

Stage Lighting Market - Global Outlook and Forecast 2023-2028

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Report description:

The global stage lighting market is expected to grow at a CAGR of 4.55% from 2022 to 2028

MARKET TRENDS & OPPORTUNITIES

Night Clubs, Bars, And Resto Bars Gaining Traction In APAC

The ever-changing trend in people's lifestyles and behavior has contributed to the growing popularity of bars and pubs in the APAC countries. Consumer lifestyle is changing with the rising IT and BPO sectors in India and other APAC countries. Such factors have resulted in rising disposable income, which the younger generation is ready to spend on leisure and entertainment and visit pubs, nightclubs, resto-bars very often. The economic impact of the nightclub industry extends far to the stage lighting market.

Increased Demand For Technically Advanced Products

The stage lighting market is driven by technologically reformed products and has witnessed a range of new features penetrating its value chain. A vast range of products is making a difference across the industry due to continuous innovation and quality improvements. Technology has been an integral part of this market, from traditional lamps to modern-day smart wireless light controllers.

INDUSTRY RESTRAINTS

Volatility In Raw Material Prices

Raw materials constitute the single largest cost component in the stage lighting fixtures and control solutions market, comprising approximately 40% to 60% of the overall cost of production. Prices of major raw materials used to manufacture stage lighting fixtures and control solutions, such as steel, aluminum, plastic, and rubber, have increased significantly over the last few years.

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The volatility of raw material prices also seriously threatens vendor profit margins in the stage lighting market. Other operating expenses, such as labor wages, are also rising. Rising raw materials cost further surged manufacturing costs by another band of 5% to 7%, narrowing profit margins. Adding to all these costs, Chinese manufacturers add more worries to the company's top line as they bring up low-cost products. These factors burden vendors that strive to produce efficient stage lighting solutions at affordable costs to cope with increasing market competition.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global stage lighting market by product type is categorized into stage lighting fixtures and stage lighting control. The stage lighting fixtures is the dominating market and was valued at USD 2.03 billion in 2022. Stage lighting fixtures are a key component in live performances and events. They are designed to provide a controlled light source to enhance the audience's visual experience. They include traditional incandescent lights, LED lights, moving head lights, and more.

Segmentation by Product

- Lighting Fixture
- Lighting Controller

INSIGHTS BY STAGE LIGHTING FIXTURE

The global PARs stage lighting market was valued at USD 417.56 million in 2022. PARs are the most widely used fixtures in concert lighting and theatrical performances. Often called PAR cans, these fixtures have beam lamps held by aluminum-coated metal hoods of parabolic shape. Most of these fixtures produce a soft-edged oval or circular pool of lights. Various lamps can be used to produce different beam shapes and sizes. Concerning functionality, PARs are one of the market's most cost-efficient stage lighting fixtures with few features such as focus or shuttering.

Segmentation by Stage Lighting Fixture

- Lighting Fixture
 - o□ PARs
 - o□ Striplights & Cyc Lights
 - o□ Ellipsoidals
 - o□ Fresnels
 - o□ Followspots
 - o□ Beam Projectors
 - o□ Scoops
- Fixture Movement
 - o□ Automated/ Intelligent Fixtures
 - o□ Static Fixtures
- Light Source
 - o□ Conventional Stage Lighting
 - o□ LED Stage Lighting

INSIGHTS BY LIGHTING CONTROL SYSTEMS

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The global stage lighting market by lighting control systems was valued at USD 489.88 million in 2022. Stage lighting control systems have been developed from the era when they required multiple assistants to control stage lighting during concerts, stage shows, and other events. The advent of intelligent stage lighting control systems helps vendors overcome the problems associated with traditional systems, such as high cost, low intelligence, and cost associated with installation and deployment, among others. An intelligent lighting control system has a user interface that is designed in such a way that it makes controlling stage lighting fixtures easy and convenient.

