



Lighting Industry in China GLA Conference

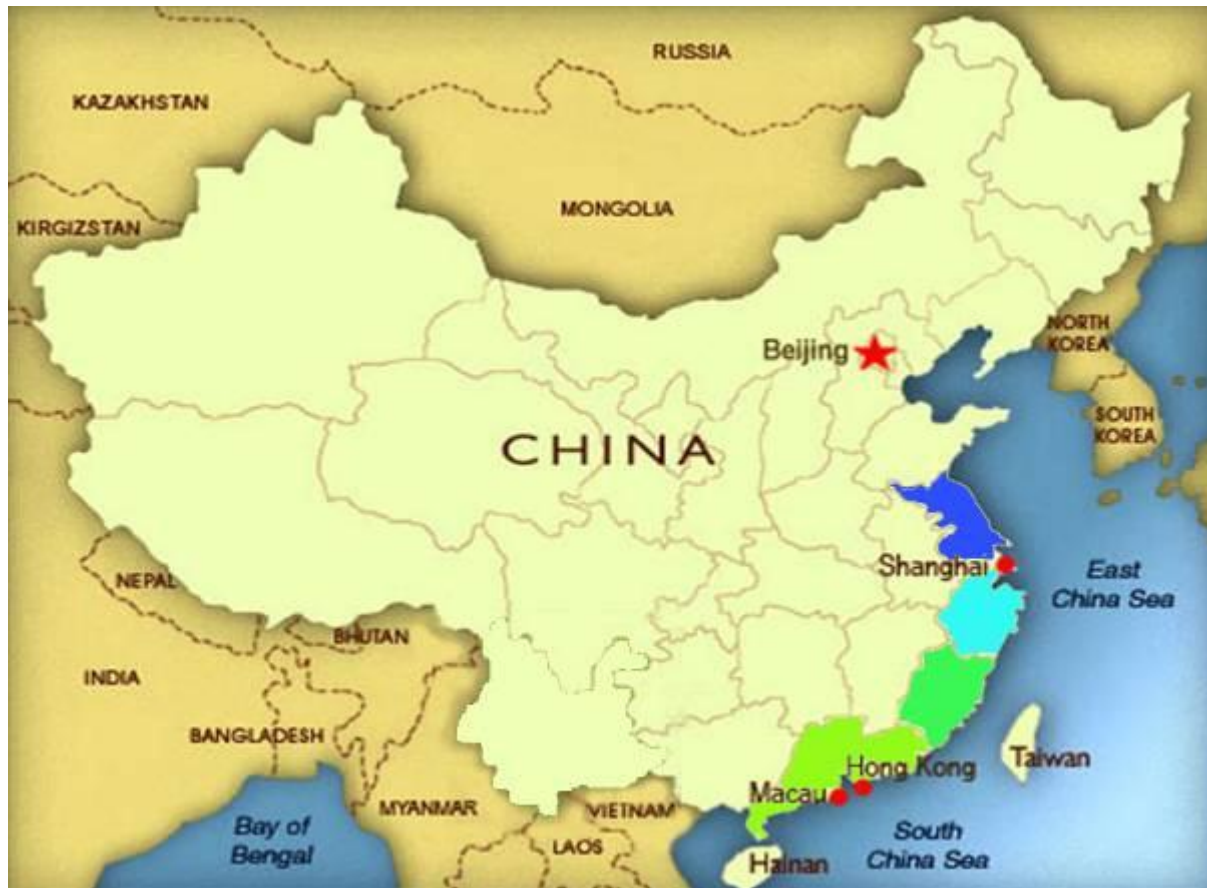
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**China Association of Lighting Industry
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1. Industrial Overviews

