



CENTRE FOR INDUSTRIAL STUDIES

# “Il mercato mondiale degli apparecchi per illuminazione: il posizionamento competitivo della industria italiana”

*Preparato per:*

Assil

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## CSIL Centre for Industrial Studies: an overview

### WHO WE ARE

Founded in Milan (Italy) in 1980, the Centre for Industrial Studies (CSIL) is an independent research and consulting company specialized in applied economic research, market analysis, SMEs economics, evaluation of public investment projects and development policies.

### WHAT WE DO

The research activities at CSIL are structured around two distinct but interrelated business areas:

- **Industry Studies and Market Research**
- **Development and Evaluation Studies**

Consistency and complementarity are ensured by: a common statistical office and a scientific committee providing quality control over the methodological approach.

### OUR VISION

CSIL pursues an empirical and experimental perspective, based on the direct observation of evidence with a concrete and versatile approach. CSIL experts pursue their work with intellectual integrity and a genuine passion for understanding growth and innovation processes.



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- Founding Partner and President of the Scientific Committee of CSIL.
- MSc in Business Administration.
- Over 30 years of working experience in the field of competitiveness assessment, market performance analysis, industry benchmarking
- Customized and multiclient market research in Europe, Russia, Turkey, China, India, Japan, United States, Latin America, Middle East, Africa.

### LAB | the Laboratory Innovation unit

Provides market research and business intelligence services. It mainly focus on the lighting supply chain (including LEDs, lighting fixtures and related business), KBA (kitchen furniture, bathroom fittings, appliances) and eco-building issues.

# 1. Il mercato mondiale della illuminazione

## 1.1 Dati di base

Il mercato mondiale degli apparecchi di illuminazione per il 2015 è stimato da CSIL pari a 79 miliardi di Euro (88 miliardi di Dollari).

La forte oscillazione del cambio Euro-Dollaro rende complessa una valutazione degli andamenti:

- In dollari, tra il 2010 e il 2015 la crescita è stata pari al 28% (in Dollari) e sostanzialmente nulla nel 2015
- In Euro (ricordiamo che il cambio con il dollaro si aggira intorno ad 1.3 fra il 2010 ed il 2014, ma cade ad 1.3 nel 2015) la variazione quinquennale sfiora il 50%, ed il 2015 sull'anno precedente mostra una crescita (sostanzialmente nominale) del 20%.

Nel dettaglio, migliore è stata la performance per la illuminazione professionale (circa il 32% di crescita in dollari su base quinquennale).

Un poco di più il professionale indoor (Retail, Office, Hospitality...) un poco meno l'illuminazione Industriale e per Esterni.

Csil prevede per il 2020 un mercato mondiale nell'ordine dei 108 miliardi di Dollari.

L'Italia è il sesto produttore mondiale di apparecchi di illuminazione, il quinto esportatore, il decimo mercato mondiale in valore. In termini di saldo algebrico fra esportazioni ed importazioni (esportazioni nette), l'Italia occupa la terza posizione mondiale, dopo Cina e Messico.

**TABLE 1.1 Production and consumption of lighting fixtures, 2015: focus on 66 countries. EUR million. Comparison with macro indicators. Ranking by production**

| Country              | Prod EUR Million | Cons EUR Million | Pop Million  | GNP EUR Billion | GNP Pc EUR    |
|----------------------|------------------|------------------|--------------|-----------------|---------------|
| China                | 38,758           | 14,629           | 1,371        | 9,665           | 7,049         |
| United States        | 10,461           | 17,758           | 321          | 15,919          | 49,593        |
| Japan                | 5,144            | 5,942            | 127          | 4,196           | 33,040        |
| Mexico               | 3,111            | 1,937            | 127          | 1,112           | 8,757         |
| Germany              | 2,951            | 3,028            | 81           | 3,360           | 41,479        |
| Italy                | 2,386            | 1,607            | 61           | 1,797           | 29,460        |
| South Korea          | 2,056            | 1,928            | 51           | 1,252           | 24,545        |
| India                | 1,674            | 2,189            | 1,311        | 1,878           | 1,433         |
| United Kingdom       | 1,587            | 2,794            | 65           | 2,544           | 39,141        |
| Brazil               | 1,462            | 1,651            | 208          | 1,845           | 8,869         |
| Poland               | 1,048            | 942              | 38           | 458             | 12,048        |
| France               | 960              | 1,709            | 67           | 2,443           | 36,466        |
| Russia               | 902              | 1,426            | 144          | 1,504           | 10,445        |
| Taiwan               | 788              | 576              | 23           | 433             | 18,808        |
| Turkey               | 644              | 878              | 79           | 706             | 8,932         |
| Spain                | 638              | 859              | 46           | 1,193           | 25,940        |
| Canada               | 602              | 1,519            | 36           | 1,535           | 42,633        |
| Austria              | 540              | 477              | 9            | 366             | 40,655        |
| Malaysia             | 502              | 508              | 30           | 289             | 9,643         |
| Indonesia            | 499              | 555              | 258          | 799             | 3,098         |
| Philippines          | 484              | 506              | 101          | 322             | 3,186         |
| Argentina            | 399              | 459              | 43           | 528             | 12,282        |
| Thailand             | 389              | 525              | 68           | 344             | 5,063         |
| Czech Republic       | 382              | 298              | 11           | 171             | 15,567        |
| South Africa         | 371              | 467              | 55           | 300             | 5,457         |
| Denmark              | 333              | 357              | 6            | 300             | 50,018        |
| Colombia             | 324              | 394              | 48           | 310             | 6,459         |
| Sweden               | 300              | 607              | 10           | 510             | 51,009        |
| Egypt                | 268              | 352              | 92           | 276             | 2,998         |
| Netherlands          | 260              | 539              | 17           | 747             | 43,948        |
| Belgium              | 256              | 463              | 11           | 452             | 41,047        |
| Finland              | 252              | 345              | 5            | 229             | 45,782        |
| Hungary              | 251              | 231              | 10           | 115             | 11,536        |
| Venezuela            | 249              | 308              | 31           | 322             | 10,379        |
| Romania              | 212              | 272              | 20           | 169             | 8,472         |
| Morocco              | 155              | 233              | 34           | 96              | 2,810         |
| Australia            | 144              | 914              | 24           | 1,288           | 53,660        |
| Saudi Arabia         | 143              | 619              | 32           | 670             | 20,925        |
| Chile                | 141              | 306              | 18           | 227             | 12,617        |
| Slovakia             | 134              | 163              | 5            | 85              | 16,943        |
| Israel               | 133              | 312              | 8            | 268             | 33,458        |
| Greece               | 132              | 184              | 11           | 198             | 18,025        |
| Portugal             | 132              | 170              | 10           | 191             | 19,106        |
| Algeria              | 96               | 172              | 40           | 174             | 4,348         |
| Vietnam              | 94               | 686              | 92           | 164             | 1,783         |
| Ukraine              | 94               | 189              | 45           | 101             | 2,243         |
| Bulgaria             | 91               | 98               | 7            | 47              | 6,695         |
| Estonia              | 86               | 63               | 1            | 22              | 21,629        |
| Slovenia             | 83               | 89               | 2            | 42              | 21,179        |
| Tunisia              | 80               | 84               | 11           | 40              | 3,605         |
| Kazakhstan           | 79               | 124              | 18           | 183             | 10,164        |
| New Zealand          | 57               | 188              | 5            | 166             | 33,165        |
| Ireland              | 47               | 151              | 5            | 196             | 39,113        |
| Belarus              | 47               | 70               | 10           | 55              | 5,497         |
| Singapore            | 46               | 217              | 6            | 260             | 43,259        |
| Lithuania            | 43               | 41               | 3            | 40              | 13,218        |
| Lebanon              | 33               | 90               | 6            | 41              | 6,909         |
| United Arab Emirates | 33               | 883              | 9            | 356             | 39,554        |
| Croatia              | 29               | 76               | 4            | 49              | 12,167        |
| Bahrain              | 27               | 49               | 1            | 25              | 25,234        |
| Norway               | 24               | 388              | 5            | 439             | 87,779        |
| Kuwait               | 23               | 130              | 4            | 143             | 35,824        |
| Oman                 | 17               | 88               | 4            | 68              | 17,123        |
| Switzerland          | 17               | 561              | 8            | 629             | 78,632        |
| Qatar                | 16               | 197              | 2            | 172             | 86,067        |
| Jordan               | 8                | 62               | 8            | 32              | 4,056         |
| <b>Total</b>         | <b>83,728</b>    | <b>76,629</b>    | <b>5,419</b> | <b>64,855</b>   | <b>11,968</b> |

Source: CSIL processing of official data

TABLE 1.2 Worldwide market. Consumption of total lighting fixtures, 2010-2015 estimated data and 2016-2020 forecasts. EUR million

|  | EUR million   |               |               |               |               |               |               |               |               |               |               |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
|  | 2010          | 2011          | 2012          | 2013          | 2014          | 2015          | 2016*         | 2017**        | 2018**        | 2019**        | 2020**        |
| <b>North America</b>                           | 11,929        | 11,731        | 13,808        | 14,047        | 15,013        | 19,277        | 19,572        | 19,900        | 20,335        | 20,714        | 21,022        |
| Of which:                                      |               |               |               |               |               |               |               |               |               |               |               |
| - United States                                | 10,880        | 10,692        | 12,626        | 12,863        | 13,770        | 17,758        | 18,038        | 18,345        | 18,750        | 19,099        | 19,379        |
| - Canada                                       | 1,050         | 1,039         | 1,182         | 1,185         | 1,242         | 1,519         | 1,534         | 1,554         | 1,585         | 1,615         | 1,643         |
| <b>West Europe</b>                             | 11,830        | 12,121        | 12,435        | 12,548        | 13,287        | 14,240        | 14,476        | 14,574        | 14,800        | 15,008        | 15,200        |
| <b>China</b>                                   | 8,662         | 9,070         | 10,810        | 11,199        | 11,968        | 14,629        | 15,808        | 16,884        | 18,119        | 19,411        | 20,738        |
| <b>Japan</b>                                   | 4,930         | 4,693         | 5,602         | 5,197         | 5,138         | 5,942         | 5,954         | 5,930         | 5,936         | 5,951         | 5,914         |
| <b>Asia and Pacific</b>                        | 3,558         | 3,717         | 4,344         | 4,548         | 4,987         | 6,601         | 6,873         | 7,131         | 7,458         | 7,798         | 8,150         |
| Of which:                                      |               |               |               |               |               |               |               |               |               |               |               |
| - Asia and Pacific (a)                         | 2,214         | 2,309         | 2,660         | 2,773         | 2,971         | 3,822         | 3,924         | 4,016         | 4,142         | 4,269         | 4,394         |
| - Asia and Pacific (b)                         | 1,344         | 1,409         | 1,684         | 1,776         | 2,016         | 2,780         | 2,949         | 3,116         | 3,316         | 3,530         | 3,756         |
| <b>Latin America</b>                           | 3,567         | 3,734         | 4,234         | 4,284         | 4,230         | 5,055         | 4,982         | 5,017         | 5,128         | 5,265         | 5,406         |
| <b>CE Europe</b>                               | 1,707         | 1,815         | 1,894         | 1,985         | 2,101         | 2,273         | 2,351         | 2,418         | 2,499         | 2,576         | 2,649         |
| <b>Russia and other CIS Countries</b>          | 1,475         | 1,548         | 1,820         | 1,890         | 1,717         | 1,809         | 1,786         | 1,792         | 1,815         | 1,844         | 1,875         |
| <b>Middle East</b>                             | 1,054         | 1,137         | 1,519         | 1,783         | 2,131         | 2,429         | 2,484         | 2,539         | 2,622         | 2,706         | 2,789         |
| <b>India</b>                                   | 1,208         | 1,272         | 1,394         | 1,511         | 1,660         | 2,189         | 2,394         | 2,601         | 2,847         | 3,117         | 3,413         |
| <b>Africa</b>                                  | 872           | 844           | 974           | 1,048         | 1,075         | 1,308         | 1,335         | 1,368         | 1,418         | 1,479         | 1,543         |
| <b>Turkey</b>                                  | 542           | 632           | 644           | 685           | 684           | 878           | 911           | 936           | 970           | 1,006         | 1,043         |
| <b>66 Countries</b>                            | <b>51,336</b> | <b>52,316</b> | <b>59,478</b> | <b>60,726</b> | <b>63,993</b> | <b>76,629</b> | <b>78,927</b> | <b>81,090</b> | <b>83,947</b> | <b>86,875</b> | <b>89,742</b> |
| <b>Exports from China to Rest of the World</b> | <b>435</b>    | <b>514</b>    | <b>624</b>    | <b>1,037</b>  | <b>1,705</b>  | <b>2,406</b>  | <b>2,635</b>  | <b>2,865</b>  | <b>3,137</b>  | <b>3,398</b>  | <b>3,675</b>  |
| <b>Worldwide market</b>                        | <b>51,771</b> | <b>52,830</b> | <b>60,101</b> | <b>61,764</b> | <b>65,698</b> | <b>79,035</b> | <b>81,561</b> | <b>83,955</b> | <b>87,084</b> | <b>90,272</b> | <b>93,417</b> |