Segmentation by Lighting Control Systems

- Stage Lighting Controllers
- Stage Lighting Visualizers

INSIGHTS BY END-USERS

The touring rental segment dominated the stage lighting market with a share of 64.94% in 2022. Touring rental refers to providing lighting equipment and services for live events, concerts, and tours. This segment is driven by the increasing popularity of live events and the need for lighting solutions that can be easily transported and set up in different venues. Touring rental companies typically offer a wide range of lighting fixtures and control systems to meet the specific needs of each event. They also provide skilled technicians to operate and maintain the equipment.

Segmentation by End-Users

- Touring Rental
- Fixed installation

INSIGHTS BY APPLICATION TYPE

Concerts application dominated the global stage lighting market, accounting for a 56% share. The increasing number of live performances, the growing number of music concerts and festivals, and the growth in the number of music tours by celebrities will help this segment to gain some market share during the forecast period. Pop, classical, and jazz concerts are the most famous concerts worldwide; this has also been noticed that the highest number of pop music concerts are held in Italy.

Segmentation by Application

- Concerts
- Corporate Events
- Broadcast Industry
- Weddings/Events
- Hospitality Industry
- Architectural and Commercial Installs
- Houses of Worship
- DJ Retail/Rec DJ
- Theatres
- Fitness Sports
- Nightclubs

INSIGHTS BY DISTRIBUTION CHANNEL

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The distribution channel of the global stage lighting market is fragmented dynamically. The various products used for the stage lighting market, such as LED lights, fixtures, and controllers, are marketed and distributed using various channels. With thousands of new competitors entering the market, the pre-established distribution channels have drastically changed. Currently, consumers have a wide variety of options (i.e., touring rentals and fixed installers). They can avail products either directly from manufacturers or online on the internet. Companies like Philips have attained a reputable name in the industry due to their robust distribution channel. The company even increased its service centers from 125 to 190 and has more than 900 technicians enlisted to provide support and resolve customer queries.

Segmentation by Distribution Channel

- Manufacturer And Channel Partners
- Distributors In The Channel Network
- Retail Distribution In the Lighting Industry
- Online Distribution Channel Network

GEOGRAPHICAL ANALYSIS

North America was the largest segment of the global stage lighting market, accounting for a share of 34.82%. The penetration of stage lighting fixtures remains at an all-time high in the U.S. and Canada, with the U.S. holding the maximum market share of 63.70%. Factors such as the high spending power of millennials and boomers, growing participation in music festivals, increased adoption of smartphones, inclination toward new technology, and high urbanization are driving industry growth in North America.

Segmentation by Geography

- North America
 - o□US
 - o□Canada
- Europe
 - o□UK
 - o□Germany
 - o□France
 - o□Italy
 - o□Spain
 - o□Nordics
 - o□Rest of Europe
- APAC
 - o□Japan
 - o□China
 - o□Australia
 - o□South Korea
 - o□India
 - o□Rest of APAC
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Rest of Latin America

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- Middle East & Africa
- o□Saudi Arabia
- o□UAE
- o□South Africa
- o□Rest of the Middle East & Africa

VENDOR LANDSCAPE

The global stage lighting market is highly fragmented, with many local and international players. The competition among these players is intense. The rapidly changing technological environment can adversely affect vendors as customers expect continual innovations and upgrades in LED fixtures. The present scenario forces vendors to alter and refine their unique value proposition to achieve a strong market presence. The leading vendors in the industry are Philips Lighting, OSRAM, and HARMAN International (Samsung). The competition among these key players is intense.

