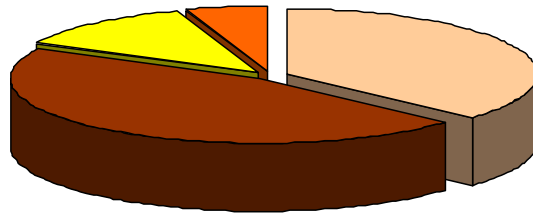


Announcement

Film and Video Professional Production LED Lighting Global Market Forecast & Analysis 2018-2028



10-year Market Forecast

This is the ElectroniCast global market forecast of LED-based professional production lights used in the television/broadcast, videography, and motion picture/film industry sectors. Over 60 companies are profiled. Also, provided is a useful Company/Product Matrix in the Excel File.

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Film and Video
Professional Production LED Lighting
Global Market Forecast & Analysis
2018-2028

Published: April 23, 2019
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Also Included: Excel worksheets – Market Forecast Data
Fee: \$4,240

One-Fee Policy All employees of the client company/organization may use this report, worldwide at the consultant service subscription fee shown in the front pages of this announcement.

10-Year Market Forecast This is the ElectroniCast global review and forecast of the use of light emitting diode (LED) professional production lighting in television/broadcast, motion pictures and videography.

Regions The market data are segmented into the following geographic regions, plus a Global summary; separate data-sheets are provided for the U.S.A. and Rest of the American region:

- America
 - United States of America
 - Rest of America
- EMEA (Europe, Middle East, plus Africa)
- APAC (Asia Pacific)

Applications The market data are segmented into the following professional production end-user groups (applications):

- Broadcast/Television
- Motion Pictures (Cinematography)
- Videography

The market forecast data are presented for the LED light fixture, segmented by the following functions:

- Consumption Value (US\$, million)
- Quantity (number/units)
- Average Selling Prices (ASP \$, each)

Market Forecast, By Light Shape and Size This report provides an independent examination and analysis of the changing market dynamics for the major types of LED-based lighting fixtures, segmented by shape/size:

- Small LED Light
 - Square or Rectangle (less than 12 x 12-inch)
 - Circular/Ring/Fresnel (less than 12-inch Outer Diameter)
- Large LED Light
 - Square or Rectangle (12 x 12-inch and Larger)
 - Circular/Ring/Fresnel (12-inch Outer Diameter and Larger)

Below, are five levels (or “food chain”) pertaining to the LED marketplace. For the purposes of THIS ElectroniCast study, we quantify and provide a market forecast for Level 5.

Level 1 - The chip or die

Level 2 - The LED component (component-level bulb)

Level 3 - LED array; may include optics, heat sink and/or power supply

Level 4 - Lamp

Level 5 – Light Fixture (complete with Lamps)

According to the market forecast report, the global consumption of LED professional lighting lamps/fixtures reached \$256.5 million in 2018. During the forecast period, the value of the LED fixtures with lamps is expected to increase to \$507 million in the year 2028. Market forecast data in the study report refers to consumption (use) for a particular calendar year; therefore, this data is not cumulative data.

The worldwide value of LED-based production lighting in the Television/Broadcast segment reached \$152 million in 2018, compared to nearly \$72.2 million in the Motion Picture (film) category and the remainder in the Videography industry segment. The TV/Broadcast industry sector is continuously challenged with expenditure reduction, due mainly to the decline in advertisement revenue; however, paid subscription-based TV, supplements the television sector in terms of upgrades in lighting.

High performance TV/Broadcast cameras require professional-grade lighting to achieve the highest expectations for Slow Motion and High Definition (HD) TV standard-based production; therefore, along with the goal of energy-efficiency, LED-based lighting is proving to be the next-generation winning technology-choice for use in sport arenas and stadiums.

TV/Broadcast stations worldwide continue to retrofit their studios with LED-based production lights, to improve the picture quality with the new HDTV-based requirements. Also, other benefits of LED lighting versus the incumbent lighting is the consumption of

less electrical power, since LEDs use less energy and also less air conditioning is required since heat generated by LED lights is negligible.

LED production lights in the motion picture/film category is driven by requirements for lighting effects and set lighting, mainly because of its flexibility. A single light source can generate a great variety of colors. Additionally, continuous cost/performance improvements driven by technological advancements are driving the LED lighting fixture market from a niche-only solution to a general use solution.

