

DMX512 Controllers Global Market Analysis and Forecast (2010-2015)

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This study report, by ElectroniCast Consultants, provides the research findings of our study of the worldwide consumption and competitive landscape of DMX512 (Digital Multiplexing) Controllers used by multiple selected end-user groups.

DMX512-1990 is the accepted standard for controlling lighting equipment. The DMX standard was originated by the United States Institute for Theatre Technology but is now maintained by the Entertainment Services and Technology Association (ESTA) and its Control Protocols Working Group. In this study, we examined the DMX standard(s) and other relative industry standards.

The American National Standards Institute (ANSI) approved a revised standard, known officially as “Entertainment Technology —USITT DMX512-A — Asynchronous Serial Digital Data Transmission Standard for Controlling Lighting Equipment and Accessories, in November 2004 (E1.11-2004).

The market review and forecast (2010-2015) is presented for the use of DMX512 controllers, segmented by the following functions:

- Consumption Value (US\$, million)
- Quantity (number of units, in thousands)
- Average Selling Prices (ASP \$, each)

The consumption value is determined by multiplying the number of units by the average selling price. The average selling prices are based on the price at the initial factory level. The regional consumption values are based where the DMX512 unit is actually used (consumed), not necessarily where it is produced.

The market data are segmented into the following geographic regions, plus a Global summary:

- The Americas (North America, Central and South America)
- EMEA (Europe, Middle Eastern countries, plus Africa)
- APAC (Asia Pacific)

This report also presents for the use of DMX512 controllers, by the following device types:

- Hand-Held, Mini or Mini-Wall mountable
- Tabletop Consoles (Operator console)
- Rack-Mountable or Other Mountable (often fabricated as an Operator console)

Multiple End-User Groups Sure, DMX512 controllers are purchased and used by DJs on the dance floor and Theater companies for the purpose of providing creative/artist-driven lighting effects; however, other consumer groups participate in this dynamic marketplace. ElectroniCast Consultants, in this study, present the 2010 market consumption (use) review and the five-year forecast segmented by the following end-use consumer groups:

- Civic, Social and Religious Organizations
- Bars / Nightclubs / Restaurants
- Hotels and Casinos (excludes above category)
- Amusement / Spectator Sports / Convention / Arenas / Concerts
- Schools / Colleges / Universities / Museums / Galleries / Similar
- Performing Arts / Dance / Stage / Theatre / Dinner Theatre
- Architectural / Structures / Landscape / Interior Design Lighting
- Signage / Display Advertising / Retail Stores
- Motion Pictures / Broadcasting/ Video / Photography Production
- Other / Non Specific

Commercial product note: This study covers non-military products

Additionally, ElectroniCast presents an overview relative to the following components and devices, which are used in DMX512 lighting systems:

- Cable Assemblies/Connectors/Adapters/Terminators
- Wireless

- Printed Circuit Boards/Modules
 - Controller
 - Switches
 - Relay
 - Splitter/Transmitter/Receiver
 - Servo/Driver Board; PWM and Stepper Motor Driver
 - Interface Module
 - Wireless

The following emerging technologies and market drivers are discussed for the following DMX512 contributors:

- Hardware
 - Chips
 - PCBs
 - Systems
- Software
- Sales/Distribution/Channels

According to ElectroniCast Consultants, the total consumption value is forecast increase with rising quantity growth partially offset by declining average prices. The consumption value is forecast to increase (2x) at an average annual growth rate of 15.9 from 2010-2015. Note: Market forecast data in this study report refers to consumption (use) for a particular calendar year; therefore, this data is not cumulative data.

The Asia Pacific region (APAC), in 2010, was the market share leader in worldwide consumption value of DMX512 controllers; however, the American region is forecast to capture the lead in relative market share, at least in terms of consumption value.

In terms of volume (quantity/number of units), the Asia Pacific region is forecast to maintain its lead in the worldwide marketplace; however both America and the Europe, Middle East, Africa (EMEA) region will increase slightly faster during the forecast period (2010-2015). The APAC region tends to pay lower average selling prices (ASPs) for the various DMX512 controllers.

The American market (South, Central and North America), which spends a premium price, usually based on premium quality with the demand for more features and durability, is forecast to improve it's market share position from to over 40% in the year 2015. The region consisting of European, Middle East and African countries (EMEA) is forecast to grow at the fastest annual pace (18.25%) during the forecast period (2010-2015).