Key Company Profiles

- HARMAN International (Samsung)
- OSRAM
- Signify Holding (Philips)

Other Prominent Vendors

- Absen America
- Altman Lighting
- ANTARI LIGHTING ? EFFECTS
- Apollo Design Technology
- Ayrton
- Blizzard Lighting
- Chauvet Professional
- Chroma-Q
- City Theatrical
- Core Lighting
- Dexel
- Eaton Electrical Systems
- Elektralite
- Elation Professional
- ENTTEC
- Epsilon Professional Lighting
- ETC
- German Light Products
- Golden Sea Professional Equipment
- Kumho Electric
- Leprecon
- Litetronics International
- Lycian Stage Lighting
- MA Lighting Technology
- Mighty Bright

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- []MLS
- []Nicolaudie
- []Pathway Connectivity
- []PROEL
- []Red Lighting
- []Rosco
- []SGM Light A/S
- []Studio Due
- []Techni-Lux
- []Teclumen
- []Ultra-Tech Lighting
- []Ushio Lighting
- []Zumtobel Group
- []Robert Juliat

KEY QUESTIONS ANSWERED:

- 1.[]How big is the stage lighting market?
- 2.[]What is the growth rate of the stage lighting market?
- 3.[]Who are the key players in the global stage lighting market?
- 4.[]What are the key driving factors in the stage lighting market?
- 5.[]Which region dominates the global stage lighting market?

Table of Contents:

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 MARKET DEFINITION

4.1.1 INCLUSIONS

4.1.2 EXCLUSIONS

4.1.3 MARKET ESTIMATION CAVEATS

4.2 BASE YEAR

4.3 SCOPE OF THE STUDY

4.3.1 MARKET SEGMENTATION BY PRODUCT

4.3.2 MARKET SEGMENTATION BY END-USE

4.3.3 MARKET SEGMENTATION BY APPLICATION

4.3.4 MARKET SEGMENTATION BY GEOGRAPHY

5 REPORT ASSUMPTIONS & CAVEATS

5.1 KEY CAVEATS

5.2 CURRENCY CONVERSION

5.3 MARKET DERIVATION

6 PREMIUM INSIGHTS

6.1 REPORT OVERVIEW

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6.2	INDUSTRY INSIGHTS
6.3	OPPORTUNITY & CHALLENGE ANALYSIS
6.4	SEGMENT ANALYSIS
6.5	REGIONAL ANALYSIS
6.6	COMPETITIVE LANDSCAPE
7	MARKET AT A GLANCE
8	INTRODUCTION
8.1	OVERVIEW
8.1.1	STAGE LIGHTING VARIABLES
8.1.2	STAGE LIGHTING FUNCTIONS
8.1.3	PROTOCOLS
8.1.4	SPECIAL EFFECTS
8.1.5	KEY TERMINOLOGIES
8.2	MACROECONOMIC FACTORS THAT ENABLE MARKET GROWTH
8.2.1	ECONOMIC DEVELOPMENT
8.2.2	PER CAPITA GDP IN DEVELOPING MARKETS
8.2.3	DUAL-INCOME HOUSEHOLDS IN DEVELOPED MARKETS
8.3	VALUE CHAIN ANALYSIS
8.3.1	RAW MATERIAL SUPPLIERS
8.3.2	MANUFACTURERS
8.3.3	DISTRIBUTORS & WHOLESALERS
8.3.4	RETAILERS & DEALERS
8.3.5	END-USERS
8.3.6	SERVICE PROVIDERS
8.4	IMPORTANCE OF STAGE LIGHTING IN SPORTS
8.4.1	BEIJING OLYMPICS 2022
8.4.2	INTERNATIONAL CRICKET COUNCIL (ICC) MEN'S T20 WORLD CUP 2022
8.4.3	FIFA 2022
9	DISTRIBUTION CHANNEL
9.1	AN OVERVIEW
9.2	MANUFACTURERS & CHANNEL PARTNERS
9.3	DISTRIBUTORS
9.4	RETAIL DISTRIBUTION
9.5	ONLINE DISTRIBUTION
10	MARKET OPPORTUNITIES & TRENDS
10.1	ADOPTION OF SMART WIRELESS LIGHTING CONTROL
10.2	INCREASED NUMBER OF SPORTS EVENTS
10.3	CONVERGENCE OF PRO AV & IOT
10.4	POPULARITY OF NIGHTCLUBS, BARS & RESTO BARS IN APAC
10.5	INCREASED EXHIBITIONS, CONFERENCES & SEMINARS
11	MARKET GROWTH ENABLERS
11.1	EXPANSION OF MUSIC INDUSTRY & DEMAND FOR LIVE PERFORMANCES
11.2	DEMAND FOR TECHNOLOGICALLY ADVANCED PRODUCTS