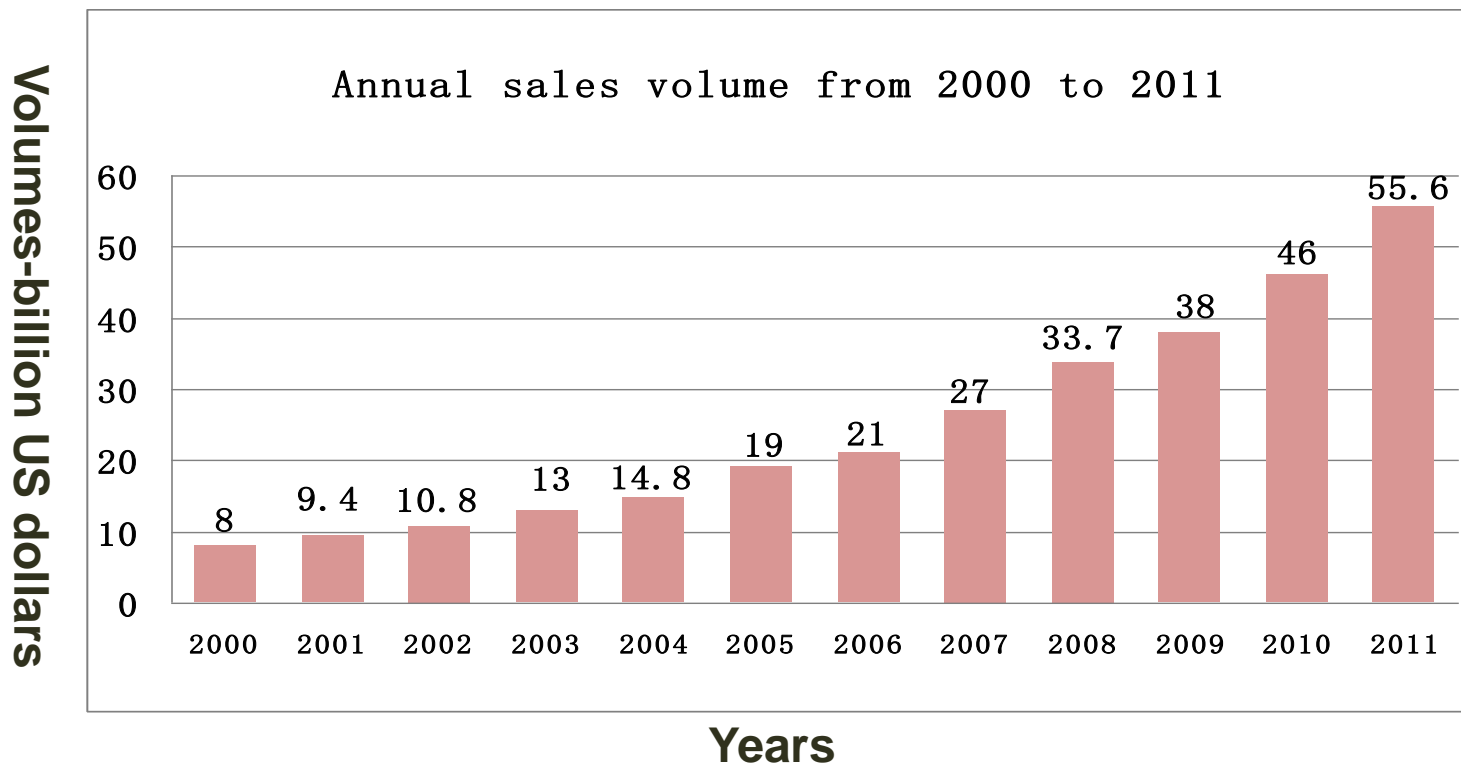
- There are over 10,000 lighting manufacturers in China. It provides various types of lighting products and its quality has enhanced rapidly.
- These manufactures are mainly distributed in China's southeastern coastal areas, including **Guangdong, Fujian, Jiangsu, Zhejiang** and **Shanghai**.





1. Industrial Overviews

- China lighting industry has maintained a rapid, sustainable and steady development trend for more than ten years.
- The **sales volume** of lighting products was **USD 55.6 billion** in 2011.





1. Industrial Overviews

- The output of general incandescent lamps in China in 2011 reached at 4.17 billion.

- The national output of fluorescent lamps reached at 6.9 billion. including
 - 4.62 billion CFLs,
 - 2.1 billion straight tubular fluorescent lamps,
 - 180 million Circle fluorescent lamps.

- The output of HID lamps in China in 2011 was 180 million, including 52.63 million high pressure mercury lamps, 60.95 million high pressure sodium lamps and 66.76 million metal halide lamps.