Source: CSIL processing

(\*) 2016: average exchange rate EUR-USD for the period January-September 2016

(\*\*) 2017-2020: exchange rate EUR-USD estimate by IMF

**TABLE 1.3 Worldwide market. Consumption of total lighting fixtures by segment, 2010-2015 estimated data and 2016-2020 forecasts. EUR million, % share in value and % annual change**

|                         | 2010          | 2011          | 2012          | 2013          | 2014          | 2015          | 2016*         | 2017**        | 2018**        | 2019**        | 2020**        |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| <b>EUR million</b>      |               |               |               |               |               |               |               |               |               |               |               |
| Residential             | 16,529        | 16,598        | 18,207        | 18,678        | 19,872        | 23,572        | 24,158        | 24,689        | 25,434        | 26,167        | 26,877        |
| Commercial              | 16,414        | 16,750        | 19,653        | 20,382        | 21,615        | 26,872        | 27,894        | 28,797        | 30,218        | 31,595        | 32,696        |
| Industrial              | 7,317         | 7,649         | 8,653         | 8,498         | 8,444         | 10,255        | 10,179        | 10,320        | 10,532        | 10,664        | 11,144        |
| Outdoor                 | 11,511        | 11,833        | 13,588        | 14,206        | 15,768        | 18,336        | 19,330        | 20,149        | 20,900        | 21,846        | 22,700        |
| <b>Worldwide market</b> | <b>51,771</b> | <b>52,830</b> | <b>60,101</b> | <b>61,764</b> | <b>65,698</b> | <b>79,035</b> | <b>81,561</b> | <b>83,955</b> | <b>87,084</b> | <b>90,272</b> | <b>93,417</b> |
| <b>% share in value</b> |               |               |               |               |               |               |               |               |               |               |               |
| Residential             | 31.9          | 31.4          | 30.3          | 30.2          | 30.2          | 29.8          | 29.6          | 29.4          | 29.2          | 29.0          | 28.8          |
| Commercial              | 31.7          | 31.7          | 32.7          | 33.0          | 32.9          | 34.0          | 34.2          | 34.3          | 34.7          | 35.0          | 35.0          |
| Industrial              | 14.1          | 14.5          | 14.4          | 13.8          | 12.9          | 13.0          | 12.5          | 12.3          | 12.1          | 11.8          | 11.9          |
| Outdoor                 | 22.2          | 22.4          | 22.6          | 23.0          | 24.0          | 23.2          | 23.7          | 24.0          | 24.0          | 24.2          | 24.3          |
| <b>Worldwide market</b> | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  |
| <b>% annual change</b>  |               |               |               |               |               |               |               |               |               |               |               |
| Residential             | 12.4          | 0.4           | 9.7           | 2.6           | 6.4           | 18.6          | 2.5           | 2.2           | 3.0           | 2.9           | 2.7           |
| Commercial              | 15.1          | 2.0           | 17.3          | 3.7           | 6.0           | 24.3          | 3.8           | 3.2           | 4.9           | 4.6           | 3.5           |
| Industrial              | 15.3          | 4.5           | 13.1          | -1.8          | -0.6          | 21.5          | -0.7          | 1.4           | 2.1           | 1.3           | 4.5           |
| Outdoor                 | 15.6          | 2.8           | 14.8          | 4.5           | 11.0          | 16.3          | 5.4           | 4.2           | 3.7           | 4.5           | 3.9           |
| <b>Worldwide market</b> | <b>14.4</b>   | <b>2.0</b>    | <b>13.8</b>   | <b>2.8</b>    | <b>6.4</b>    | <b>20.3</b>   | <b>3.2</b>    | <b>2.9</b>    | <b>3.7</b>    | <b>3.7</b>    | <b>3.5</b>    |

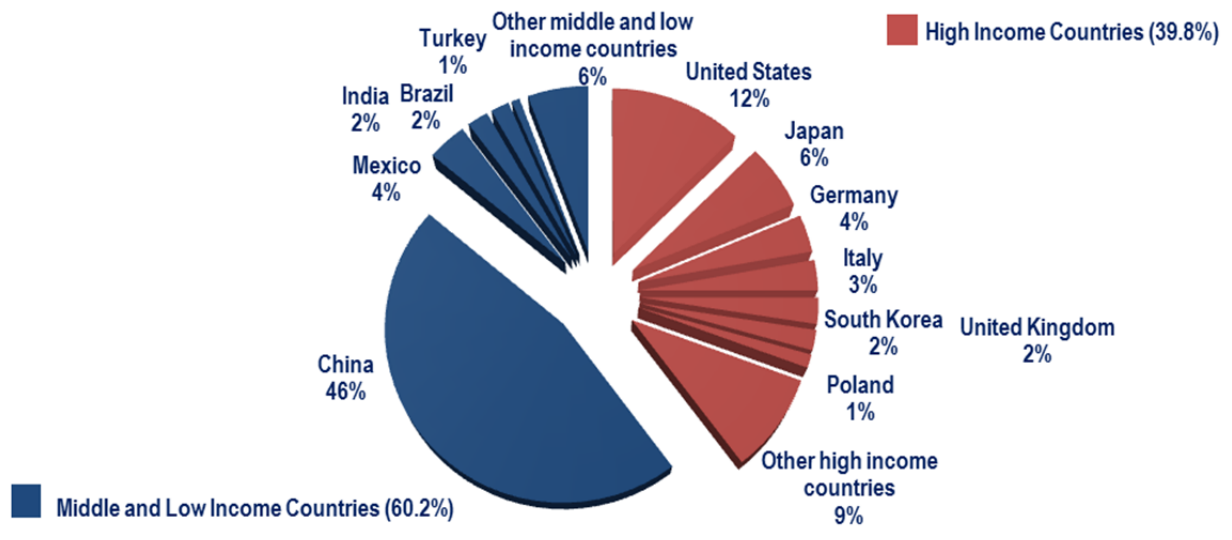
Source: CSIL processing

(\*) 2016: average exchange rate EUR-USD for the period January-September 2016

(\*\*) 2017-2020: exchange rate EUR-USD estimate by IMF

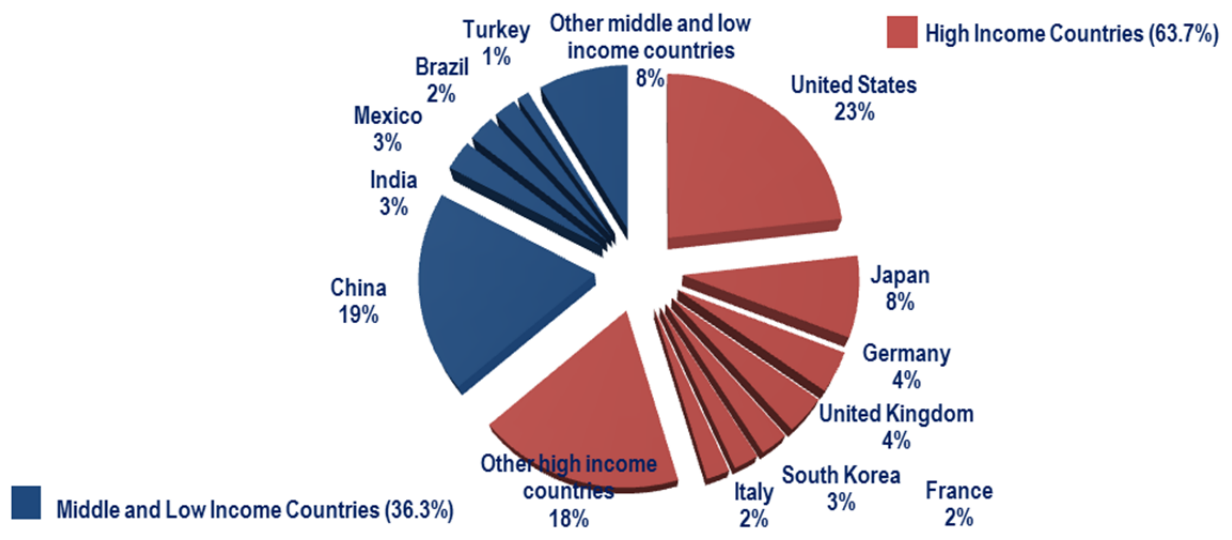


FIGURE 1.1 World production of lighting fixtures, 2015: High Income countries and Middle and Low Income countries. % values



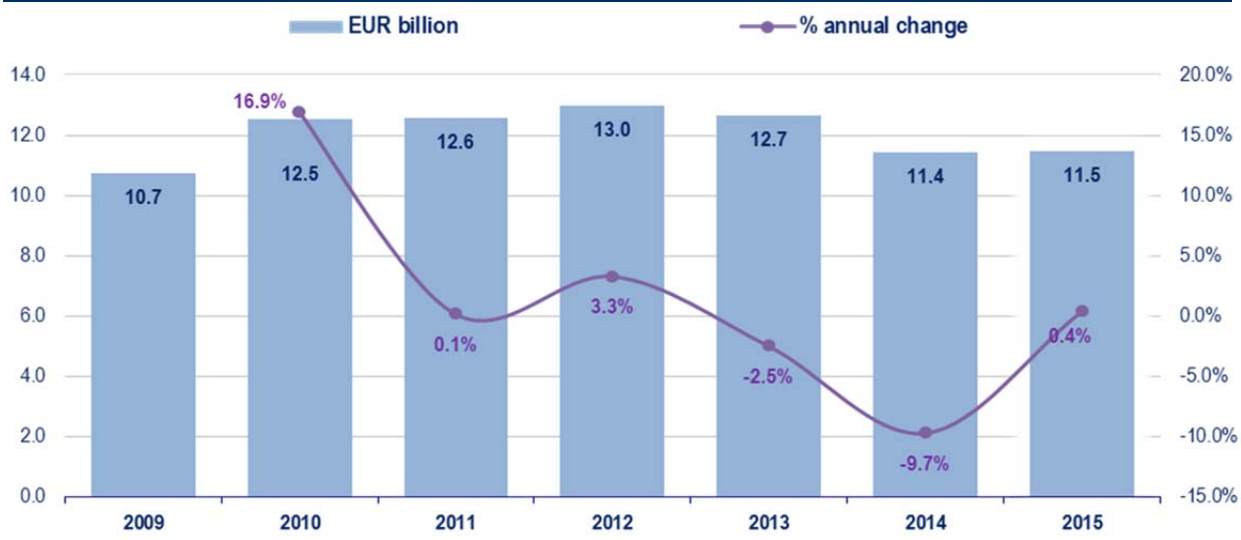
Source: CSIL processing

FIGURE 1.2 World consumption of lighting fixtures, 2015: High Income countries and Middle and Low Income countries. % values



Source: CSIL processing

FIGURE 1.3 World Trade of lamps, 2009-2015. EUR billion and % annual change



Source: CSIL processing on 66 countries available statistics

## 2. Evoluzione della tecnologia LED

Il settore della Illuminazione è stato caratterizzato nei dieci anni passati dal rapido cambio dalle fonti di illuminazione tradizionali ai LED.

Altre sfide ci attendono per i prossimi anni, e proveremo a riassumerle nell'ultimo paragrafo di questo Report.

L'illuminazione LED pesava appena il 5%-6% del mercato mondiale nel periodo 2008-2009.

Nell'anno 2015 la quota raggiunge il 40% e presumibilmente, sempre secondo CSIL, dovrebbe superare il 65% nel 2020.

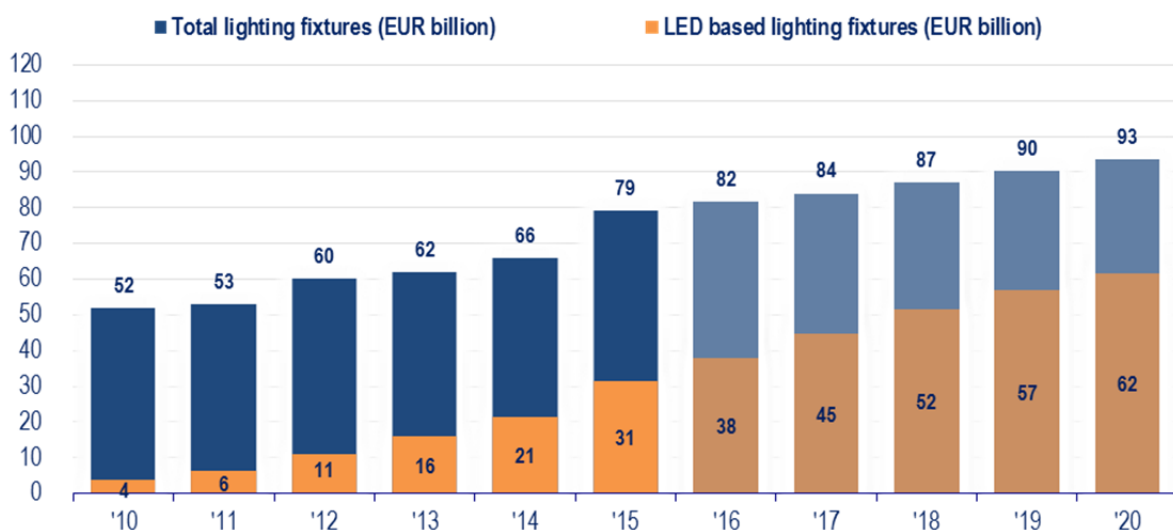
In termini di valore, il mercato LED dell'illuminazione oggi vale circa 35 miliardi di dollari.

La crescita prevista da CSIL per il periodo 2016-2020 si aggira intorno al 4.0%-4.5% ma questo numero sintetico "nasconde" una previsione del 30% per gli apparecchi a fonte luminosa Convenzionale ed una crescita annua del 15% per la illuminazione a LED.

Rispetto a tale dato "medio", la quota del LED per l'illuminazione residenziale è notoriamente minore (ma viceversa maggiore sarà il tasso di penetrazione). La quota già oggi costituita da LED è maggiore per gli Esterni.

I LED hanno profondamente cambiato le prestazioni dei prodotti ma anche la loro morfologia, basti pensare a titolo esemplificativo ai trunking systems per la grande distribuzione ed i magazzini industriali, i pannelli LED per gli uffici, gli undercabinet per l'illuminazione residenziale e per il Retail.

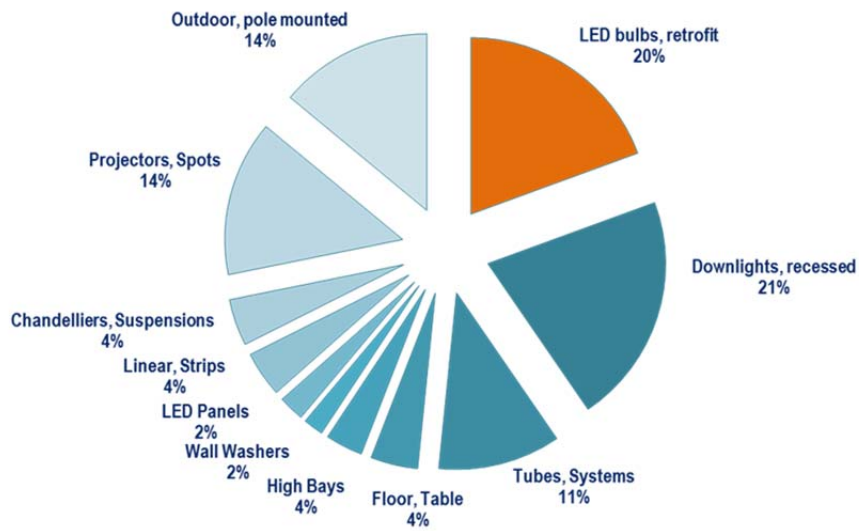
**FIGURE 2.1 Worldwide market. Consumption of total lighting fixtures and LED based lighting fixtures, 2010-2015 estimated data and 2016-2020 forecasts. EUR billion**



Source: CSIL processing

## 2.1 Focus on products: a breakdown of the market

FIGURE 2.2 Worldwide market. Consumption of LED based lighting by main products, 2015. % share in values



Source: CSIL processing data

## 3. Il mercato europeo della illuminazione

### 3.1 Dati di base

Il mercato Europeo degli apparecchi di illuminazione viene valutato pari a circa 14 miliardi di Euro per l'anno 2015, con una crescita del 7,2% rispetto all'anno precedente.