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11.3 DEMAND FOR LED STAGE LIGHTS

12 MARKET RESTRAINTS

12.1 VOLATILITY IN RAW MATERIAL PRICES

12.2 INCREASED LABOR COST & COST TRADE-OFFS

12.3 POLITICAL TURBULENCE IN KEY MARKETS

13 MARKET LANDSCAPE

13.1 MARKET OVERVIEW

13.2 MARKET BY GEOGRAPHY

13.3 MARKET SIZE & FORECAST

13.4 FIVE FORCES ANALYSIS

13.4.1 THREAT OF NEW ENTRANTS

13.4.2 BARGAINING POWER OF SUPPLIERS

13.4.3 BARGAINING POWER OF BUYERS

13.4.4 THREAT OF SUBSTITUTES

13.4.5 COMPETITIVE RIVALRY

14 PRODUCT

14.1 MARKET SNAPSHOT & GROWTH ENGINE

14.2 MARKET OVERVIEW

15 LIGHTING FIXTURES

15.1 MARKET SNAPSHOT & GROWTH ENGINE

15.2 MARKET OVERVIEW

15.2.1 LIGHTING FIXTURES: MARKET BY GEOGRAPHY

15.3 PARS

15.3.1 MARKET SIZE & FORECAST

15.3.2 PARS: MARKET BY GEOGRAPHY

15.4 STRIPLIGHTS & CYC LIGHTS

15.4.1 MARKET SIZE & FORECAST

15.4.2 STRIPLIGHTS & CYC LIGHTS: MARKET BY GEOGRAPHY

15.5 ELLIPSOIDALS

15.5.1 MARKET SIZE & FORECAST

15.5.2 ELLIPSOIDALS: MARKET BY GEOGRAPHY

15.6 FRESNELS

15.6.1 MARKET SIZE & FORECAST

15.6.2 FRESNELS: MARKET BY GEOGRAPHY

15.7 FOLLOWSPOTS

15.7.1 MARKET SIZE & FORECAST

15.7.2 FOLLOWSPOTS: MARKET BY GEOGRAPHY

15.8 BEAM PROJECTORS

15.8.1 MARKET SIZE & FORECAST

15.8.2 BEAM PROJECTORS: MARKET BY GEOGRAPHY

15.9 SCOOPS

15.9.1 MARKET SIZE & FORECAST

15.9.2 SCOOPS: MARKET BY GEOGRAPHY

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- 15.10 FIXTURE MOVEMENT
 - 15.10.1 MARKET OVERVIEW
 - 15.10.2 AUTOMATED/INTELLIGENT FIXTURES: MARKET SIZE & FORECAST
 - 15.10.3 AUTOMATED/INTELLIGENT FIXTURES: MARKET BY GEOGRAPHY
 - 15.10.4 STATIC FIXTURES: MARKET SIZE & FORECAST
 - 15.10.5 STATIC FIXTURES: MARKET BY GEOGRAPHY
- 15.11 LIGHTING SOURCE
 - 15.11.1 MARKET OVERVIEW
 - 15.11.2 CONVENTIONAL LIGHTING: MARKET SIZE & FORECAST
 - 15.11.3 CONVENTIONAL LIGHTING: MARKET BY GEOGRAPHY
 - 15.11.4 LED LIGHTING: MARKET SIZE & FORECAST
 - 15.11.5 LED LIGHTING: MARKET BY GEOGRAPHY

- 16 LIGHTING CONTROL SYSTEMS
 - 16.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 16.2 MARKET OVERVIEW
 - 16.2.1 LIGHTING CONTROL SYSTEMS: MARKET BY GEOGRAPHY
 - 16.3 CONTROLLERS
 - 16.3.1 MARKET SIZE & FORECAST
 - 16.3.2 CONTROLLERS: MARKET BY GEOGRAPHY
 - 16.4 VISUALIZERS
 - 16.4.1 MARKET SIZE & FORECAST
 - 16.4.2 VISUALIZERS: MARKET BY GEOGRAPHY

