Smart Buildings: The Lighting Controls Business 2015 to 2020

Description: This report is the definitive resource for Lighting Controls Market Research & Investment Analysis.

Why do you Need this Report?

Understand why 2015 is the most exciting time for the lighting industry since the early twentieth century. Lighting is truly at an inflection point and the forthcoming shakeout over the next 5 years will determine the winners and losers in the game; as well as those who will be the lighting giants of the future.

Gain insightful information about this business for your strategic planning exercises. Understand how technology, and specifically LEDs, are influencing the future of lighting control and the effect it will have on your business and investments.

What is driving M&A and Investment in this business? Discover the valuations and exit multiples paid for lighting companies.

Lighting is undergoing a rapid transformation as Light Emitting Diodes (LED) become the number one source of light in buildings. This is the single most important driver for the growth of Bus-based lighting controls and their convergence with IT Networks and integration into the Building Internet of Things (BioT).

The transition to LEDs for lighting has come at the same time as the development of the Internet of Things, referred to in this report as the Building Internet of Things (BioT), which is about to disrupt the building automation systems (BAS) industry and opens up the possibility for lighting control to play a much more important role.

These together with wireless networking technology and the future development of Li-Fi will open up the latent demand in the retrofit market and the small building sector hitherto not economically viable.

- This latest research has led us to make revisions to the total value of lighting controls sold from 2013 onwards. We believe sales in 2013 reached $1.814 billion, some 8.7% higher than we previously thought. This reflects the fact that the global economic down turn from 2008 has had less impact on this particular market, and a better recovery.

- Other influences on the value of the market, and the difficulty in predicting how the retrofit element might grow, means we predict a CAGR of just under 10.6% until the year 2020.

- There is a very large opportunity to develop the retrofit market that supplies lighting controls into existing installations. New construction projects account for, perhaps, 3-5% of non-domestic floor space each year; the existing building market offers up to 10 times more projects.

- In the last two complete years, 2013 and 2014, there has been a marked decline in M&A activity, both in value and the number of deals struck. However, 2015 has already seen a significant increase in value with a reported total of $3,435 million involved. Although the recent Philips divestment accounts for some $2,800 million of this total. The remaining $635 million is still a big increase on the previous 2 years.

Who Should Buy this Report?

The information contained in this report will be of value to all those engaged in managing, operating and investing in lighting companies (and their advisors) around the world. In particular those wishing to acquire, merge, sell or find alliance partners will find it particularly useful.

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