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Darnell Group

NEWS

Energy-Saving Electronic Ballasts Report from Darnell

Corona, California, September 27, 2005 – “*Global Electronic Ballast Markets: Technologies, Applications Trends and Competitive Environment, Fourth Edition*” has been released by Darnell Group Inc. This new updated 340-page report provides a detailed and in-depth examination of the electronic ballast market and the trends that drive this market. The report includes 201 tables of quantitative forecasts for unit sales, pricing trends and monetary sales as well as 127 graphs illustrating key trends. Electronic Ballast market opportunities and threats are exposed in an analysis of pertinent application trends, economic factors, regulatory changes (focused strongly on energy-saving opportunities), semiconductor advances, and technological threats.

The electronic ballast market is dynamic, consisting of six different technologies and spanning a wide range of applications. While some of the technologies may share the same or similar applications, each technology stands on its own, with its own unique market, drivers, trends and characteristics. Cold Cathode Fluorescent Lamps (CCFLs), Compact Fluorescent Lamps (CFLs), High-Intensity Discharge (HID) lamps, Linear Fluorescent, Light Emitting Diodes (LEDs) and Halogens all compete and complement one another within the \$10 billion electronic ballast market.

Unit sales for ballasts will grow at an average annual rate of 12.1% from 2005 to 2010. Driving the growth within the industry are various efficiency-related regulations, technology advances, lower prices, increased consumer demand, as well as a number of other factors. Each technology has a different focal point leading the technology forward, as each technological segment is forecasted to experience both unit and revenue growth over the next five years. Although some segments could be threatened by the advancements of new technologies, particularly by high-efficiency LEDs, each segment within the electronic ballast industry will remain strong over the period of the forecasts. For example, consumer demand for flat-panel computer monitors and flat-panel televisions is leading to explosive growth for the CCFL market. Estimated to have an average annual growth rate of 15.4% over the forecast period, the CCFL segment will have the most growth of any segment. Lower prices for both flat-panel monitors and flat-panel televisions is stimulating demand, with televisions showing the strongest growth of any application within any segment. Although the immediate future looks bright for CCFLs, the long-term may be a little gloomier with the emergence of LED backlighting. Although LED backlighting is currently limited, it is expected to become a cost-effective substitute to CCFLs, offering better color rendering and less power consumption.

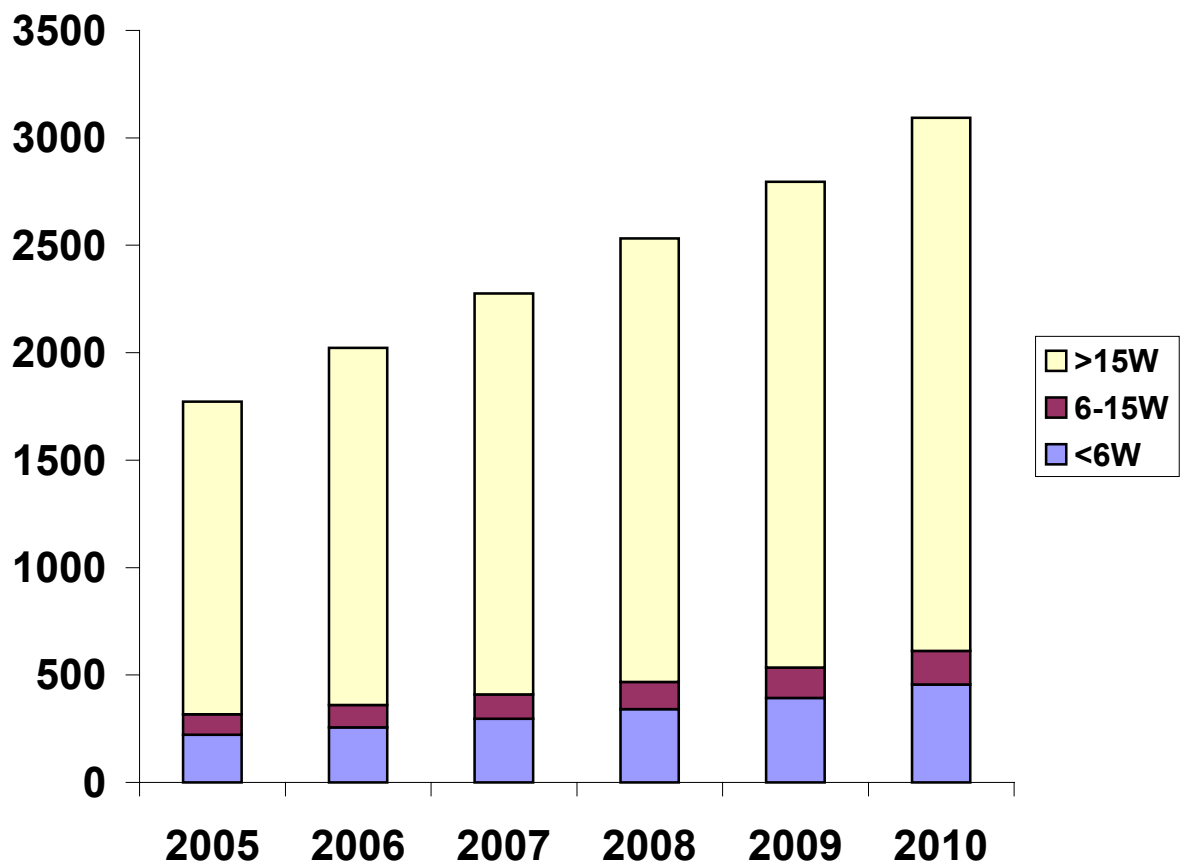
The report also analyzes the competitive environment in this market, including profiles of 19 electronic ballast manufacturers. In addition, the competitive analysis provides market share estimates by technology for the top competitors worldwide. Market share for the ballast industry varies from technology to technology, as each company tends to specialize in one particular area. Three companies, Philips, GE and OSRAM all maintain strong market shares across a platform of technologies; however, no company is in the top five of market share for all six technologies.

Darnell’s Electronic Ballasts report is now available. For more information, or to order the report, please contact Darnell by phone at (951) 279-6684 x240; by e-mail at tshepard@darnell.com; or visit http://www.darnell.com/consulting/study.php?mc_id=26 to view the abstract, outline and order form.

Darnell Group is the leading source for worldwide strategic information covering the full spectrum of power electronics, energy storage and generation. The company specializes in the economic/business analysis of emerging power markets and technologies.



Worldwide LED Electronic Ballast Market by Wattage (millions of dollars)



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