- 17 END-USE
 - 17.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 17.2 MARKET OVERVIEW
 - 17.3 TOURING RENTAL
 - 17.3.1 MARKET SIZE & FORECAST
 - 17.3.2 TOURING RENTAL: MARKET BY GEOGRAPHY
 - 17.4 FIXED INSTALLATION
 - 17.4.1 MARKET SIZE & FORECAST
 - 17.4.2 FIXED INSTALLATION: MARKET BY GEOGRAPHY

- 18 APPLICATION
 - 18.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 18.2 MARKET OVERVIEW
 - 18.3 CONCERTS
 - 18.3.1 MARKET SIZE & FORECAST
 - 18.3.2 MARKET BY GEOGRAPHY
 - 18.4 CORPORATE EVENTS
 - 18.4.1 MARKET SIZE & FORECAST
 - 18.4.2 MARKET BY GEOGRAPHY
 - 18.5 BROADCAST INDUSTRY
 - 18.5.1 MARKET SIZE & FORECAST
 - 18.5.2 MARKET BY GEOGRAPHY
 - 18.6 WEDDINGS/ EVENTS

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- 18.6.1 MARKET SIZE & FORECAST
- 18.6.2 MARKET BY GEOGRAPHY
- 18.7 HOSPITALITY INDUSTRY
 - 18.7.1 MARKET SIZE & FORECAST
 - 18.7.2 MARKET BY GEOGRAPHY
- 18.8 ARCHITECTURAL & COMMERCIAL INSTALLS
 - 18.8.1 MARKET SIZE & FORECAST
 - 18.8.2 MARKET BY GEOGRAPHY
- 18.9 HOUSES OF WORSHIP
 - 18.9.1 MARKET SIZE & FORECAST
 - 18.9.2 MARKET BY GEOGRAPHY
- 18.10 DJ RETAIL/REC DJ
 - 18.10.1 MARKET SIZE & FORECAST
 - 18.10.2 MARKET BY GEOGRAPHY
- 18.11 THEATERS
 - 18.11.1 MARKET SIZE & FORECAST
 - 18.11.2 MARKET BY GEOGRAPHY
- 18.12 FITNESS/SPORTS
 - 18.12.1 MARKET SIZE & FORECAST
 - 18.12.2 MARKET BY GEOGRAPHY
- 18.13 NIGHTCLUBS
 - 18.13.1 MARKET SIZE & FORECAST
 - 18.13.2 MARKET BY GEOGRAPHY
- 19 GEOGRAPHY
 - 19.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 19.2 GEOGRAPHIC OVERVIEW
- 20 NORTH AMERICA
 - 20.1 PEST ANALYSIS
 - 20.1.1 POLITICAL
 - 20.1.2 ECONOMIC
 - 20.1.3 SOCIAL
 - 20.1.4 TECHNOLOGICAL
 - 20.2 MARKET SIZE & FORECAST
 - 20.3 PRODUCT
 - 20.3.1 MARKET SIZE & FORECAST
 - 20.3.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 20.3.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST
 - 20.3.4 LIGHTING SOURCE: MARKET SIZE & FORECAST
 - 20.3.5 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 20.4 END-USE
 - 20.5 APPLICATION
 - 20.6 KEY COUNTRIES
 - 20.6.1 US: MARKET SIZE & FORECAST
 - 20.6.2 PRODUCT: MARKET SIZE & FORECAST
 - 20.6.3 LIGHTING FIXTURES: MARKET SIZE & FORECAST

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- 20.6.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 20.6.5 END-USE: MARKET SIZE & FORECAST
- 20.6.6 CANADA: MARKET SIZE & FORECAST
- 20.6.7 PRODUCT: MARKET SIZE & FORECAST
- 20.6.8 LIGHTING FIXTURES: MARKET SIZE & FORECAST
- 20.6.9 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 20.6.10 END-USE: MARKET SIZE & FORECAST