Si tratta per circa 9 miliardi di Euro di illuminazione professionale, cui si somma illuminazione consumer (residenziale) per circa 5 miliardi.

Nel 2015 il segmento di attività maggiormente dinamico è risultato essere quello della illuminazione commerciale, dizione convenzionale che raggruppa l'illuminazione Hospitality, Retail, per Uffici, Entertainment, Arte & Musei, scuole ed altre infrastrutture indoor.

Le esportazioni Europee di apparecchi per illuminazione sono destinate in prima battuta al mercato interno: circa l'80% delle stesse nel 2010, circa il 75% a distanza di cinque anni (2015).

Tutte le altre grandi aree geografiche hanno registrato nel periodo 2010-2015 forti incrementi: oltre il 15% medio annuo l'America, oltre il 10% il Medio Oriente, quasi il 10% medio annuo l'Asia.

**TABLE 3.1 Europe. Technical\* lighting fixtures. Production, international trade and consumption by country, 2015. EUR Million and percentage annual changes**

| Country        | Production   |                 | Exports      |                 | Imports      |                 | Consumption  |                 |
|----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|
|                | EUR Million  | 15/14 % changes | EUR Million  | 15/14 % changes | EUR Million  | 15/14 % changes | EUR Million  | 15/14 % changes |
| Austria        | 383          | -3.8            | 545          | -9.8            | 433          | -8.8            | 271          | 0.7             |
| Belgium        | 213          | -3.4            | 337          | 7.4             | 392          | 15.4            | 269          | 8.7             |
| Denmark        | 262          | 3.4             | 308          | 13.2            | 247          | 16.6            | 201          | 4.1             |
| Finland        | 200          | -5.3            | 140          | 4.4             | 167          | 9.2             | 227          | -1.2            |
| France         | 932          | -0.1            | 529          | 7.1             | 818          | 11.6            | 1,221        | 4.2             |
| Germany        | 2,138        | 7.3             | 2,113        | 3.1             | 1,715        | -0.9            | 1,740        | 3.9             |
| Greece         | 103          | 18.3            | 26           | 4.5             | 58           | 12.5            | 134          | 18.7            |
| Ireland        | 25           | 0.7             | 26           | 8.8             | 95           | 26.4            | 94           | 23.6            |
| Italy          | 1,447        | 5.7             | 1,081        | 9.2             | 517          | 12.9            | 883          | 5.6             |
| Netherlands    | 254          | -0.4            | 668          | 5.7             | 771          | 10.9            | 358          | 12.1            |
| Norway         | 18           | -52.2           | 67           | 8.9             | 281          | 15.4            | 232          | 5.8             |
| Portugal       | 72           | -3.9            | 73           | 0.7             | 70           | 11.7            | 69           | 6.0             |
| Spain          | 423          | -27.8           | 524          | 14.9            | 581          | 60.8            | 481          | -2.2            |
| Sweden         | 235          | 11.6            | 205          | 0.5             | 379          | 13.1            | 409          | 19.7            |
| Switzerland    | 9            | -80.0           | 80           | -4.2            | 413          | 17.5            | 342          | 9.1             |
| United Kingdom | 1,252        | 11.3            | 437          | 14.8            | 1,155        | 20.6            | 1,969        | 15.7            |
| <b>Europe</b>  | <b>7,965</b> | <b>1.8</b>      | <b>7,157</b> | <b>5.3</b>      | <b>8,093</b> | <b>11.8</b>     | <b>8,900</b> | <b>7.7</b>      |

Source: CSIL processing

(\*) commercial + industrial + outdoor lighting fixtures

TABLE 3.2 Europe. Consumption of lighting fixtures by segment, 2014 and 2015. EUR Million and % changes

|              | Lighting fixtures consumption |                  |                 |
|--------------|-------------------------------|------------------|-----------------|
|              | EUR Million 2014              | EUR Million 2015 | 15/14 % changes |
| Residential  | 5,024                         | 5,340            | 6.3             |
| Commercial   | 3,905                         | 4,296            | 10.0            |
| Industrial   | 1,678                         | 1,796            | 7.0             |
| Outdoor      | 2,680                         | 2,809            | 4.8             |
| <b>Total</b> | <b>13,287</b>                 | <b>14,240</b>    | <b>7.2</b>      |

Source: CSIL process

TABLE 3.3 Europe. Exports of lighting fixtures by country of destination, 2010-2015

| Country        | EUR Million    |                |                |                |                |                | % share      |              | % annual changes |            |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|------------------|------------|
|                | 2010           | 2011           | 2012           | 2013           | 2014           | 2015           | 2010         | 2015         | 15/14            | Av. 10/15  |
| Austria        | 650.8          | 749.7          | 720.1          | 882.6          | 980.0          | 905.2          | 9.0          | 9.1          | -7.6             | 6.8        |
| Belgium        | 568.1          | 554.5          | 494.4          | 512.8          | 432.9          | 450.8          | 7.8          | 4.5          | 4.1              | -4.5       |
| Denmark        | 199.9          | 255.8          | 288.8          | 271.9          | 347.2          | 390.7          | 2.8          | 3.9          | 12.6             | 14.3       |
| Finland        | 122.1          | 129.1          | 132.0          | 127.7          | 153.3          | 158.7          | 1.7          | 1.6          | 3.5              | 5.4        |
| France         | 610.0          | 680.0          | 696.3          | 674.2          | 697.6          | 745.8          | 8.4          | 7.5          | 6.9              | 4.1        |
| Germany        | 2,031.9        | 2,259.3        | 2,353.8        | 2,412.6        | 2,628.4        | 2,782.3        | 28.0         | 28.0         | 5.9              | 6.5        |
| Greece         | 28.2           | 32.7           | 64.9           | 30.6           | 39.6           | 38.7           | 0.4          | 0.4          | -2.2             | 6.5        |
| Ireland        | 29.1           | 33.4           | 34.0           | 41.3           | 40.1           | 46.9           | 0.4          | 0.5          | 17.0             | 10.0       |
| Italy          | 1,300.6        | 1,402.9        | 1,423.9        | 1,482.0        | 1,532.7        | 1,633.0        | 17.9         | 16.5         | 6.5              | 4.7        |
| Netherlands    | 470.0          | 554.2          | 632.0          | 722.7          | 756.7          | 812.4          | 6.5          | 8.2          | 7.4              | 11.6       |
| Norway         | 82.7           | 80.0           | 98.1           | 101.9          | 109.7          | 112.7          | 1.1          | 1.1          | 2.7              | 6.4        |
| Portugal       | 68.1           | 81.1           | 92.9           | 93.9           | 100.4          | 102.7          | 0.9          | 1.0          | 2.3              | 8.6        |
| Spain          | 355.3          | 417.6          | 483.1          | 536.8          | 624.2          | 706.1          | 4.9          | 7.1          | 13.1             | 14.7       |
| Sweden         | 272.0          | 279.7          | 311.4          | 316.8          | 322.5          | 324.6          | 3.7          | 3.3          | 0.7              | 3.6        |
| Switzerland    | 89.3           | 102.9          | 96.0           | 105.0          | 106.6          | 103.9          | 1.2          | 1.0          | -2.6             | 3.1        |
| United Kingdom | 380.2          | 444.2          | 513.5          | 488.6          | 496.7          | 605.8          | 5.2          | 6.1          | 22.0             | 9.8        |
| <b>Europe</b>  | <b>7,258.1</b> | <b>8,057.2</b> | <b>8,435.0</b> | <b>8,801.5</b> | <b>9,368.8</b> | <b>9,920.4</b> | <b>100.0</b> | <b>100.0</b> | <b>5.9</b>       | <b>6.4</b> |

Source: CSIL processing of official data

TABLE 3.4 Europe. Exports of lighting fixtures by geographical area of destination, 2010-2015

| Geographical area        | EUR Million    |                |                |                |                |                | % share      |              | % annual changes |            |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|------------------|------------|
|                          | 2010           | 2011           | 2012           | 2013           | 2014           | 2015           | 2010         | 2015         | 15/14            | Av. 10/15  |
| <b>Americas</b>          | 348.0          | 416.4          | 499.3          | 560.6          | 630.9          | 748.4          | 4.8          | 7.5          | 18.6             | 16.6       |
| - North America          | 260.9          | 309.7          | 359.2          | 403.1          | 469.8          | 571.9          | 3.6          | 5.8          | 21.7             | 17.0       |
| - Central-South America  | 87.0           | 106.7          | 140.1          | 157.5          | 161.0          | 176.5          | 1.2          | 1.8          | 9.6              | 15.2       |
| <b>Asia and Pacific</b>  | 491.1          | 542.4          | 623.0          | 616.1          | 666.0          | 747.1          | 6.8          | 7.5          | 12.2             | 8.8        |
| <b>Europe</b>            | 5,838.4        | 6,462.0        | 6,539.0        | 6,799.5        | 7,128.7        | 7,492.1        | 80.4         | 75.5         | 5.1              | 5.1        |
| - European Union (15)    | 4,286.5        | 4,637.8        | 4,660.2        | 4,807.3        | 5,059.8        | 5,443.3        | 59.1         | 54.9         | 7.6              | 4.9        |
| - New EU Members (13)    | 681.3          | 806.9          | 741.5          | 777.0          | 898.2          | 934.5          | 9.4          | 9.4          | 4.0              | 6.5        |
| - Enlarged EU (28)       | 4,967.8        | 5,444.6        | 5,401.7        | 5,584.3        | 5,957.9        | 6,377.8        | 68.4         | 64.3         | 7.0              | 5.1        |
| - Norway and Switzerland | 488.9          | 572.4          | 635.2          | 674.9          | 698.7          | 756.5          | 6.7          | 7.6          | 8.3              | 9.1        |
| - Other Europe           | 381.7          | 445.0          | 502.1          | 540.3          | 472.1          | 357.8          | 5.3          | 3.6          | -24.2            | -1.3       |
| <b>Middle East</b>       | 374.3          | 436.9          | 538.6          | 585.2          | 684.8          | 681.0          | 5.2          | 6.9          | -0.6             | 12.7       |
| <b>Africa</b>            | 205.8          | 199.3          | 234.5          | 236.3          | 255.0          | 248.5          | 2.8          | 2.5          | -2.6             | 3.8        |
| <b>Other Countries</b>   | 0.7            | 0.3            | 0.7            | 3.8            | 3.4            | 3.3            | 0.0          | 0.0          | -0.3             | 38.1       |
| <b>Total</b>             | <b>7,258.1</b> | <b>8,057.2</b> | <b>8,435.0</b> | <b>8,801.5</b> | <b>9,368.8</b> | <b>9,920.4</b> | <b>100.0</b> | <b>100.0</b> | <b>5.9</b>       | <b>6.4</b> |

Source: CSIL processing of official data

TABLE 3.5 Europe. Imports of lighting fixtures by country of origin, 2010-2015

| Country        | EUR Million    |                |                 |                 |                 |                 | % share      |              | % annual changes |            |
|----------------|----------------|----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------|------------------|------------|
|                | 2010           | 2011           | 2012            | 2013            | 2014            | 2015            | 2010         | 2015         | 15/14            | Av. 10/15  |
| Austria        | 566.7          | 661.5          | 664.6           | 744.6           | 855.7           | 842.3           | 6.5          | 6.3          | -1.6             | 8.2        |
| Belgium        | 586.1          | 631.0          | 637.3           | 679.2           | 609.4           | 657.3           | 6.7          | 4.9          | 7.9              | 2.3        |
| Denmark        | 226.5          | 265.3          | 278.9           | 289.7           | 351.7           | 414.8           | 2.6          | 3.1          | 18.0             | 12.9       |
| Finland        | 203.6          | 217.2          | 238.3           | 223.6           | 236.4           | 251.6           | 2.3          | 1.9          | 6.4              | 4.3        |
| France         | 1,195.7        | 1,240.2        | 1,304.6         | 1,297.4         | 1,337.0         | 1,494.3         | 13.7         | 11.2         | 11.8             | 4.6        |
| Germany        | 1,767.8        | 1,966.1        | 2,231.2         | 2,398.0         | 2,764.9         | 2,859.4         | 20.2         | 21.4         | 3.4              | 10.1       |
| Greece         | 111.7          | 84.8           | 61.9            | 64.2            | 81.8            | 91.0            | 1.3          | 0.7          | 11.3             | -4.0       |
| Ireland        | 91.8           | 84.5           | 88.3            | 92.6            | 116.3           | 151.0           | 1.0          | 1.1          | 29.9             | 10.5       |
| Italy          | 588.9          | 639.9          | 621.9           | 629.4           | 742.4           | 854.4           | 6.7          | 6.4          | 15.1             | 7.7        |
| Netherlands    | 663.9          | 795.1          | 962.9           | 977.9           | 976.1           | 1,090.9         | 7.6          | 8.2          | 11.8             | 10.4       |
| Norway         | 275.1          | 310.2          | 368.5           | 392.9           | 427.1           | 477.4           | 3.1          | 3.6          | 11.8             | 11.7       |
| Portugal       | 129.9          | 124.8          | 102.6           | 101.3           | 121.6           | 140.7           | 1.5          | 1.1          | 15.7             | 1.6        |
| Spain          | 510.1          | 503.3          | 457.3           | 458.0           | 657.9           | 927.6           | 5.8          | 7.0          | 41.0             | 12.7       |
| Sweden         | 379.7          | 413.7          | 460.0           | 483.2           | 544.0           | 632.2           | 4.3          | 4.7          | 16.2             | 10.7       |
| Switzerland    | 414.7          | 479.9          | 517.2           | 557.1           | 566.8           | 647.8           | 4.7          | 4.9          | 14.3             | 9.3        |
| United Kingdom | 1,043.1        | 1,022.4        | 1,191.2         | 1,295.4         | 1,535.9         | 1,812.6         | 11.9         | 13.6         | 18.0             | 11.7       |
| <b>Europe</b>  | <b>8,755.3</b> | <b>9,439.8</b> | <b>10,186.7</b> | <b>10,684.5</b> | <b>11,925.0</b> | <b>13,345.5</b> | <b>100.0</b> | <b>100.0</b> | <b>11.9</b>      | <b>8.8</b> |

