.

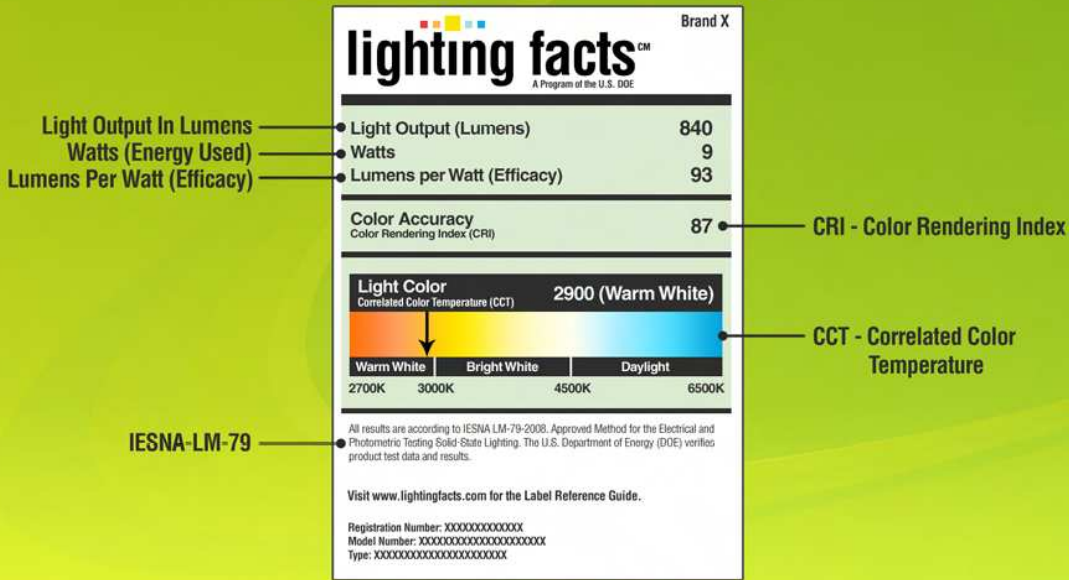
**LED luminaire design, rather than LED performance, was the primary concern for the lighting market in 2010. HB-LED component revenue for lighting was \$890 million in 2010.**

**Solid-state lighting will become the key market driver in 2014 because of the worldwide focus on energy efficiency and the phase-out of incandescent bulbs. The forecast CAGR for HB-LED components for lighting from 2010-2015 is 39%.**



Monthly Special Feature... *Lighting Facts from MaxLite -*

# THE LIGHTING FACTS LABEL (FROM THE DOE)



# ACTUAL PERFORMANCE Vs. PERFORMANCE CLAIMS