21 EUROPE

21.1 PEST ANALYSIS

21.1.1 POLITICAL

21.1.2 ECONOMIC

21.1.3 SOCIAL

21.1.4 TECHNOLOGICAL

21.2 MARKET SIZE & FORECAST

21.3 PRODUCT

21.3.1 MARKET SIZE & FORECAST

21.3.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST

21.3.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST

21.3.4 LIGHTING SOURCE: MARKET SIZE & FORECAST

21.3.5 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

21.4 END-USE

21.5 APPLICATION

21.6 KEY COUNTRIES

21.6.1 UK: MARKET SIZE & FORECAST

21.6.2 PRODUCT: MARKET SIZE & FORECAST

21.6.3 LIGHTING FIXTURES: MARKET SIZE & FORECAST

21.6.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

21.6.5 END-USE: MARKET SIZE & FORECAST

21.6.6 GERMANY: MARKET SIZE & FORECAST

21.6.7 PRODUCT: MARKET SIZE & FORECAST

21.6.8 LIGHTING FIXTURES: MARKET SIZE & FORECAST

21.6.9 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

21.6.10 END-USE: MARKET SIZE & FORECAST

21.6.11 FRANCE: MARKET SIZE & FORECAST

21.6.12 PRODUCT: MARKET SIZE & FORECAST

21.6.13 LIGHTING FIXTURES: MARKET SIZE & FORECAST

21.6.14 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

21.6.15 END-USE: MARKET SIZE & FORECAST

21.6.16 ITALY: MARKET SIZE & FORECAST

21.6.17 PRODUCT: MARKET SIZE & FORECAST

21.6.18 LIGHTING FIXTURES: MARKET SIZE & FORECAST

21.6.19 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

21.6.20 END-USE: MARKET SIZE & FORECAST

21.6.21 SPAIN: MARKET SIZE & FORECAST

21.6.22 PRODUCT: MARKET SIZE & FORECAST

21.6.23 LIGHTING FIXTURES: MARKET SIZE & FORECAST

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- 21.6.24 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 21.6.25 END-USE: MARKET SIZE & FORECAST
- 21.6.26 NORDIC COUNTRIES: MARKET SIZE & FORECAST
- 21.6.27 PRODUCT: MARKET SIZE & FORECAST
- 21.6.28 LIGHTING FIXTURES: MARKET SIZE & FORECAST
- 21.6.29 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 21.6.30 END-USE: MARKET SIZE & FORECAST
- 21.6.31 REST OF EUROPE: MARKET SIZE & FORECAST
- 21.6.32 PRODUCT: MARKET SIZE & FORECAST
- 21.6.33 LIGHTING FIXTURES: MARKET SIZE & FORECAST
- 21.6.34 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 21.6.35 END-USE: MARKET SIZE & FORECAST