Source: CSIL processing of official data

TABLE 3.6 Europe. Imports of lighting fixtures by geographical area of origin, 2010-2015

| Geographical area        | EUR Million    |                |                 |                 |                 |                 | % share      |              | % annual changes |            |
|--------------------------|----------------|----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------|------------------|------------|
|                          | 2010           | 2011           | 2012            | 2013            | 2014            | 2015            | 2010         | 2015         | 15/14            | Av. 10/15  |
| <b>Americas</b>          | 139.3          | 153.6          | 169.7           | 170.7           | 198.4           | 231.2           | 1.6          | 1.7          | 16.5             | 10.7       |
| - North America          | 128.9          | 141.7          | 161.4           | 164.4           | 190.0           | 223.5           | 1.5          | 1.7          | 17.6             | 11.6       |
| - Central-South America  | 10.4           | 11.9           | 8.3             | 6.3             | 8.4             | 7.7             | 0.1          | 0.1          | -8.1             | -5.7       |
| <b>Asia and Pacific</b>  | 3,900.9        | 4,011.9        | 4,682.8         | 4,949.7         | 5,735.6         | 6,624.8         | 44.6         | 49.6         | 15.5             | 11.2       |
| <b>Europe</b>            | 4,684.7        | 5,241.3        | 5,299.9         | 5,533.9         | 5,955.8         | 6,453.7         | 53.5         | 48.4         | 8.4              | 6.6        |
| - European Union (15)    | 4,024.6        | 4,455.7        | 4,443.0         | 4,618.3         | 4,841.3         | 5,193.8         | 46.0         | 38.9         | 7.3              | 5.2        |
| - New EU Members (13)    | 517.1          | 622.4          | 689.7           | 747.5           | 929.2           | 1,051.2         | 5.9          | 7.9          | 13.1             | 15.2       |
| - Enlarged EU (28)       | 4,541.7        | 5,078.2        | 5,132.7         | 5,365.8         | 5,770.4         | 6,245.0         | 51.9         | 46.8         | 8.2              | 6.6        |
| - Norway and Switzerland | 102.6          | 121.1          | 116.0           | 117.7           | 115.0           | 120.7           | 1.2          | 0.9          | 5.0              | 3.3        |
| - Other Europe           | 40.3           | 42.0           | 51.2            | 50.3            | 70.4            | 88.0            | 0.5          | 0.7          | 24.9             | 16.9       |
| <b>Middle East</b>       | 5.8            | 5.9            | 7.4             | 7.2             | 8.7             | 11.0            | 0.1          | 0.1          | 25.2             | 13.5       |
| <b>Africa</b>            | 24.3           | 27.0           | 26.7            | 22.4            | 25.0            | 24.7            | 0.3          | 0.2          | -1.3             | 0.3        |
| <b>Other Countries</b>   | 0.3            | 0.2            | 0.2             | 0.6             | 1.4             | 0.2             | 0.0          | 0.0          | n.s.             | -7.5       |
| <b>Total</b>             | <b>8,755.3</b> | <b>9,439.8</b> | <b>10,186.7</b> | <b>10,684.5</b> | <b>11,925.0</b> | <b>13,345.5</b> | <b>100.0</b> | <b>100.0</b> | <b>11.9</b>      | <b>8.8</b> |

Source: CSIL processing of official data

TABLE 3.7 Europe. Lighting fixtures. Technical segment. Sales breakdown by distribution channel by country, 2015. Percentage shares in value

| Country        | %                         |             |            |          |             |            | Total      |
|----------------|---------------------------|-------------|------------|----------|-------------|------------|------------|
|                | Contract/<br>direct sales | Specialists | Lifestyle* | DIY      | Wholesalers | E-Commerce |            |
| Austria        | 25                        | 40          | 3          | 2        | 29          | 1          | 100        |
| Belgium        | 36                        | 30          | 2          | 1        | 29          | 2          | 100        |
| Denmark        | 30                        | 25          | 9          | 2        | 30          | 4          | 100        |
| Finland        | 18                        | 30          | 7          | 2        | 39          | 4          | 100        |
| France         | 34                        | 21          | 8          | 3        | 32          | 2          | 100        |
| Germany        | 28                        | 15          | 1          | 7        | 47          | 2          | 100        |
| Greece         | 24                        | 32          | 4          | 0        | 40          | 0          | 100        |
| Ireland        | 25                        | 30          | 2          | 2        | 40          | 1          | 100        |
| Italy          | 20                        | 30          | 6          | 2        | 41          | 1          | 100        |
| Netherlands    | 30                        | 33          | 10         | 1        | 24          | 2          | 100        |
| Norway         | 26                        | 26          | 7          | 2        | 35          | 4          | 100        |
| Portugal       | 30                        | 35          | 3          | 0        | 32          | 0          | 100        |
| Spain          | 24                        | 25          | 4          | 1        | 44          | 2          | 100        |
| Sweden         | 31                        | 18          | 10         | 5        | 32          | 4          | 100        |
| Switzerland    | 33                        | 35          | 8          | 3        | 20          | 1          | 100        |
| United Kingdom | 26                        | 20          | 2          | 4        | 45          | 3          | 100        |
| <b>Europe</b>  | <b>28</b>                 | <b>23</b>   | <b>5</b>   | <b>4</b> | <b>39</b>   | <b>2</b>   | <b>100</b> |

Source: CSIL processing

(\*) Lifestyle includes: small/medium furniture and lighting fixtures retailers, furniture & furnishings chains, department stores



**TABLE 3.8 Europe. Commercial lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                 | EUR million  |              |              | % share in value |              |              |
|-----------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                 | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Hospitality     | 1,320        | 1,068        | 1,158        | 34.4             | 25.1         | 23.1         |
| Office          | 982          | 1,350        | 1,564        | 25.6             | 31.7         | 31.1         |
| Retail          | 1,104        | 1,327        | 1,563        | 28.8             | 31.2         | 31.1         |
| Art/Museum      | 111          | 121          | 159          | 2.9              | 2.8          | 3.2          |
| Entertainment   | 157          | 149          | 186          | 4.1              | 3.5          | 3.7          |
| Infrastructures | 161          | 239          | 392          | 4.2              | 5.6          | 7.8          |
| <b>Total</b>    | <b>3,834</b> | <b>4,255</b> | <b>5,023</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing

**TABLE 3.9 Europe. Outdoor lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                                    | EUR million  |              |              | % share in value |              |              |
|------------------------------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                                    | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Residential outdoor                | 536          | 591          | 500          | 20.0             | 20.0         | 15.2         |
| Urban landscape                    | 915          | 1,008        | 1,103        | 34.3             | 34.0         | 33.6         |
| Christmas and event lighting       | 108          | 127          | 134          | 4.1              | 4.3          | 4.1          |
| Streets and major roads            | 687          | 751          | 944          | 25.7             | 25.4         | 28.7         |
| Tunnel                             | 112          | 131          | 146          | 4.2              | 4.4          | 4.4          |
| Sport plants and other large areas | 314          | 352          | 460          | 11.7             | 11.9         | 14.0         |
| <b>Total</b>                       | <b>2,672</b> | <b>2,959</b> | <b>3,286</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing

## 4. Posizionamento dell'Italia

### 4.1 Una visione di insieme

Le imprese italiane competono all'incirca nel primo quartile del mercato mondiale della illuminazione: un mercato aggredibile, indicativamente, di 20 miliardi di euro, su 80 totali.

Con una produzione nazionale di circa 2,3 miliardi, la quota di mercato (stimata su questo aggregato specifico) risulta nell'ordine dell'11%-12%, in concorrenza con le migliori produzioni europee, americane, giapponesi, cinesi.

Un mercato che si ripartisce, in termini di larga massima, in tre fette di eguale entità fra Europa, Nord America e Resto del Mondo.

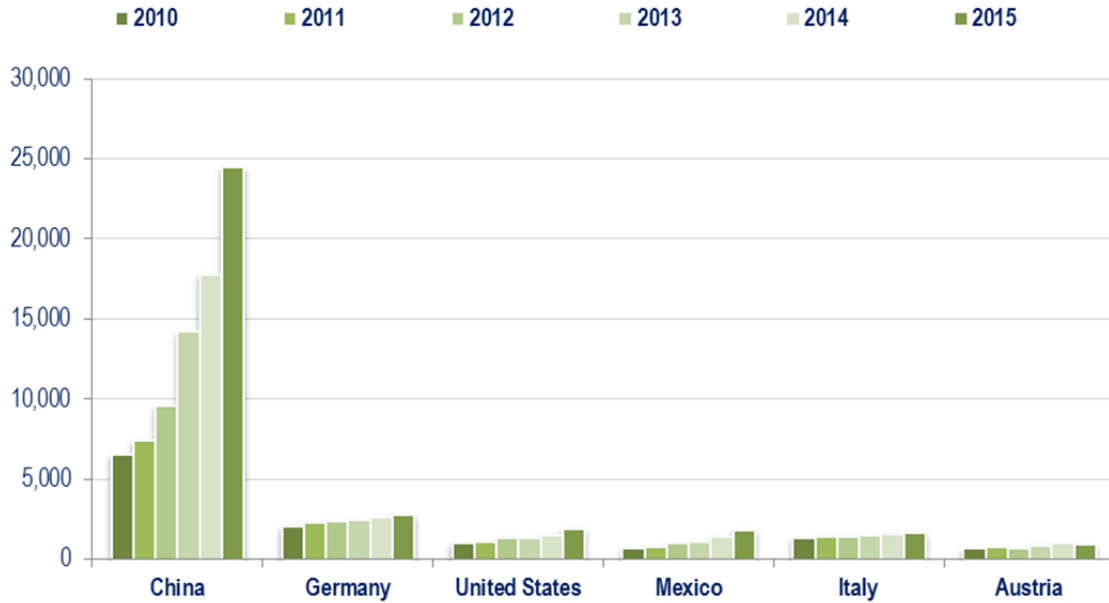
Per un aggregato di minori dimensioni (il puro Top End, il primo decile del mercato) Csil stima che la crescita complessiva negli ultimi cinque anni (2010-2015) sia stata nell'ordine del 40%, vale a dire circa il 7% medio annuo (in euro) in valore.

Un tasso superiore rispetto al tasso medio del mercato (4,5%, 28% complessivo).

Abbiamo provato a confrontare questi tassi di crescita con quelli di un gruppo di imprese leader italiane e la crescita media si attesta più o meno dalle parti del tasso di crescita complessivo.

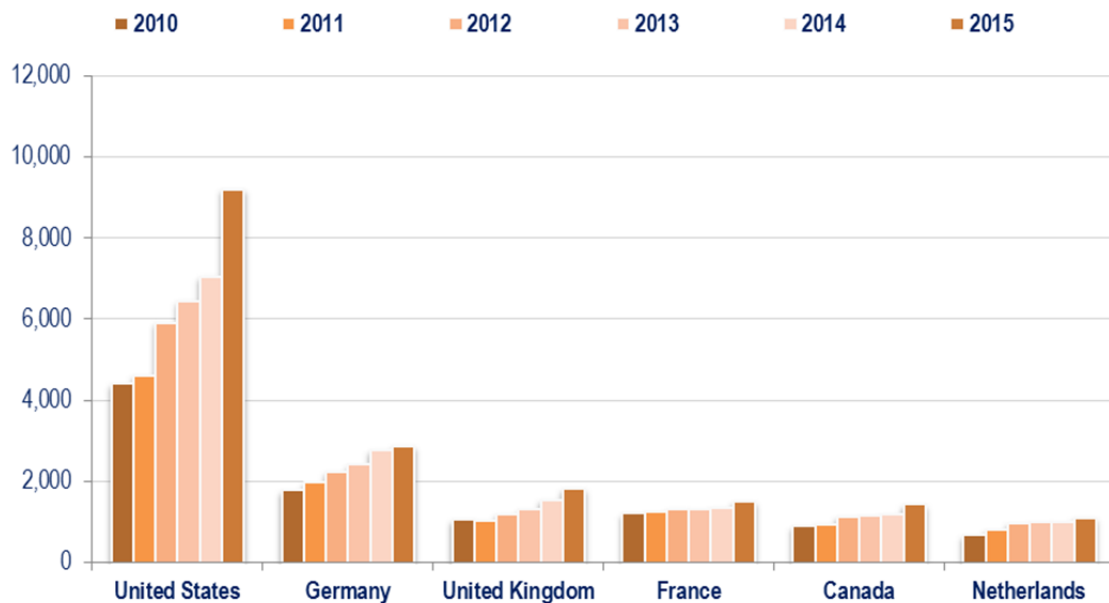
Vale a dire, si vanno perdendo opportunità nell'alto gamma.