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6.1 Profiles of Selected DMX512 Competitors and Related Companies

The following is a list of DMX512 Controller manufacturers and related companies, which are profiled in this chapter:

AbstractAVR
Acclaim Lighting Llc
Acuity Brands Lighting, Inc. (ABL)
ADB Lighting Technologies
Agilent Technologies
Alcorn McBride, Incorporated
AlphaWire Company
American DJ Group of Companies (ADJ)
 Accu-Cable
 American Audio
 American DJ Supply, Inc
 Arriba Cases
 Elation Lighting, Inc.
 Eliminator Lighting, LLC
 Global Truss
Analog Devices, Inc.
Applied Electronics
Apollo Design Technology, Inc.
Artistic Licence
Astera LED Technology
Avolites
Baihong Lighting & Acoustic Co., Ltd. (Guangzhou)
Baxter Controls, Inc. (BCI)
Behringer EuroLight
Belden, Incorporated
Blue Point Engineering LLC
Bright-Land Enterprises Inc., Limited
Candela Controls, Inc.
Chauvet
City Theatrical, Incorporated (CTI)
Coemar S.p.A.
ColorMaker, Inc.
Compulite
Cooper Industries, Inc.
 Cooper Controls
 Electronics Diversified, Inc. (EDI)
 Zero 88
 Greengate
 iLumin
Crestron Electronics, Inc.
Cypress Semiconductor Corporation
Deshun Technology Co. Ltd. (Guangzhou)
De Sisti Lighting
Diodes Inc.
Diversitronics
DMXSoft
Doug Fleenor Design, Incorporated
Durand Interstellar, Inc.
eldoLED B.V.

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Electronic Test Equipment Manufacturing Company (ETEMCO)

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Electronic Theatre Controls, Inc. (ETC)
Element Labs™
Entertainment Networks™ (Edwin Jones Company)
ETTEC
Euchips Industrial Co., Ltd. (Shanghai)
Exar Corporation
Fore-sight Power Co., Ltd (Shenzhen)
Freescale Semiconductor, Inc.
General Cable Corporation (Gepco)
Goddard Design Company
Great Performance Products
GuangTek Industrial Co.Ltd.
Hanhui (HK) International Limited (Winpower)
Hedong Electronic Company (Guangzhou); Smart-HDL
High End Systems (Barco Lighting Systems, Inc.); Flying Pig Systems
HiLine Lighting
Hosa Technology, Inc.
Howard Eaton Lighting Ltd (HELL)
Illusion LED Limited
Inoage Dresden (MADRIX® brand).
Integrated Controls Inc.
Interactive Technologies
Johnson Systems Incorporated (JSI)
Lanbolight Technology Co., Ltd. (Guangzhou)
LED Dynamics
Lehigh Electric Products Company
Le Maitre Limited
Leprecon (CAE)
Leviton Manufacturing Co., Inc.
Lex Products
Lighting & Electronic Design, Inc. (L.E.D.)
Lighting & Electronics, Incorporated (L&E)
Lightronics
Lite-Puter
LSC Lighting Systems
LumiDesk
LynTec
MA Lighting
Martin Professional A/S
Marvell Technology Group Ltd.
Melexis Microelectronic Systems
Microchip Technology Inc.
Mole-Richardson Company
National Semiconductor
NEC Electronics
Nexus Lighting (ALS)
Nicolaudie-Sunlite
Northlight Systems
NXP Semiconductors
ON Semiconductor Corporation
Optima Lighting Incorporated
Pathway Connectivity
Peperoni
Phoenix Lighting Company, Limited (Guangdong)

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Philips

Philips (Dynalite) – Royal Philips Electronics
Philips – Entertainment Technology (Philips Group Brand)
Philips – Lightolier® Controls (Philips Group Brand)
Philips Lumileds Lighting Company
Philips Solid-State Lighting Solutions – Color Kinetics
Philips - NXP
Philips Lighting TIR Systems Ltd (TIR Systems Ltd.)
Philips Electronics (Royal Philips Electronics)
Philips – Strand Lighting (Royal Philips Electronics)

QuickSilver Controls
Renesas Electronics Corporation / Renesas Electronics Europe
ROAL Electronics S.p.A.
Semiconductor Device Solution, Inc. (SDS)
SGM Technology
Signcomplex Limited (Signcomplex)
SOH Sound & Lights svět očima hudby
Stagecraft Industries, Inc.
Starwire lighting Co., Ltd
STMicroelectronics
Strong Entertainment Lighting (Ballantyne Strong, Inc.)
SUREPRO Audio & Light Industrial Co., Limited
Syncrolite™
Synthe FX, LLC
Techni-Lux, Inc
TEI Electronics Inc
Texas Instruments
TMB
Tryka L.E.D. Ltd
Union-Bright Stage Lighting Equipment Co., Ltd (Guangzhou)
Union Connector
Velleman® nv
Watt Stopper-Legrand
Wireless Solution Sweden AB
Wybron, Incorporated
XTBA Ltd

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