

LED LIGHTING FOR AIRPORTS AND PORTS

4th Quarter 2019

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Overview

The global airport lighting market accounted for US\$ 540.6 Mn in 2018 and is expected to grow at a CAGR of 7.7% during the forecast period of 2019 - 2027, to account US\$ 1,039.2 Mn by 2027.

The global airport lighting market is experiencing steady growth during the forecast period. Owing to the adoption of solar powered LED lighting solutions and renovation of existing airports. In order to cut short the operational costs, the airport authorities are increasingly inclining towards cost-efficient lighting solution.

Solar powered LED lights offer significantly lesser costs as compared to its counterpart. However, under-investments towards new construction as well as renovation of existing airports in North American countries are directly hindering on the growth of airport lighting market in the current scenario.

A key trends which will predominantly affect the airport lighting market in the coming years are the growing trend of integrating advanced technologies in airfield ground lighting solutions. The airport lighting solutions have come a long way with continuous advancements in the industry. Also, the adoption of technologically robust airfield lighting systems has been remarkable over the years.

The airport lighting system manufacturers are investing significant time and amounts in R&D of new product. There is an increasing emphasize on R&D of advanced lighting solutions to cater to the demand for brighter and cleaner lights. This factor is attracting several airport authorities to adopt the advanced airport lighting solutions in recent times, which pose a significant opportunity for the industry players operating in the airport lighting market.

Airport lighting market by application is segmented into existing airports and new airports. Existing airports holds the highest market share. Growing investments by the government and airport authorities of different countries around the world for airports modernization is anticipated to boost the market growth. For instance, the Russian government is continually working towards the enhancement of runways and taxiways with the utilization of advanced lights. This factor has positively impacted the airport lighting manufacturer's businesses.

Products & Markets

Market by Sector

By Application, market is divided into Military Airport and Civilian and Commercial Airport. By Position, the market is classified into Elevated Airfield Lights, Precision Approach Path Indicator (PAPI) and In-Pavement/Inset Airfield Lights.

Market by Type

As per lighting type, the market is classified into airport beacon, visual glidescope indicator, visual approach scope indicator (VASI), precision approach path indicator (PAPI), runway lighting, runway edge lighting, taxiway lighting, obstruction lighting and others. Runway lighting, runway edge lighting and approach lighting are commonly used types of airport lighting, as their inevitability in commercial aircraft operations during nights.

Market by Divisions

According to application divisions, the market is segmented into airside lighting, landside lighting and terminal lighting. Airside lighting is commonly used due it is mandatory component required in airport lighting. Terminal lighting market is also growing as it is important for ambience of the airport and enhances the appearance of airports.

Supply Chain

The supply chain of this market comprises raw material suppliers, component manufacturers, light manufacturers, original component manufacturers, and airport owners. Key lighting manufacturers for commercial and military airports are Abacus Lighting, ADB Airfield Solutions, ATG Airports, Carmanah Technologies Corp., Honeywell International, Inc., and Vosla GmbH.

New product development and mergers and acquisitions are the key strategies adopted by the key players to gain competitive edge in the market.

MARKET OVERVIEW REPORT

Major Players

Manufacturers

The major global manufacturers are as follows:

- ADB Safegate
- Airfield Lighting
- Astronics Corporation
- Avlite Systems
- Carmanah Technologies
- Eaton (Cooper Industry)
- General Electric
- Honeywell International Inc.
- OCEM Airfield Technology
- OSRAM GmbH