1. Industrial Overviews

- The structure of electric light source products has witnessed enormous changes over the past decades.
- High efficiency lamp has increased greatly.
- LED, as the lighting source, gets into the general lighting area.

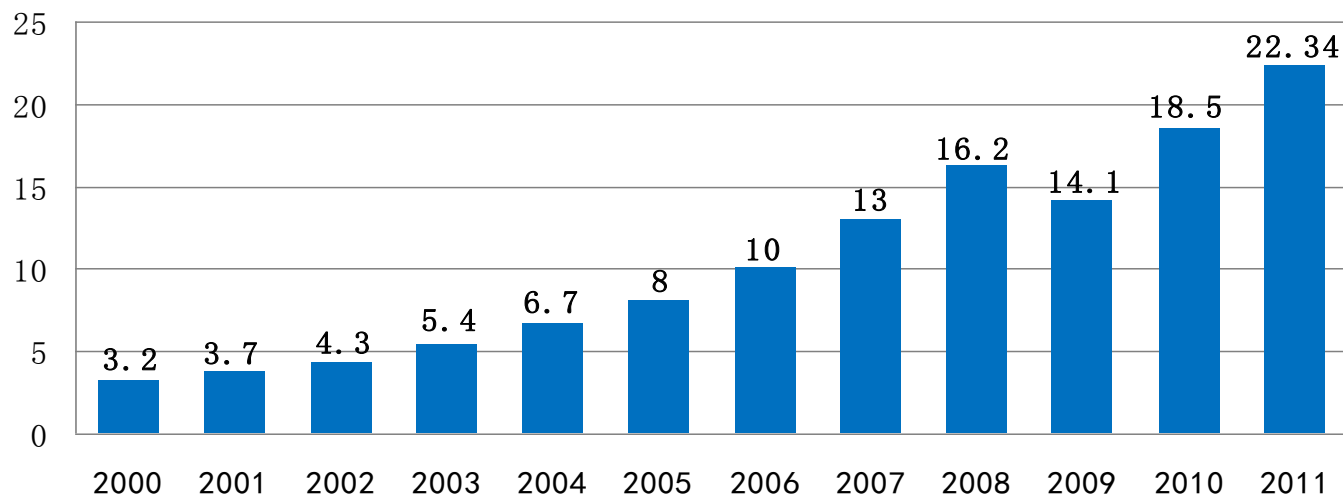


1. Industrial Overviews

- In 2011, the **export volume** of lighting products was **USD 22.34 billion**, which set a historical records .
- And the import volume reached to USD 2.94 billion.

Volumes-billion US dollars

Products export from 2000 to 2011



Years



1. Industrial Overviews

- Nowadays, china could produce all kinds of lighting products, and its quality enhanced greatly.
- China has already become the biggest production and exporting country.





1. Industrial Overviews

Export and import for LED Lighting products

- Now, there is no customs export and import code for LED lighting products, so it is hard to have accurate official statistic, all the statistic provided above is estimated value.
- GLA (**Global Lighting Association**) is coordinated this matters globally.
- WCO (**World Customs Organization**) is responsible for harmonizing commodity description and coding.
- The full name of the system is called **Harmonized Commodity Description and Coding System**, abbreviation **HS** (**Harmonized System**)





1. Industrial Overviews

- China is the largest lighting production country in the world, the lighting products made in China have been exported to over 200 countries.
- World famous lighting companies such as PHILIPS, OSRAM , GE etc. have stationed in the Chinese market since the 90s last century.
- Many of them now regarded China as their main production base, in the form of OEM or ODM.



1. Industrial Overviews

- CFL and Christmas lights have occupied 80% of the global market.
- The production volume of incandescent lamps occupied 1/3 of global incandescent lamps production.
- Export of luminaires have occupied 30% of the global luminaires trade market.
- With the recently LED lighting development, China has been the main base for LED lighting products.
- Many oversea brand companies have made their LED lighting products in China.