About ElectroniCast

ElectroniCast, founded in 1981, specializes in forecasting technology and global market trends in fiber optics communication components and devices, as well providing market data on light emitting diodes used in lighting.

As an independent consultancy we offer multi-client and custom market research studies to the world's leading companies based on comprehensive, in- depth analysis of quantitative and qualitative factors. This includes technology forecasting, markets and applications forecasting, strategic planning, competitive analysis, customer-satisfaction surveys and marketing/sales consultation. ElectroniCast, founded as a technology-based independent consulting firm, meets the information needs of the investment community, industry planners and related suppliers.

Market Research Methodology

Market analysis and technology forecasting are complex tasks. Any predictions of the shape and trends of technology and economic movement start from the notion that the germ of what will be important tomorrow is present, although smaller or larger or in a different form, in our environment today. However, taking as a basis for a prediction the assumptions of current, conventional belief creates a set of preconceived notions that can lead to serious mistakes. ElectroniCast, instead, looks to the basic driving forces.

Information Base

This study is based on analysis of information obtained continually over the past several years, but updated through the middle of April 2019. During this period, ElectroniCast analysts performed interviews with authoritative and representative individuals in the LED and LED lighting/fixture manufacturing (materials, integrated circuits/circuit boards, packaging, devices, connectors/pins/end-caps, plastic, aluminum and glass manufacturers, associated parts/pieces, fittings/fixtures) and advertisement, photography, broadcast and motion picture industry sectors, marketing communications, R&D, government, and other.

The interviews were conducted principally with:

- Engineers, marketing personnel and management at manufacturers of LEDs (chips, components, lamps and fixtures) as well as other technologies, especially tungsten, fluorescent, HMI, and Xenon
- Design group leaders, engineers, marketing personnel and market planners at major users and potential users of LEDs
- Other industry experts, including those focused on standards activities, trade associations, and investments

The interviews covered issues of technology, R&D support, pricing, contract size, reliability, documentation, installation/maintenance crafts, standards, supplier competition and other topics. Customers and distributors were interviewed, to obtain their estimates of quantities received and average prices paid. Customer estimates of historical and expected near term future growth of their application are obtained. Their views of use of new technology products were obtained.

The analyst then considered customer expectations of near-term growth in their application, plus forecasted economic payback of investment, technology trends and changes in government regulations and funding/tax-break legislation/rules in each geographical region, to derive estimated growth rates of quantity and price of each product subset in each application. These forecasted growth rates are combined with the estimated baseline data to obtain the long-range forecasts at the lowest detailed level of each product and application.

A full review of published information (secondary research) was also performed to supplement information obtained through primary research (interviews). The following sources were reviewed:

- Professional technical journals and papers
- Trade press articles; Product literature
- Technical conference proceedings
- Company profile and financial information
- Additional information based on previous ElectroniCast market studies
- Personal knowledge of the research team

In analyzing and forecasting the complexities of worldwide markets for light emitting diode products, it is essential that the market research team have a good and a deep understanding of the technology and of the industry. ElectroniCast consultants who participated in this report were qualified.

Bottom-up Methodology ElectroniCast market forecasts data are developed initially at the lowest detail level, and then summed to successively higher levels. The background market research focuses on the amount of each type of product projected-use in each application in the base year (last year - 2018), and the prices paid at the first transaction from the manufacturer. This forms the base year data.

ElectroniCast analysts then forecast the growth rates in component quantity use in each application, along with price trends, based on competitive, economic and technology forecast trends, and apply these to derive long term forecasts at the lowest application levels. The usage growth rate forecasts depend heavily on analysis of overall end user trends toward equipment usage and economic payback.

Proprietary Statement

All data and other information contained in this data base are proprietary to ElectroniCast and may not be distributed or provided in either original or reproduced form to anyone outside the client's internal employee organization, without prior written permission of ElectroniCast.

ElectroniCast, in addition to multiple-client programs, conducts proprietary custom studies for single clients in all areas of management planning and interest. Other independent consultants, therefore, are considered directly competitive. ElectroniCast proprietary information may not be provided to such consultants without written permission from ElectroniCast Consultants.

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