FIGURE 4.1 Six major exporters of lighting fixtures. Exports 2010-2015. EUR million



Source: CSIL processing

FIGURE 4.2 Six major importers of lighting fixtures. Imports 2010-2015. EUR million



Source: CSIL processing

TABLE 4.1 Lighting fixtures. Main destination of exports: focus on 66 countries, 2015. % values

|              | Exports<br>EUR Mn | Destination 1 |    | Destination 2 |    | Destination 3 |    | Destination 4 |    | Destination 5 |   |
|--------------|-------------------|---------------|----|---------------|----|---------------|----|---------------|----|---------------|---|
|              |                   | Country       | %  | Country       | %  | Country       | %  | Country       | %  | Country       | % |
| China        | 24,439            | USA           | 27 | Germany       | 6  | UK            | 5  | Netherlands   | 3  | India         | 3 |
| Germany      | 2,782             | Austria       | 12 | France        | 10 | Switzerland   | 8  | Poland        | 7  | USA           | 7 |
| USA          | 1,891             | Canada        | 42 | Mexico        | 19 | China         | 3  | UK            | 2  | Australia     | 2 |
| Mexico       | 1,845             | USA           | 98 | Canada        | 1  | Colombia      | 0  | Guatemala     | 0  | Costa Rica    | 0 |
| Italy        | 1,633             | Germany       | 11 | France        | 11 | UK            | 6  | USA           | 5  | Russia        | 4 |
| Austria      | 905               | Germany       | 33 | Switzerland   | 10 | Slovakia      | 7  | Hungary       | 6  | UK            | 6 |
| Netherlands  | 812               | Germany       | 28 | Belgium       | 11 | USA           | 8  | France        | 8  | UK            | 7 |
| France       | 746               | Germany       | 9  | Spain         | 9  | Italy         | 9  | UK            | 8  | Netherlands   | 7 |
| South Korea  | 718               | Japan         | 20 | USA           | 15 | China         | 12 | Slovenia      | 11 | Slovakia      | 8 |
| Spain        | 706               | France        | 16 | UK            | 12 | Germany       | 10 | Italy         | 7  | Portugal      | 6 |
| Poland       | 683               | Germany       | 25 | France        | 9  | Netherlands   | 8  | Hungary       | 5  | Czech Rep.    | 4 |
| UK           | 606               | Ireland       | 11 | Netherlands   | 9  | France        | 8  | Germany       | 7  | USA           | 7 |
| Canada       | 500               | USA           | 93 | United A. E.  | 1  | Germany       | 1  | UK            | 1  | Saudi Arabia  | 1 |
| Belgium      | 451               | France        | 41 | Netherlands   | 17 | Germany       | 10 | UK            | 3  | Italy         | 2 |
| Denmark      | 391               | Sweden        | 16 | Germany       | 13 | Norway        | 12 | UK            | 9  | USA           | 9 |
| India        | 367               | USA           | 30 | Germany       | 15 | UK            | 8  | Netherlands   | 7  | France        | 5 |
| Hungary      | 354               | Germany       | 15 | Poland        | 11 | France        | 10 | Italy         | 7  | Austria       | 6 |
| Taiwan       | 330               | USA           | 49 | Japan         | 12 | Germany       | 5  | China         | 5  | UK            | 2 |
| Czech Rep.   | 325               | Germany       | 18 | Slovakia      | 10 | Italy         | 5  | Poland        | 5  | Austria       | 5 |
| Sweden       | 325               | Norway        | 34 | Finland       | 15 | Denmark       | 12 | Germany       | 8  | UK            | 6 |
| Slovakia     | 243               | Hungary       | 28 | Germany       | 22 | Czech Rep.    | 8  | Austria       | 6  | Poland        | 5 |
| Turkey       | 223               | Turkmenistan  | 11 | Azerbaijan    | 6  | Germany       | 5  | Iraq          | 5  | Saudi Arabia  | 5 |
| Malaysia     | 177               | Singapore     | 16 | USA           | 15 | Australia     | 10 | Poland        | 7  | Japan         | 6 |
| Finland      | 159               | Estonia       | 21 | France        | 11 | Germany       | 11 | Sweden        | 8  | Hong Kong     | 5 |
| Singapore    | 139               | Indonesia     | 20 | China         | 15 | Hong Kong     | 10 | Malaysia      | 10 | Japan         | 5 |
| Norway       | 113               | Sweden        | 24 | South Korea   | 11 | Germany       | 8  | Singapore     | 7  | Denmark       | 7 |
| Switzerland  | 104               | Germany       | 38 | France        | 14 | Austria       | 9  | Italy         | 8  | Belgium       | 5 |
| Portugal     | 103               | Angola        | 20 | Spain         | 18 | France        | 14 | Mozambique    | 6  | UK            | 5 |
| United A. E. | 92                |               |    |               |    |               |    |               |    |               |   |
| Romania      | 90                | Germany       | 63 | France        | 16 | Netherlands   | 4  | Italy         | 3  | Austria       | 1 |
| Thailand     | 87                | Japan         | 32 | USA           | 8  | Australia     | 6  | Myanmar       | 6  | Singapore     | 4 |
| Estonia      | 86                | Finland       | 38 | Norway        | 22 | Sweden        | 14 | Germany       | 9  | Russia        | 4 |
| Japan        | 86                | USA           | 26 | China         | 12 | Singapore     | 11 | South Korea   | 8  | Taiwan        | 7 |
| Lithuania    | 73                | Russia        | 41 | Germany       | 7  | Belarus       | 6  | Latvia        | 5  | Kazakhstan    | 5 |
| Slovenia     | 72                | Slovakia      | 20 | Hungary       | 11 | Croatia       | 11 | Austria       | 9  | Germany       | 7 |
| Australia    | 69                | New Zealand   | 23 | USA           | 15 | Papua N. G.   | 9  | Canada        | 4  | Macau         | 4 |
| Bulgaria     | 65                | Italy         | 14 | UK            | 13 | Greece        | 7  | Spain         | 6  | Germany       | 6 |
| Vietnam      | 65                | USA           | 21 | South Korea   | 9  | Japan         | 9  | China         | 8  | France        | 8 |
| Russia       | 60                | Kazakhstan    | 36 | Belarus       | 32 | Germany       | 5  | India         | 4  | Ukraine       | 4 |
| Philippines  | 57                | USA           | 60 | Japan         | 13 | Germany       | 8  | UK            | 3  | Australia     | 2 |
| South Africa | 53                | Namibia       | 29 | Botswana      | 11 | Zambia        | 9  | Zimbabwe      | 8  | Mozambique    | 5 |
| Ireland      | 47                | UK            | 82 | Germany       | 3  | Saudi Arabia  | 2  | France        | 2  | Italy         | 1 |
| Indonesia    | 45                | Japan         | 37 | USA           | 31 | Singapore     | 14 | Vietnam       | 2  | Germany       | 2 |
| Greece       | 39                | Bulgaria      | 21 | Norway        | 8  | Romania       | 7  | United A. E.  | 6  | Cyprus        | 5 |
| New Zealand  | 27                | Australia     | 41 | USA           | 12 | UK            | 9  | Netherlands   | 8  | Fiji          | 6 |
| Belarus      | 24                | Russia        | 72 | Germany       | 10 | Romania       | 10 | Kazakhstan    | 3  | Ukraine       | 1 |
| Egypt        | 23                | United A. E.  | 20 | Saudi Arabia  | 18 | Qatar         | 9  | Ivory Coast   | 7  | Kuwait        | 5 |
| Ukraine      | 22                | Russia        | 68 | Poland        | 18 | Belarus       | 4  | Georgia       | 1  | Hungary       | 1 |
| Brazil       | 19                | Paraguay      | 21 | USA           | 14 | Colombia      | 9  | Bolivia       | 7  | Chile         | 7 |
| Tunisia      | 18                | Italy         | 44 | France        | 29 | Germany       | 6  | Libya         | 5  | Algeria       | 4 |
| Croatia      | 16                | Slovenia      | 34 | Germany       | 9  | Austria       | 8  | Bosnia Herz.  | 7  | Italy         | 6 |
| Saudi Arabia | 14                | United A. E.  | 27 | Bahrain       | 26 | Qatar         | 15 | Slovenia      | 6  | China         | 4 |
| Colombia     | 13                | Peru          | 22 | Ecuador       | 22 | Panama        | 19 | Costa Rica    | 7  | Guatemala     | 6 |
| Morocco      | 12                | Senegal       | 14 | Italy         | 9  | Mauritania    | 8  | Burkina Faso  | 8  | Gabon         | 7 |
| Bahrain      | 11                | Saudi Arabia  | 90 | Qatar         | 4  | United A. E.  | 4  | Kuwait        | 1  | Jordan        | 0 |
| Israel       | 11                | USA           | 31 | Netherlands   | 8  | Argentina     | 8  | Ukraine       | 6  | South Africa  | 4 |
| Argentina    | 8                 | Uruguay       | 32 | Paraguay      | 20 | Chile         | 18 | Bolivia       | 5  | Brazil        | 3 |
| Lebanon      | 7                 | Saudi Arabia  | 12 | United A. E.  | 12 | Germany       | 9  | Congo         | 6  | Bahrain       | 6 |
| Jordan       | 6                 | Iraq          | 3  | United A. E.  | 3  | Saudi Arabia  | 3  | Kuwait        | 2  | USA           | 1 |
| Chile        | 6                 | Bolivia       | 44 | Peru          | 23 | Paraguay      | 15 | Brazil        | 4  | Argentina     | 3 |
| Qatar        | 2                 | United A. E.  | 38 | Germany       | 12 | France        | 10 | Saudi Arabia  | 9  | Spain         | 4 |
| Kuwait       | 1                 | Belgium       | 34 | United A. E.  | 31 | Saudi Arabia  | 10 | Oman          | 6  | Iraq          | 6 |
| Oman         | 1                 | Somalia       | 50 | United A. E.  | 43 | Saudi Arabia  | 3  | India         | 1  | UK            | 1 |
| Kazakhstan   | 1                 | Uzbekistan    | 26 | Czech Rep.    | 25 | Tajikistan    | 19 | Kyrgyzstan    | 16 | UK            | 8 |
| Venezuela    | 1                 | Cuba          | 92 | USA           | 3  | Colombia      | 1  | Dominican R   | 1  | Aruba         | 1 |
| Algeria      | 0                 | France        | 50 | Morocco       | 49 | India         | 0  | Mexico        | 0  | Tunisia       | 0 |

Source: CSIL processing of official data

For the United Arab Emirates official data on destination of exports are not available

TABLE 4.2 Lighting fixtures. Main origin of imports: focus on 66 countries, 2015. % values

|              | Imports<br>EUR Mn | Origin 1     |    | Origin 2    |    | Origin 3    |    | Origin 4          |    | Origin 5    |    |
|--------------|-------------------|--------------|----|-------------|----|-------------|----|-------------------|----|-------------|----|
|              |                   | Country      | %  | Country     | %  | Country     | %  | Country           | %  | Country     | %  |
| USA          | 9,188             | China        | 64 | Mexico      | 19 | Canada      | 5  | Taiwan            | 2  | Germany     | 2  |
| Germany      | 2,859             | China        | 52 | Netherlands | 8  | Austria     | 7  | Poland            | 6  | Italy       | 5  |
| UK           | 1,813             | China        | 60 | Germany     | 6  | Spain       | 4  | Italy             | 3  | USA         | 3  |
| France       | 1,494             | China        | 32 | Germany     | 15 | Italy       | 10 | Belgium           | 9  | Spain       | 6  |
| Canada       | 1,417             | China        | 51 | USA         | 30 | Mexico      | 12 | Germany           | 1  | Italy       | 1  |
| Netherlands  | 1,091             | China        | 60 | Germany     | 7  | Hong Kong   | 4  | France            | 4  | Poland      | 3  |
| United A. E. | 942               | China        | 68 | Italy       | 5  | Germany     | 5  | UK                | 4  | USA         | 3  |
| Spain        | 928               | China        | 41 | Italy       | 24 | France      | 9  | Germany           | 8  | UK          | 3  |
| Japan        | 885               | China        | 71 | South Korea | 5  | Thailand    | 4  | Taiwan            | 4  | USA         | 4  |
| India        | 881               | China        | 86 | Germany     | 3  | South Korea | 2  | Sri Lanka         | 2  | Italy       | 1  |
| Italy        | 854               | China        | 48 | Germany     | 12 | France      | 7  | Austria           | 6  | Spain       | 5  |
| Austria      | 842               | Germany      | 42 | China       | 27 | Italy       | 6  | South Korea       | 5  | Poland      | 3  |
| Australia    | 839               | China        | 71 | USA         | 5  | Germany     | 4  | Italy             | 2  | UK          | 2  |
| Mexico       | 671               | China        | 52 | USA         | 34 | Italy       | 3  | Spain             | 2  | Germany     | 2  |
| Belgium      | 657               | China        | 39 | Germany     | 15 | Netherlands | 15 | France            | 5  | Austria     | 5  |
| Vietnam      | 656               | China        | 85 | South Korea | 6  | Taiwan      | 2  | Germany           | 1  | Singapore   | 1  |
| Switzerland  | 648               | Germany      | 33 | China       | 26 | Italy       | 12 | Austria           | 9  | France      | 4  |
| Sweden       | 632               | China        | 46 | Germany     | 11 | Denmark     | 7  | UK                | 5  | Poland      | 5  |
| South Korea  | 589               | China        | 69 | Germany     | 5  | USA         | 5  | Norway            | 5  | Japan       | 4  |
| Russia       | 584               | China        | 46 | Italy       | 12 | Germany     | 9  | Lithuania         | 5  | Poland      | 4  |
| Poland       | 576               | China        | 44 | Germany     | 24 | Netherlands | 4  | Italy             | 4  | Hungary     | 4  |
| Saudi Arabia | 489               | China        | 49 | Italy       | 9  | USA         | 7  | Germany           | 5  | UK          | 4  |
| Norway       | 477               | China        | 42 | Sweden      | 11 | Germany     | 8  | Denmark           | 6  | Italy       | 5  |
| Turkey       | 457               | China        | 77 | Germany     | 4  | Italy       | 4  | Poland            | 2  | Spain       | 2  |
| Denmark      | 415               | China        | 40 | Germany     | 12 | Sweden      | 11 | Italy             | 6  | Spain       | 4  |
| Hungary      | 334               | Austria      | 20 | Slovakia    | 17 | China       | 17 | Poland            | 16 | Germany     | 7  |
| China        | 310               | Taiwan       | 21 | China       | 16 | USA         | 14 | Germany           | 12 | Japan       | 7  |
| Singapore    | 310               | China        | 39 | Malaysia    | 11 | Germany     | 8  | USA               | 7  | Italy       | 5  |
| Slovakia     | 272               | Slovenia     | 34 | Austria     | 21 | Czech Rep.  | 10 | Germany           | 8  | Hungary     | 7  |
| Finland      | 252               | China        | 25 | Estonia     | 18 | Sweden      | 18 | Germany           | 11 | Poland      | 5  |
| Czech Rep.   | 241               | Germany      | 20 | China       | 20 | Poland      | 12 | Slovakia          | 8  | Italy       | 8  |
| Thailand     | 223               | China        | 78 | Germany     | 3  | Malaysia    | 2  | USA               | 2  | South Korea | 2  |
| Brazil       | 209               | China        | 70 | USA         | 7  | Hong Kong   | 4  | Mexico            | 3  | Denmark     | 2  |
| Israel       | 190               | China        | 52 | Italy       | 8  | Hong Kong   | 7  | USA               | 5  | Germany     | 5  |
| Qatar        | 183               | China        | 24 | Italy       | 20 | Germany     | 9  | USA               | 8  | UK          | 7  |
| Malaysia     | 182               | China        | 77 | USA         | 3  | South Korea | 3  | Singapore         | 2  | Italy       | 2  |
| Chile        | 171               | China        | 78 | USA         | 5  | Spain       | 4  | Germany           | 2  | South Korea | 2  |
| New Zealand  | 159               | China        | 59 | Australia   | 9  | USA         | 6  | Italy             | 5  | Germany     | 4  |
| Romania      | 151               | China        | 32 | Germany     | 14 | Hungary     | 10 | France            | 7  | Italy       | 6  |
| Ireland      | 151               | UK           | 40 | China       | 36 | Germany     | 5  | Italy             | 4  | Poland      | 2  |
| South Africa | 149               | China        | 72 | Germany     | 3  | Italy       | 3  | Malaysia          | 3  | Czech Rep.  | 2  |
| Portugal     | 141               | Spain        | 35 | China       | 16 | Italy       | 10 | Germany           | 9  | Netherlands | 7  |
| Taiwan       | 117               | China        | 75 | USA         | 5  | Italy       | 4  | Japan             | 4  | Germany     | 2  |
| Ukraine      | 117               | China        | 57 | Italy       | 14 | Poland      | 7  | Germany           | 4  | Russia      | 3  |
| Kuwait       | 109               | China        | 37 | Germany     | 12 | Italy       | 9  | UK                | 7  | USA         | 6  |
| Egypt        | 107               | China        | 59 | Italy       | 12 | Germany     | 8  | Spain             | 2  | Poland      | 2  |
| Indonesia    | 100               | China        | 65 | Singapore   | 7  | Malaysia    | 4  | Germany           | 3  | Japan       | 3  |
| Greece       | 91                | China        | 54 | Italy       | 15 | Germany     | 6  | Spain             | 4  | Bulgaria    | 3  |
| Morocco      | 89                | China        | 49 | Italy       | 12 | Spain       | 11 | France            | 11 | Germany     | 3  |
| Colombia     | 84                | China        | 63 | USA         | 11 | Spain       | 6  | Germany           | 3  | Mexico      | 3  |
| Philippines  | 79                | China        | 71 | Hong Kong   | 5  | Germany     | 4  | Taiwan            | 3  | USA         | 3  |
| Slovenia     | 78                | China        | 30 | Italy       | 13 | Austria     | 12 | Germany           | 11 | Croatia     | 10 |
| Algeria      | 75                | China        | 49 | Italy       | 11 | Germany     | 8  | Spain             | 6  | France      | 6  |
| Bulgaria     | 72                | China        | 51 | Greece      | 11 | Germany     | 7  | Poland            | 5  | Turkey      | 5  |
| Oman         | 72                | United A. E. | 37 | China       | 18 | UK          | 8  | Italy             | 8  | Germany     | 5  |
| Lithuania    | 71                | China        | 22 | Italy       | 21 | Germany     | 12 | Poland            | 11 | Czech Rep.  | 6  |
| Argentina    | 68                | China        | 69 | USA         | 12 | Malaysia    | 4  | South Korea       | 3  | Germany     | 2  |
| Lebanon      | 64                | China        | 55 | Italy       | 16 | Spain       | 6  | Germany           | 6  | France      | 3  |
| Croatia      | 63                | Germany      | 17 | China       | 17 | Italy       | 16 | Austria           | 13 | Hungary     | 11 |
| Estonia      | 63                | Finland      | 31 | China       | 15 | Germany     | 9  | Poland            | 7  | Norway      | 6  |
| Jordan       | 60                | China        | 69 | Italy       | 8  | Turkey      | 5  | Germany           | 3  | Spain       | 3  |
| Venezuela    | 60                | China        | 66 | USA         | 15 | Panama      | 6  | British Virgin I. | 3  | Spain       | 2  |
| Kazakhstan   | 47                | China        | 50 | Turkey      | 9  | Italy       | 8  | South Korea       | 5  | UK          | 5  |
| Belarus      | 47                | Russia       | 46 | China       | 25 | Italy       | 7  | Poland            | 5  | Turkey      | 2  |
| Bahrain      | 33                | China        | 45 | Italy       | 11 | Germany     | 5  | UK                | 4  | USA         | 4  |
| Tunisia      | 23                | China        | 44 | France      | 15 | Italy       | 12 | Spain             | 7  | Germany     | 6  |

