



LED Professional Production Lighting in Broadcast, Videography & Motion Pictures United States Market Forecast

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This is the ElectroniCast 2010-2017 forecast of the use of light emitting diode (LED) production lighting devices in broadcast TV, motion pictures and videography in the United States (professional use – *only*). The light emitting diode (LED) market, despite exciting innovative devices driven by technological advances and ecological/energy-saving concerns, still face challenges in overcoming performance/price limitations and in attracting widespread consumption.

LED lighting is well accepted by the broadcast TV, motion pictures and videography industry sectors for lighting effects and set lighting, mainly because of its flexibility. A single light source can generate a great variety of colors. Additionally, continuous cost/performance improvements driven by technological advancements are driving the LED lighting fixture market from a niche-only solution to a general use solution.

Another benefit, directly related to the use of lighting in studios and sets, is the consumption of less electrical power consumption for not only because LEDs use less energy, but also less air conditioning is required since heat generated by an LED bulb is negligible. Also, television broadcasters and film studios are proud to publicize that they are good corporate citizens by incorporating LEDs in their operations and thereby embracing “Green Technology.”

The market forecast data are presented for LED lighting fixture (including the factory-installed Lamps/bulbs), segmented by the following functions:

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

Note: Only the LED lamp and immediate fixture is include in values; therefore, racks, stands, carry bags/boxes, external cables/controllers, transformers, service, etc are not included.

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 of the LED light fixture at the initial factory level. The consumption values are based on the end-user application. The market data are segmented into the following end-user groups (applications):

- Broadcast Television
- Motion Pictures (Cinematography)
- Videography

In 2011, the broadcast TV, motion pictures and videography industry sectors employ over 50,000 camera operators in the United States. Independent television stations, local affiliate stations of television networks or broadcast groups, large cable and television networks, or smaller, independent production companies, employ camera operators. There also are a large number of self-employed camera operators and film editors. Some self-employed camera operators contract with television networks, documentary or independent filmmakers, advertising agencies, or trade show or convention sponsors to work on individual projects for a set fee, often at a daily rate.

Videographers film or videotape private ceremonies and special events, such as weddings. Some record and post short videos on Web sites for businesses. Studio camera operators work in a broadcast studio and usually videotape their subjects from a fixed position. News camera operators, also called electronic news gathering (ENG) operators, work as part of a reporting team, following newsworthy events as they unfold. To capture live events, they must anticipate the action and act quickly.

Camera operators employed in the entertainment field use motion picture cameras to film movies, television programs, and commercials. Those who film motion pictures also are known as cinematographers.

In terms of value the USA consumption of LED professional use production light panels/fixtures in the TV broadcast, motion picture/film and videographers (weddings, events, business promotions, etc) was led by the motion picture industry sector with a 60% relative market share in 2010 (see Figure 1).

Figure 1
LED Production Light Panels/Fixtures
United States Consumption Value Market Share, By Application
(2010)

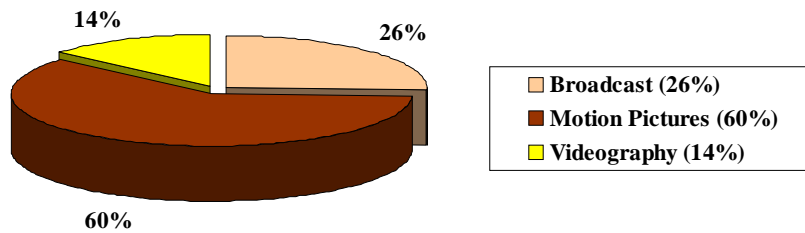


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