2. Phase out inefficient Lighting

- **November 1, 2011, 5 Departments of China have the joint announcement for China Roadmap of Phase-out Incandescent Lamps.**

Stage	Time		Phase-out Incandescent Lamps Plan
	Starting Time	Ending Time	
Stage 1	Nov,1,2011	Sep,30,2012	Transition Period
Stage 2	Oct.1.2012	Sep,30,2014	Banned for Import and Sales of 100W and above
Stage 3	Oct.1.2014	Sep,30,2015	Banned for Import and Sales of 60W and above
Stage 4	Oct.1.2015	Sep,30,2016	Mid-term Evaluating Period Policy Adjustment
Stage 5	Oct.1.2016		Banned for Import and Sales of 15W and above Or Policy Adjustment according to Mid-term Evaluating



2. Phasing out inefficient Lighting

- This year, the subsidies for high efficiency fluorescent lamps are still carried out by Chinese government.
- Meanwhile, in order to promote the application for high efficient lighting, subsidies are also initiated for LED Lighting Products.



3. Safe Disposal of Fluorescent Lamps

- China association of lighting industry advocates using solid mercury to replace liquid mercury and it has a remarkable effect.
- For example, this method greatly reduces the amount of mercury content in lamp tube so that reduce the mercury pollution during production.



3. Safe Disposal of Fluorescent Lamps

- China is now carrying out the standards revising project about the requirement of mercury content in fluorescent lamps.
- For example, in new revised CFL standards, the requirement of the amount of mercury content is under 2.5 mg. At present, the majority of Chinese CFL products could meet the standards.
- Moreover, the ratio of straight tube fluorescent lamp using solid mercury has greatly improved, which may added to future standards.



4. LED lighting in China

4.1 Enterprises:

- There are numerous enterprises in LED lighting industry, including traditional lighting manufactures, manufactures in LED extension chips and packaging, and other new LED lighting manufactures.
- The future will be the survival of the fittest.

Manufactures distribution





4. LED lighting in China

4.2 Product:

- Now, many manufactures are producing retrofit products. Such as LED bulb, MR16, PAR20, PAR30, PA38, LED Down Light, LED tube, LED streetlight, LED tunnel light etc.





4. LED lighting in China

4.3 Markets:

Domestic market

- Main application is LED street light and tunnel light.
- In commercial use is MR 16 and down light.
- Some LED tubes are used in shopping mall and underground parking lot.

Oversea market

- OEM is main way of producing light bulbs, MR16, PAR light, LED light tubes etc..
- Most world well-know brands have manufactures in China.



4. LED lighting in China

4.4 Government project

- **NDRC and MOF are initiating LED lighting subsidies project. This will promote the LED lighting application in domestic market.**
- **The project includes outdoor street light, tunnel light, indoor down light and PAR light.**





4. LED lighting in China

4.5 LED lighting Standards

- Chinese manufactures pay close attention in standardization work. Now several standards about LED lighting products have released. (see LIST)

	Standard No.	Standard Name
1	GB 19651.3-2008	Miscellaneous lamp holders-Part 2-2: Particular requirements-Connectors for LED-modules
2	GB 19510.14-2009	Lamp control gear-Part 2-13:Particular requirements for d.c. or a.c. supplied electronic control gear for LED modules
3	GB 24819-2009	LED modules for general lighting-Safety specifications
4	GB/T 24823-2009	LED modules for general lighting-Performance requirements



4. LED lighting in China

5	GB/T 24824-2009	Measurement methods of LED Modules for general lighting
6	GB/T 24825-2009	DC or AC supplied electronic control gear for LED modules-Performance requirements
7	GB/T 24826-2009	Terms and definitions of LEDs and LED modules for general lighting
8	GB 24906-2010	Self-ballasted LED-Lamps for general lighting services>50V safety specifications
9	GB/T 24908-2010	Self-ballasted LED-lamps for general lighting services-Performance requirements
10	GB/T 24907-2010	LED lamps for road lighting Performance specifications
11	GB/T 24909-2010	LED lamps for decorative lighting
12	QB/T 4057-2010	LEDs For General Lighting-Performance Requirements



4. LED lighting in China

- After IEC TC34 release its standards, China will release corresponded National Standards. In addition, a series of National standards and Industrial standards are carried out in China, such as down light, panel luminaries.
- We would like to cooperate with IEC, to future discuss standards about LED lighting product. Meanwhile, we expect that IEC could release relative LED lighting standards as quick as possible.

Thank You!