Source: CSIL processing of official data

TABLE 4.3 World trade balance for lighting fixtures 2010-2015: focus on 66 countries. EUR million

|                      | EUR Million   |             |             |              |              |              |
|----------------------|---------------|-------------|-------------|--------------|--------------|--------------|
|                      | 2010          | 2011        | 2012        | 2013         | 2014         | 2015         |
| China                | 6,357         | 7,264       | 9,397       | 14,008       | 17,488       | 24,129       |
| Mexico               | 453           | 450         | 642         | 692          | 868          | 1,174        |
| Italy                | 712           | 763         | 802         | 853          | 790          | 779          |
| Taiwan               | 159           | 207         | 229         | 186          | 189          | 213          |
| South Korea          | -60           | 147         | 433         | 551          | 477          | 128          |
| Poland               | -82           | -125        | -82         | 17           | -15          | 107          |
| Czech Republic       | 19            | 29          | 38          | 36           | 69           | 84           |
| Austria              | 84            | 88          | 56          | 138          | 124          | 63           |
| Estonia              | 11            | 17          | 15          | 24           | 22           | 24           |
| Hungary              | 51            | 78          | 68          | 6            | 10           | 21           |
| Lithuania            | 2             | 15          | 16          | 17           | 9            | 2            |
| Tunisia              | -3            | 9           | 4           | 3            | -3           | -4           |
| Malaysia             | 2             | 113         | 222         | 190          | 95           | -5           |
| Slovenia             | -2            | -1          | 6           | 3            | 0            | -6           |
| Bulgaria             | -19           | -14         | -5          | -13          | -15          | -7           |
| Bahrain              | -26           | -20         | -29         | -26          | -25          | -22          |
| Philippines          | -7            | -10         | -20         | 6            | -11          | -22          |
| Belarus              | -16           | -12         | -19         | -34          | -30          | -23          |
| Denmark              | -27           | -10         | 10          | -18          | -5           | -24          |
| Slovakia             | 41            | 45          | 42          | 4            | -59          | -29          |
| Portugal             | -62           | -44         | -10         | -7           | -21          | -38          |
| Kazakhstan           | -48           | -65         | -81         | -78          | -76          | -46          |
| Croatia              | -41           | -47         | -42         | -37          | -41          | -47          |
| Greece               | -84           | -52         | 3           | -34          | -42          | -52          |
| Jordan               | -19           | -24         | -25         | -29          | -35          | -54          |
| Indonesia            | -32           | -43         | -32         | -59          | -58          | -55          |
| Lebanon              | -30           | -32         | -39         | -46          | -47          | -57          |
| Venezuela            | -38           | -53         | -80         | -64          | -49          | -59          |
| Romania              | -39           | -41         | -21         | -26          | -37          | -61          |
| Argentina            | -39           | -57         | -40         | -51          | -42          | -61          |
| Oman                 | -43           | -47         | -41         | -57          | -70          | -71          |
| Colombia             | -36           | -40         | -50         | -51          | -63          | -71          |
| Algeria              | -51           | -39         | -38         | -44          | -60          | -75          |
| Germany              | 264           | 293         | 123         | 15           | -137         | -77          |
| Morocco              | -39           | -50         | -55         | -56          | -63          | -77          |
| Egypt                | -32           | -23         | -19         | -30          | -36          | -84          |
| Finland              | -81           | -88         | -106        | -96          | -83          | -93          |
| Ukraine              | -71           | -101        | -116        | -135         | -96          | -95          |
| South Africa         | -31           | -44         | -82         | -82          | -78          | -96          |
| Ireland              | -63           | -51         | -54         | -51          | -76          | -104         |
| Kuwait               | -40           | -44         | -65         | -78          | -75          | -108         |
| New Zealand          | -39           | -39         | -61         | -83          | -94          | -131         |
| Thailand             | 10            | -8          | -39         | -60          | -95          | -136         |
| Chile                | -81           | -94         | -129        | -131         | -132         | -164         |
| Singapore            | -85           | -99         | -116        | -141         | -121         | -171         |
| Israel               | -83           | -99         | -104        | -128         | -147         | -179         |
| Qatar                | -113          | -126        | -137        | -151         | -156         | -181         |
| Brazil               | -90           | -110        | -150        | -180         | -177         | -189         |
| Belgium              | -18           | -76         | -143        | -166         | -176         | -207         |
| Spain                | -155          | -86         | 26          | 79           | -34          | -222         |
| Turkey               | -73           | -118        | -88         | -151         | -194         | -234         |
| Netherlands          | -194          | -241        | -331        | -255         | -219         | -278         |
| Sweden               | -108          | -134        | -149        | -166         | -222         | -308         |
| Norway               | -192          | -230        | -270        | -291         | -317         | -365         |
| Saudi Arabia         | -162          | -209        | -290        | -386         | -450         | -475         |
| India                | 36            | 56          | 14          | -182         | -329         | -514         |
| Russia               | -557          | -667        | -833        | -812         | -649         | -524         |
| Switzerland          | -325          | -377        | -421        | -452         | -460         | -544         |
| Vietnam              | -26           | -32         | -40         | -121         | -309         | -592         |
| France               | -586          | -560        | -608        | -623         | -639         | -748         |
| Australia            | -338          | -400        | -535        | -590         | -654         | -770         |
| Japan                | -346          | -569        | -823        | -776         | -771         | -798         |
| United Arab Emirates | -208          | -227        | -416        | -506         | -739         | -850         |
| Canada               | -653          | -668        | -799        | -821         | -825         | -917         |
| United Kingdom       | -663          | -578        | -678        | -807         | -1,039       | -1,207       |
| United States        | -3,409        | -3,483      | -4,573      | -5,108       | -5,542       | -7,297       |
| <b>Total</b>         | <b>-1,462</b> | <b>-833</b> | <b>-745</b> | <b>2,536</b> | <b>4,205</b> | <b>7,100</b> |

Source: CSIL processing of official data

## 4.2 Europa

Dopo la Germania, l'Italia è il principale esportatore Europeo di apparecchi di illuminazione, ed uno dei maggiori al mondo (fra il terzo ed il quinto posto: primeggia ovviamente la Cina e bisogna poi tenere conto del sistema integrato nord americano).

In termini di quota sul totale Europeo, l'Italia ha registrato un leggero declino (dal 18% al 17%) fra il 2010 ed il 2015.

L'Italia ha mostrato una maggiore capacità di fuoriuscita dai confini Europei: il continente rappresentava circa il 74% delle esportazioni nel 2010 ed il 66% nel 2015.

Le tendenze geografiche non sono dissimili da quelle registrate per l'aggregato Europeo: l'America cresce al tasso medio annuo del 14%, il Medio Oriente del 12%, l'Asia il 10%.

### Europa Centrale ed Occidentale

L'Italia è il terzo Paese di provenienza delle importazioni per Francia, Spagna e Svizzera, nonché il quarto fornitore per Germania, Austria e Gran Bretagna.

In Europa circa il 25%-30% della illuminazione professionale passa dal Contract.

Un altro 20%-25% è appannaggio degli specialisti di illuminazione.

Con significative differenze da Paese a Paese, grossisti di illuminazione controllano all'incirca il 40% del mercato.

Poco meno del 10% viaggia tramite canali despecializzati: negozi di mobili, grandi magazzini, fai-da-te (canali che ovviamente sono molto più ampi per la illuminazione residenziale).

L'incidenza dell'e-commerce è nell'ordine del 2% e tende velocemente a crescere, almeno per determinate tipologie di prodotto.

La quota di mercato nell'alto gamma sfiora il 10% in Germania-Austria-Svizzera e supera il 35% in Spagna-Portogallo. intorno al 15% negli altri Paesi, con punte anche superiori al 20% in Francia.

### Paesi Scandinavi

Minore la capacità di penetrazione italiana nel mercato Scandinavo, fatta eccezione per la Danimarca, dove confermiamo un quarto posto in graduatoria.

In Norvegia le imprese italiane si presentano in quinta posizione, mentre Finlandia e Svezia mostrano una maggiore complementarità con i Paesi limitrofi.

La quota di mercato nell'alto gamma sfiora il 15%.

### Europa dell'Est e Russia

In flessione un po' per tutti, l'Italia conferma la seconda posizione (dopo la Cina) fra i Paesi fornitori di apparecchi di illuminazione per la Russia e l'Ucraina (e la terza posizione in Kazakhstan).

Fra la seconda e la quarta posizione anche nelle vicinissime Slovenia e Croazia, ma anche Repubblica Ceca e Romania.

Minore il grado di penetrazione in Ungheria, Slovacchia, Bulgaria. Non superiore al 10% la quota di mercato nell'alto gamma.

## 4.3 America

Le esportazioni italiane di illuminazione negli Stati Uniti sfiorano i 90 milioni di Euro, non pochi in assoluto ma una goccia sulle dimensioni del mercato. Anche se ci limitiamo a monitorare il cosiddetto alto gamma, la quota di mercato può essere valutata intorno al 3%-4%.

In Canada, Messico e Brasile l'Italia è il quarto Paese di provenienza delle importazioni di apparecchi per illuminazione. Significativa anche la quinta posizione in Cile.

**TABLE 4.4 USA. Commercial lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                 | EUR million  |              |              | % share in value |              |              |
|-----------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                 | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Hospitality     | 1,567        | 1,425        | 1,924        | 36.0             | 27.0         | 26.0         |
| Office          | 958          | 1,583        | 2,368        | 22.0             | 30.0         | 32.0         |
| Retail          | 1,306        | 1,583        | 2,109        | 30.0             | 30.0         | 28.5         |
| Art/Museum      | 44           | 53           | 81           | 1.0              | 1.0          | 1.1          |
| Entertainment   | 305          | 264          | 370          | 7.0              | 5.0          | 5.0          |
| Infrastructures | 174          | 369          | 548          | 4.0              | 7.0          | 7.4          |
| <b>Total</b>    | <b>4,354</b> | <b>5,276</b> | <b>7,400</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing

**TABLE 4.5 USA. Outdoor lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                                    | EUR million  |              |              | % share in value |              |              |
|------------------------------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                                    | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Residential outdoor                | 217          | 256          | 368          | 10.0             | 9.0          | 9.2          |
| Urban landscape                    | 760          | 824          | 1,164        | 35.0             | 29.0         | 29.1         |
| Christmas and event lighting       | 109          | 165          | 240          | 5.0              | 5.8          | 6.0          |
| Streets and major roads            | 626          | 937          | 1,280        | 28.8             | 33.0         | 32.0         |
| Tunnel                             | 26           | 34           | 48           | 1.2              | 1.2          | 1.2          |
| Sport plants and other large areas | 434          | 625          | 900          | 20.0             | 22.0         | 22.5         |
| <b>Total</b>                       | <b>2,172</b> | <b>2,840</b> | <b>4,002</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing



## 4.4 China

In Cina, Giappone, India, le imprese italiane (in base a stime Csil) controllano circa il 3% del mercato alto gamma.