Distributors

Refer attached spreadsheets

Industry Associations

| Organization | Address | Website |
|---|---|--|
| American Lighting Association (ALA) | 2050 North Stemmons Freeway, Unit 100, Dallas, TX 75207 | www.alalighting.com |
| Illuminating Engineering Society of North America (IESNA) | 120 Wall St. Fl 17 New York, NY 10005-4026 | www.ies.org |
| Industry Data Exchange Association (IDEA) | 2900 Crystal Drive-Suite 500 Arlington, VA 22202 | www.idea4industry.com |
| Institute of Electrical and Electronics Engineers (IEEE) | 3 Park Avenue, 17th Floor New York, NY 10016-5997 | www.ieee.org |
| National Association of Electrical Distributors (NAED) | 1181 Corporate Lake Dr St. Louis, MO 63132 | www.naed.org |
| National Electrical Contractors Association (NECA) | 3 Bethesda Metro Center, Suite 1100 Bethesda, MD 20814 | www.necanet.org |
| National Electrical Manufacturers Association (NEMA) | 1300 North 17th Street, Suite 900, Arlington, Virginia 22209 | www.nema.org |
| The Digital Illumination Interface Alliance (DiiA®) | c/o IEEE-ISTO 445 Hoes Lane Piscataway, NJ 08854 | www.digitalilluminationinterface.org |
| LCA - The Lighting Controls Association | c/o NEMA 1300 North 17th Street, Suite 1752 | www.lightingcontrolsassociation.org |

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| | Rosslyn, VA 22209 | |
| NLB - The National Lighting Bureau | 1726-C General George Patton Dr, Brentwood, TN 37067 | www.nlb.org |
| SPIE - The International Society for Optical Engineering | 1000 20th St. Bellingham WA 98225-6705 | www.spie.org |

MARKET OVERVIEW REPORT

USA-Based Industry Conferences & Trade Shows

| Conference | Date | Venue | Website |
|---|--|---|---|
| The International Airport Ground Support Electronics Expo | 20 - 22 Oct 2020 | Rio All-Suites Hotel and Casino, Las Vegas, USA | www.gseexpo.com |
| | Summary: The International GSE Expo is a world-class platform showcasing the latest products, services, equipment and technologies for the global ground support industry. | | |
| Aviation Festival Americas | 12 - 13 May 2020 | JW Marriott Marquis Miami, Miami, USA | www.terrapinn.com/conference/aviation-festival-americas/index.stm |
| | Summary: "Business models. Technology. Innovation. For the global aviation industry." Aviation Festival Americas will feature a wide range of products and services such as Aircraft Revenue Management Systems, Check-in Systems, Kiosks, Loyalty, CRM, Branding, Mobile Platforms, IT integrators, Payment technology, Logistics, Inflight Entertainments & Communications, Travel Distribution etc. | | |
| LIGHTOVATION: Dallas International Lighting Show | 24 - 27 Jun 2020 | Dallas Market Center, Dallas, USA | www.dallasmarketcenter.com/markets/lightovation |
| | Summary: The event features various mind-blowing varieties of lighting systems based on the latest trends and technologies. Buyers from across the world, gather around in Dallas just to experience this great event. The event includes the most innovative product lines and comprehensive collection of several different types of lighting systems. | | |
| Airport Planning, Design and Construction Symposium | 19 - 21 Feb 2020 | Reno, USA | www.aaae.org/aaae/PDCS/Default.aspx |
| | Summary: Airport Planning, Design and Construction Symposium offers highly technical content for airport professionals of all disciplines and experience levels. Workshops include a balanced mix of presentations and interactive discussions between subject matter experts and participants on a broad range of topics. Technical tracks cover planning, terminal, landside, engineering, airside, and program management/construction management, as well as two minitracks featuring interactive workshops on the airport terminal of the future, and workshops on enhancing diversity at the workplace and in airport projects. | | |
| Lightfair International | 05 - 07 May 2020 | Las Vegas Convention Center, Las Vegas, USA | www.lightfair.com/future-dates |
| | Summary: Lightfair International will be one of the most famous events related to lighting industry. The main aim of the event will be to bring top international and domestic architectural, design, engineering and lighting professionals together with exhibitors from around the world. In the event, exhibitors will get an opportunity to showcase their innovative products and service like daylighting products, luminaire types, lampholders and switches, meters, high-end fixtures, mounting devices light sources, exterior luminaires, lighting control components, contemporary and many more. Light | | |

MARKET OVERVIEW REPORT

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| | fair International will conduct with conference; award distribution, special events which will catch the attention of the participant. More than 500 exhibitors will become the part of the event. | | |
| LED Specifier Summit | 18 Nov 2020 | Navy Pier, Chicago, USA | www.ledspecifiersummit.com/midwest/about |
| | Summary: The LED Specifier Summit focuses on the latest LED lighting education and solutions and features commercial, architectural and decorative LED lighting products and controls. | | |