**TABLE 4.6 China. Commercial lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                 | EUR million  |              |              | % share in value |              |              |
|-----------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                 | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Hospitality     | 635          | 719          | 1,022        | 22.0             | 20.0         | 20.8         |
| Office          | 924          | 1,168        | 1,768        | 32.0             | 32.5         | 35.9         |
| Retail          | 982          | 1,114        | 1,518        | 34.0             | 31.0         | 30.8         |
| Art/Museum      | 29           | 90           | 105          | 1.0              | 2.5          | 2.1          |
| Entertainment   | 144          | 251          | 248          | 5.0              | 7.0          | 5.0          |
| Infrastructures | 173          | 251          | 262          | 6.0              | 7.0          | 5.3          |
| <b>Total</b>    | <b>2,888</b> | <b>3,593</b> | <b>4,923</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing

**TABLE 4.7 China. Outdoor lighting. Breakdown of supply by destination, 2011-2013-2015. EUR million and % share in value**

|                                    | EUR million  |              |              | % share in value |              |              |
|------------------------------------|--------------|--------------|--------------|------------------|--------------|--------------|
|                                    | 2011         | 2013         | 2015         | 2011             | 2013         | 2015         |
| Residential outdoor                | 246          | 436          | 530          | 9.0              | 13.0         | 13.5         |
| Urban landscape                    | 574          | 603          | 892          | 21.0             | 18.0         | 22.7         |
| Christmas and event lighting       | 164          | 134          | 161          | 6.0              | 4.0          | 4.1          |
| Streets and major roads            | 1,285        | 1,441        | 1,571        | 47.0             | 43.0         | 40.0         |
| Tunnel                             | 219          | 335          | 310          | 8.0              | 10.0         | 7.9          |
| Sport plants and other large areas | 246          | 402          | 464          | 9.0              | 12.0         | 11.8         |
| <b>Total</b>                       | <b>2,734</b> | <b>3,351</b> | <b>3,928</b> | <b>100.0</b>     | <b>100.0</b> | <b>100.0</b> |

Source: CSIL processing

## 4.5 Russia, Medio Oriente, Turchia, Africa

Nell'alto gamma, le imprese italiane registrano una quota di mercato che sfiora il 15% nel Medio Oriente, e probabilmente lo supera in Russia.

In Qatar l'Italia è il primo paese di provenienza delle importazioni di apparecchi di illuminazione. L'Italia è anche il secondo fornitore sia per Israele che per gli Emirati, e presenta una valida terza posizione anche in Arabia Saudita, Egitto, Turchia, Sud Africa.

## 4.6 Asia ed Oceania

Su dodici Paesi esaminati, l'Italia si presenta nella top 5 (più precisamente in quarta o quinta posizione) in Cina, India (quindi i mercati a maggiore potenziale), Singapore (un mercato "ricco"), Australia e Nuova Zelanda.

Minore il grado di penetrazione in Giappone e Sud Korea, così come in Malesia, Tailandia, Vietnam, Indonesia e Filippine.

Nell'alto gamma, la quota di mercato delle imprese italiane si aggira nell'ordine del 3% (con punte superiori in Australia).

## 5. Il mercato italiano della illuminazione

Il mercato Italiano degli apparecchi di illuminazione nella sua componente professionale viene valutato pari a circa 883 milioni di Euro per l'anno 2015, con una crescita pari al 5,6% rispetto all'anno precedente.

Il mercato Italiano della illuminazione professionale assorbe circa 500 milioni di Euro di prodotti di importazione, parte importazioni effettive di prodotti destinati al mercato finale, e parte componentistica ed outsourcing delle imprese Italiane all'estero.

Le esportazioni di apparecchi di illuminazione professionali vengono stimate sempre da Csil pari a 1080 milioni di Euro, con una significativa crescita del 9,2 sempre con raffronto al 2014.

La Cina è il principale Paese di provenienza delle importazioni Italiane, ma significativa è anche la presenza di Germania, Austria, Francia, Spagna.

Da osservare come in tutti questi Paesi una o più medie e grandi imprese Italiane presentano stabilimenti di produzione.

Le imprese italiane di illuminazione registrano un più elevato fatturato per addetto rispetto alla media Europea: rispettivamente 210 e 200 mila Euro.

Il settore della illuminazione ha registrato nel complesso una buona performance negli anni passati anche in termini di redditività: sfiora il 9% l'EBITDA medio 2015 delle maggiori imprese Europee, e supera il 10% nel caso di molte fra le imprese italiane leader nel settore.

**TABLE 5.1 Italy. Exports of lighting fixtures by country and by geographical area of destination, 2010-2015**

|                         | EUR million    |                |                |                |                |                | % share      |              | % change    |              |
|-------------------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|--------------|-------------|--------------|
|                         | 2010           | 2011           | 2012           | 2013           | 2014           | 2015           | 2010         | 2015         | 15/14       | Av.<br>10-15 |
| Germany                 | 130.0          | 159.3          | 169.0          | 166.2          | 180.8          | 182.7          | 10.0         | 11.2         | 1.1         | 7.0          |
| France                  | 190.2          | 199.9          | 191.4          | 188.9          | 173.2          | 181.4          | 14.6         | 11.1         | 4.7         | -1.0         |
| United Kingdom          | 64.6           | 71.4           | 76.3           | 74.2           | 85.8           | 98.2           | 5.0          | 6.0          | 14.5        | 8.7          |
| United States           | 40.5           | 48.4           | 56.4           | 60.9           | 67.0           | 87.4           | 3.1          | 5.3          | 30.4        | 16.6         |
| Russia                  | 83.8           | 95.0           | 102.5          | 128.2          | 104.6          | 72.0           | 6.4          | 4.4          | -31.1       | -3.0         |
| Switzerland             | 49.6           | 58.5           | 55.6           | 63.2           | 65.4           | 70.5           | 3.8          | 4.3          | 7.8         | 7.3          |
| Spain                   | 76.5           | 72.9           | 56.4           | 51.9           | 59.3           | 70.5           | 5.9          | 4.3          | 18.9        | -1.6         |
| United Arab Emirates    | 36.1           | 38.8           | 48.8           | 45.6           | 46.5           | 60.6           | 2.8          | 3.7          | 30.3        | 10.9         |
| Belgium                 | 36.6           | 41.5           | 41.6           | 39.2           | 42.7           | 45.6           | 2.8          | 2.8          | 6.9         | 4.5          |
| Saudi Arabia            | 22.3           | 29.8           | 29.6           | 29.7           | 37.0           | 43.5           | 1.7          | 2.7          | 17.6        | 14.3         |
| Netherlands             | 32.5           | 32.1           | 32.6           | 33.2           | 36.3           | 41.0           | 2.5          | 2.5          | 12.9        | 4.7          |
| Austria                 | 39.6           | 41.2           | 45.7           | 50.9           | 48.5           | 36.8           | 3.0          | 2.3          | -24.2       | -1.5         |
| Qatar                   | 18.8           | 16.5           | 19.8           | 27.4           | 33.8           | 36.0           | 1.4          | 2.2          | 6.5         | 13.9         |
| Sweden                  | 13.3           | 17.5           | 18.3           | 21.3           | 23.7           | 29.0           | 1.0          | 1.8          | 22.1        | 16.9         |
| Poland                  | 24.5           | 24.8           | 23.7           | 22.9           | 26.0           | 28.0           | 1.9          | 1.7          | 7.5         | 2.7          |
| Norway                  | 13.1           | 14.2           | 18.2           | 21.0           | 22.0           | 23.1           | 1.0          | 1.4          | 4.9         | 11.9         |
| China                   | 12.9           | 13.6           | 16.0           | 23.0           | 20.7           | 22.6           | 1.0          | 1.4          | 9.4         | 11.8         |
| Israel                  | 9.6            | 11.6           | 11.5           | 13.2           | 15.2           | 19.6           | 0.7          | 1.2          | 29.4        | 15.3         |
| Australia               | 14.1           | 17.5           | 17.8           | 16.9           | 17.8           | 18.6           | 1.1          | 1.1          | 4.4         | 5.6          |
| Denmark                 | 16.6           | 17.4           | 15.2           | 15.9           | 16.3           | 18.1           | 1.3          | 1.1          | 10.9        | 1.8          |
| <b>Top 20</b>           | <b>925.3</b>   | <b>1,021.7</b> | <b>1,046.4</b> | <b>1,093.6</b> | <b>1,122.5</b> | <b>1,185.0</b> | <b>71.1</b>  | <b>72.6</b>  | <b>5.6</b>  | <b>5.1</b>   |
| Others                  | 375.2          | 381.2          | 377.5          | 388.3          | 410.3          | 448.0          | 28.9         | 27.4         | 9.2         | 3.6          |
| <b>Americas</b>         | <b>70.5</b>    | <b>82.6</b>    | <b>95.9</b>    | <b>102.7</b>   | <b>108.1</b>   | <b>134.6</b>   | <b>5.4</b>   | <b>8.2</b>   | <b>24.5</b> | <b>13.8</b>  |
| - North America         | 48.6           | 57.2           | 66.1           | 70.2           | 77.4           | 98.8           | 3.7          | 6.1          | 27.7        | 15.3         |
| - Central-South America | 21.9           | 25.4           | 29.9           | 32.5           | 30.7           | 35.8           | 1.7          | 2.2          | 16.4        | 10.3         |
| <b>Asia and Pacific</b> | <b>103.1</b>   | <b>120.0</b>   | <b>126.2</b>   | <b>130.4</b>   | <b>134.2</b>   | <b>163.3</b>   | <b>7.9</b>   | <b>10.0</b>  | <b>21.6</b> | <b>9.6</b>   |
| <b>Europe</b>           | <b>959.9</b>   | <b>1,035.5</b> | <b>1,021.0</b> | <b>1,060.7</b> | <b>1,066.1</b> | <b>1,084.4</b> | <b>73.8</b>  | <b>66.4</b>  | <b>1.7</b>  | <b>2.5</b>   |
| - European Union (15)   | 656.4          | 701.0          | 688.0          | 683.9          | 715.5          | 759.9          | 50.5         | 46.5         | 6.2         | 3.0          |
| - New EU Members (13)   | 107.9          | 110.0          | 107.2          | 104.9          | 111.9          | 121.3          | 8.3          | 7.4          | 8.4         | 2.4          |
| - Enlarged EU (28)      | 764.3          | 811.0          | 795.2          | 788.8          | 827.4          | 881.2          | 58.8         | 54.0         | 6.5         | 2.9          |
| - Norway & Switzerland  | 62.7           | 72.6           | 73.8           | 84.1           | 87.4           | 93.6           | 4.8          | 5.7          | 7.1         | 8.3          |
| - Other Europe          | 132.8          | 151.8          | 152.0          | 187.8          | 151.3          | 109.6          | 10.2         | 6.7          | -27.5       | -3.8         |
| <b>Middle East</b>      | <b>115.8</b>   | <b>128.8</b>   | <b>143.8</b>   | <b>146.0</b>   | <b>172.4</b>   | <b>202.2</b>   | <b>8.9</b>   | <b>12.4</b>  | <b>17.3</b> | <b>11.8</b>  |
| <b>Africa</b>           | <b>50.9</b>    | <b>35.9</b>    | <b>37.0</b>    | <b>42.1</b>    | <b>51.8</b>    | <b>48.5</b>    | <b>3.9</b>   | <b>3.0</b>   | <b>-6.3</b> | <b>-0.9</b>  |
| <b>Other Countries</b>  | <b>0.5</b>     | <b>0.0</b>     | <b>0.0</b>     | <b>0.0</b>     | <b>0.1</b>     | <b>0.0</b>     | <b>0.0</b>   | <b>0.0</b>   | <b>n.s.</b> | <b>-45.3</b> |
| <b>Total</b>            | <b>1,300.6</b> | <b>1,402.9</b> | <b>1,423.9</b> | <b>1,482.0</b> | <b>1,532.7</b> | <b>1,633.0</b> | <b>100.0</b> | <b>100.0</b> | <b>6.5</b>  | <b>4.7</b>   |

Source: CSIL processing of official data

**TABLE 5.2 Italy. Imports of lighting fixtures by country and by geographical area of destination, 2010-2015**

|                         | EUR million  |              |              |              |              |              | % share      |              | % change    |              |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|--------------|
|                         | 2010         | 2011         | 2012         | 2013         | 2014         | 2015         | 2010         | 2015         | 15/14       | Av.<br>10-15 |
| China                   | 265.2        | 272.5        | 274.1        | 287.0        | 342.7        | 413.9        | 45.0         | 48.4         | 20.8        | 9.3          |
| Germany                 | 92.0         | 100.2        | 95.8         | 86.7         | 101.3        | 102.5        | 15.6         | 12.0         | 1.2         | 2.2          |
| France                  | 38.4         | 45.3         | 40.4         | 36.5         | 42.0         | 56.7         | 6.5          | 6.6          | 35.0        | 8.1          |
| Austria                 | 43.7         | 45.9         | 41.0         | 44.3         | 43.2         | 47.5         | 7.4          | 5.6          | 9.8         | 1.7          |
| Spain                   | 17.8         | 27.8         | 27.5         | 26.5         | 34.7         | 44.8         | 3.0          | 5.2          | 29.0        | 20.3         |
| Hungary                 | 22.1         | 24.7         | 21.9         | 21.8         | 25.6         | 27.3         | 3.8          | 3.2          | 6.9         | 4.3          |
| Netherlands             | 8.7          | 11.7         | 13.8         | 19.1         | 24.3         | 23.3         | 1.5          | 2.7          | -3.9        | 21.8         |
| Poland                  | 5.2          | 7.0          | 14.4         | 14.1         | 14.4         | 18.1         | 0.9          | 2.1          | 25.5        | 28.2         |
| United States           | 12.2         | 10.6         | 9.6          | 8.4          | 15.0         | 17.1         | 2.1          | 2.0          | 14.4        | 7.1          |
| Czech Republic          | 7.8          | 10.3         | 10.2         | 11.8         | 15.0         | 14.1         | 1.3          | 1.7          | -5.6        | 12.6         |
| United Kingdom          | 6.9          | 8.4          | 8.0          | 8.6          | 8.3          | 11.5         | 1.2          | 1.4          | 38.5        | 10.8         |
| Bulgaria                | 0.9          | 1.9          | 2.7          | 3.3          | 4.8          | 7.4          | 0.1          | 0.9          | 53.7        | 53.4         |
| Switzerland             | 5.2          | 5.0          | 3.6          | 3.6          | 3.6          | 6.6          | 0.9          | 0.8          | 82.7        | 4.8          |
| Belgium                 | 15.1         | 16.2         | 11.3         | 7.6          | 4.9          | 5.5          | 2.6          | 0.6          | 11.5        | -18.2        |
| South Korea             | 1.0          | 2.0          | 1.0          | 4.2          | 6.5          | 4.8          | 0.2          | 0.6          | -25.6       | 37.1         |
| Taiwan                  | 3.5          | 4.1          | 3.6          | 3.1          | 3.4          | 4.6          | 0.6          | 0.5          | 34.4        | 5.7          |
| Slovakia                | 4.0          | 3.9          | 3.8          | 3.2          | 3.5          | 4.5          | 0.7          | 0.5          | 28.3        | 2.5          |
| Romania                 | 4.2          | 4.2          | 3.5          | 4.8          | 5.7          | 4.3          | 0.7          | 0.5          | -24.8       | 0.5          |
| Tunisia                 | 0.3          | 1.9          | 0.6          | 2.6          | 3.6          | 4.0          | 0.0          | 0.5          | 11.8        | 72.1         |
| India                   | 3.7          | 3.7          | 3.8          | 3.3          | 3.5          | 3.8          | 0.6          | 0.4          | 8.8         | 0.3          |
| <b>Top 20</b>           | <b>557.7</b> | <b>607.2</b> | <b>590.6</b> | <b>600.7</b> | <b>706.0</b> | <b>822.3</b> | <b>94.7</b>  | <b>96.2</b>  | <b>16.5</b> | <b>8.1</b>   |
| Others                  | 31.1         | 32.7         | 31.3         | 28.6         | 36.4         | 32.1         | 5.3          | 3.8          | -11.9       | 0.6          |
| <b>Americas</b>         | <b>13.5</b>  | <b>12.6</b>  | <b>11.0</b>  | <b>10.0</b>  | <b>16.5</b>  | <b>19.0</b>  | <b>2.3</b>   | <b>2.2</b>   | <b>15.1</b> | <b>7.1</b>   |
| - North America         | 12.4         | 11.0         | 10.0         | 9.0          | 15.8         | 17.9         | 2.1          | 2.1          | 13.1        | 7.6          |
| - Central-South America | 1.1          | 1.7          | 1.0          | 1.1          | 0.7          | 1.1          | 0.2          | 0.1          | 62.2        | 0.3          |
| <b>Asia and Pacific</b> | <b>279.9</b> | <b>290.8</b> | <b>290.5</b> | <b>305.6</b> | <b>365.4</b> | <b>436.0</b> | <b>47.5</b>  | <b>51.0</b>  | <b>19.3</b> | <b>9.3</b>   |
| <b>Europe</b>           | <b>290.1</b> | <b>329.5</b> | <b>314.3</b> | <b>307.7</b> | <b>353.7</b> | <b>392.6</b> | <b>49.3</b>  | <b>45.9</b>  | <b>11.0</b> | <b>6.2</b>   |
| - European Union (15)   | 229.9        | 263.7        | 247.1        | 238.8        | 271.4        | 301.0        | 39.0         | 35.2         | 10.9        | 5.5          |
| - New EU Members (13)   | 51.1         | 58.5         | 61.4         | 63.4         | 76.1         | 82.0         | 8.7          | 9.6          | 7.7         | 9.9          |
| - Enlarged EU (28)      | 281.0        | 322.2        | 308.5        | 302.2        | 347.6        | 382.9        | 47.7         | 44.8         | 10.2        | 6.4          |
| - Norway & Switzerland  | 5.5          | 5.2          | 3.9          | 4.0          | 3.9          | 6.7          | 0.9          | 0.8          | 73.6        | 4.0          |
| - Other Europe          | 3.6          | 2.1          | 1.9          | 1.5          | 2.2          | 2.9          | 0.6          | 0.3          | 29.4        | -4.2         |
| <b>Middle East</b>      | <b>0.5</b>   | <b>0.8</b>   | <b>0.9</b>   | <b>0.8</b>   | <b>0.6</b>   | <b>0.9</b>   | <b>0.1</b>   | <b>0.1</b>   | <b>47.2</b> | <b>14.3</b>  |
| <b>Africa</b>           | <b>4.9</b>   | <b>6.2</b>   | <b>5.1</b>   | <b>5.2</b>   | <b>6.2</b>   | <b>5.9</b>   | <b>0.8</b>   | <b>0.7</b>   | <b>-4.6</b> | <b>3.8</b>   |
| <b>Other Countries</b>  | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>0.0</b>   | <b>n.c.</b> | <b>n.s.</b>  |
| <b>Total</b>            | <b>588.9</b> | <b>639.9</b> | <b>621.9</b> | <b>629.4</b> | <b>742.4</b> | <b>854.4</b> | <b>100.0</b> | <b>100.0</b> | <b>15.1</b> | <b>7.7</b>   |

Source: CSIL processing of official data

## 6. Alcune indicazioni per il prossimo futuro

Una primissima, seppure scontata, osservazione, deriva dall'andamento del PIL mondiale.

Come risulta evidente dal grafico successivo, esiste una correlazione forte fra andamento del PIL di una economia e domanda di Luce.

Non si tratta evidentemente di una correlazione univoca: la forte domanda relativa di Luce in Norvegia e Finlandia ha certamente a che fare con le ore di luce disponibili, e negli Emirati sono disponibili certamente ragioni di prestigio.

Va poi detto che negli ultimi anni (e presumibilmente nei prossimi) la elasticità al reddito della domanda di luce è stata positiva, vale a dire che per ogni unità di reddito aggiuntivo la domanda di luce è cresciuta più che proporzionalmente. Domanda e redditività delle imprese sono state sostenute da un elevato tasso di innovazione, ed il "portafoglio idee" per il futuro (humancentric lighting, IoT...) lascia ben sperare.

Come anticipato, in questi anni le imprese Italiane hanno retto complessivamente bene lo stato di crisi (fondamentalmente in Italia ed Europa) ma hanno probabilmente anche perso opportunità. Di tutto rispetto le quote di mercato in Europa, un po' meno altrove. Una indicazione può probabilmente venire dalle dimensioni medie di impresa: nei maggiori segmenti di mercato e nelle macro Regioni: i top 3 players in genere controllano fra il 10% ed il 20% del mercato, 15-20 imprese hanno dimensioni ragguardevoli, controllando oltre l'1% del mercato di riferimento.

FIGURE 6.1 Per capita apparent consumption of lighting fixtures and per capita GNP by country, 2015



Source: CSIL processing  
(\*) Change of scale

FIGURE 6.2 Competitive system: degree of concentration of the world LED market

| Segment            | Market share of the top 3 players | Number of players with market share > 1% | Market share of players with market share < 1% |
|--------------------|-----------------------------------|--|--|
|                    | %                                 |  | %  |
| <b>Residential</b> | <b>25</b>                         | <b>36</b>                                | <b>11</b>                                      |
| <b>Hospitality</b> | <b>10</b>                         | <b>13</b>                                | <b>77</b>                                      |
| <b>Office</b>      | <b>17</b>                         | <b>13</b>                                | <b>67</b>                                      |
| <b>Retail</b>      | <b>10</b>                         | <b>12</b>                                | <b>76</b>                                      |
| <b>Industrial</b>  | <b>16</b>                         | <b>18</b>                                | <b>50</b>                                      |
| <b>Outdoor</b>     | <b>12</b>                         | <b>11</b>                                | <b>75</b>                                      |

**BY SEGMENT**

| Segment              | Market share of the top 3 players | Number of players with market share > 1% | Market share of players with market share < 1% |
|----------------------|-----------------------------------|--|--|
|                      | %                                 |  | %  |
| <b>West Europe</b>   | <b>19</b>                         | <b>18</b>                                | <b>56</b>                                      |
| <b>North America</b> | <b>27</b>                         | <b>13</b>                                | <b>52</b>                                      |
| <b>China</b>         | <b>14</b>                         | <b>15</b>                                | <b>69</b>                                      |

**BY GEOGRAPHIC AREA**

Source: CSIL processing data

Altri possibili driver di crescita e cambiamento:

- IoT può portare nel mercato nuovi players (Apple?) e canali distributivi (elettronica....come in Giappone)
- HumanCentric Lighting forse è (anche) uno slogan, ma è uno slogan di successo
- E-commerce.....nel Consumer in Italia raggiungerà presto il 6% del mercato. Il tasso di crescita in Europa è a due cifre
- Vi è chi dice "no space for OLED in general lighting" ma un impegno forte da parte di qualche player importante (Ikea?) potrebbe spostare gli equilibri
- Retrofit...una volta finita la prima installazione, il mercato non potrà che declinare.

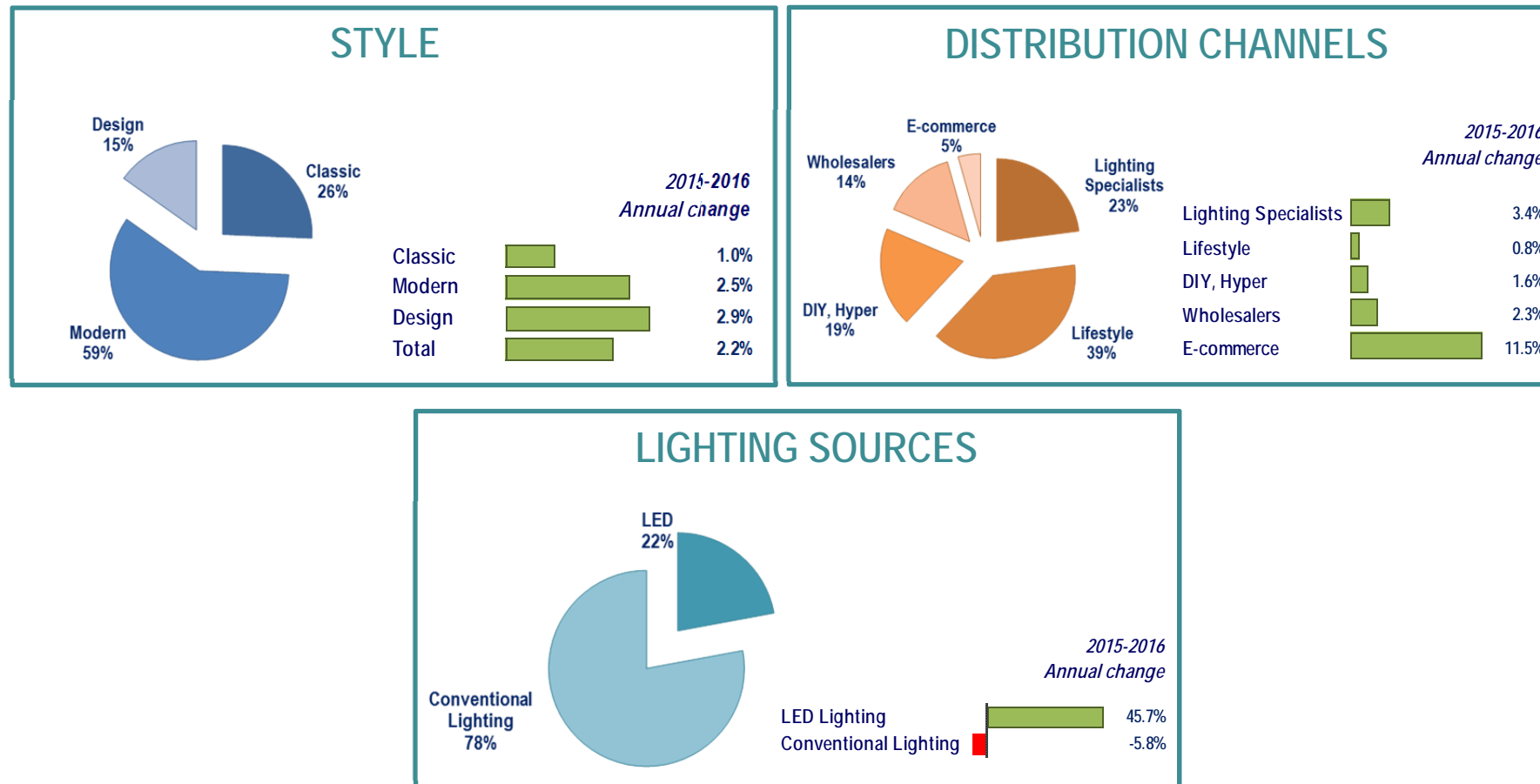
Tra le tecnologie in ballo, i protocolli internet (IP) ed il Power over Ethernet (PoE). Ma anche la tecnologia Li-Fi nel momento in cui un apparecchio di illuminazione IP-based diviene punto di accesso alla rete Li-Fi (da integrare nei device, e pare che sarà possibile con le prossime generazioni di iPhones).

IP-based lighting può dare accesso ad altre "cose" ad internet con un network senza fili.

PoE dovrebbe essere ideale per installazioni IT-based, come incassi e pannelli LED da ufficio, mentre la tecnologia alternative (IP-based) dovrebbe applicarsi alla maggior parte delle realizzazioni Outdoor.

Alla base, la valutazione di Cisco secondo cui si passerebbe da 200 milioni di device connessi nel 2000 (PC's Internet), ai 10 miliardi nel 2010 (mobile), a 50 miliardi in un prossimo futuro 2020 (IoT).

FIGURE 6.3 Focus on Europe: the consumer lighting fixtures market in 2016\*



Source: CSIL processing data  
(\* data refers to 16 West European countries in the first semester of 2016)



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