22 APAC

22.1 PEST ANALYSIS

22.1.1 POLITICAL

22.1.2 ECONOMIC

22.1.3 SOCIAL

22.1.4 TECHNOLOGICAL

22.2 MARKET SIZE & FORECAST

22.3 PRODUCT

22.3.1 MARKET SIZE & FORECAST

22.3.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST

22.3.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST

22.3.4 LIGHTING SOURCE: MARKET SIZE & FORECAST

22.3.5 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

22.4 END-USE

22.5 APPLICATION

22.6 KEY COUNTRIES

22.6.1 CHINA: MARKET SIZE & FORECAST

22.6.2 PRODUCT: MARKET SIZE & FORECAST

22.6.3 LIGHTING FIXTURES: MARKET SIZE & FORECAST

22.6.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

22.6.5 END-USE: MARKET SIZE & FORECAST

22.6.6 JAPAN: MARKET SIZE & FORECAST

22.6.7 PRODUCT: MARKET SIZE & FORECAST

22.6.8 LIGHTING FIXTURES: MARKET SIZE & FORECAST

22.6.9 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

22.6.10 END-USE: MARKET SIZE & FORECAST

22.6.11 AUSTRALIA: MARKET SIZE & FORECAST

22.6.12 PRODUCT: MARKET SIZE & FORECAST

22.6.13 LIGHTING FIXTURES: MARKET SIZE & FORECAST

22.6.14 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

22.6.15 END-USE: MARKET SIZE & FORECAST

22.6.16 SOUTH KOREA: MARKET SIZE & FORECAST

22.6.17 PRODUCT: MARKET SIZE & FORECAST

22.6.18 LIGHTING FIXTURES: MARKET SIZE & FORECAST

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- 22.6.19 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 22.6.20 END-USE: MARKET SIZE & FORECAST
- 22.6.21 INDIA: MARKET SIZE & FORECAST
- 22.6.22 INDIA: MARKET SIZE & FORECAST
- 22.6.23 PRODUCT: MARKET SIZE & FORECAST
- 22.6.24 LIGHTING FIXTURES: MARKET SIZE & FORECAST
- 22.6.25 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 22.6.26 END-USE: MARKET SIZE & FORECAST
- 22.6.27 REST OF APAC: MARKET SIZE & FORECAST
- 22.6.28 PRODUCT: MARKET SIZE & FORECAST
- 22.6.29 LIGHTING FIXTURES: MARKET SIZE & FORECAST
- 22.6.30 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
- 22.6.31 END-USE: MARKET SIZE & FORECAST

23 LATIN AMERICA

23.1 PEST ANALYSIS

23.1.1 POLITICAL

23.1.2 ECONOMIC

23.1.3 SOCIAL

23.1.4 TECHNOLOGICAL

23.2 MARKET SIZE & FORECAST

23.3 PRODUCT

23.3.1 MARKET SIZE & FORECAST

23.3.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST

23.3.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST

23.3.4 LIGHTING SOURCE: MARKET SIZE & FORECAST

23.3.5 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

23.4 END-USE

23.5 APPLICATION

23.6 KEY COUNTRIES

23.6.1 BRAZIL: MARKET SIZE & FORECAST

23.6.2 PRODUCT: MARKET SIZE & FORECAST

23.6.3 LIGHTING FIXTURES: MARKET SIZE & FORECAST

23.6.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

23.6.5 END-USE: MARKET SIZE & FORECAST

23.6.6 MEXICO: MARKET SIZE & FORECAST

23.6.7 PRODUCT: MARKET SIZE & FORECAST

23.6.8 LIGHTING FIXTURES: MARKET SIZE & FORECAST

23.6.9 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

23.6.10 END-USE: MARKET SIZE & FORECAST

23.6.11 REST OF LATIN AMERICA: MARKET SIZE & FORECAST

23.6.12 PRODUCT: MARKET SIZE & FORECAST

23.6.13 LIGHTING FIXTURES: MARKET SIZE & FORECAST

23.6.14 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

23.6.15 END-USE: MARKET SIZE & FORECAST

24 MIDDLE EAST & AFRICA

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- 24.1 PEST ANALYSIS
 - 24.1.1 POLITICAL
 - 24.1.2 ECONOMIC
 - 24.1.3 SOCIAL
 - 24.1.4 TECHNOLOGICAL
- 24.2 MARKET SIZE & FORECAST
- 24.3 PRODUCT
 - 24.3.1 MARKET SIZE & FORECAST
 - 24.3.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 24.3.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST
 - 24.3.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 24.3.5 LIGHTING SOURCE: MARKET SIZE & FORECAST
- 24.4 END-USE
- 24.5 APPLICATION
- 24.6 KEY COUNTRIES
 - 24.6.1 SAUDI ARABIA: MARKET SIZE & FORECAST
 - 24.6.2 PRODUCT: MARKET SIZE & FORECAST
 - 24.6.3 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 24.6.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 24.6.5 END-USE: MARKET SIZE & FORECAST
 - 24.6.6 UAE: MARKET SIZE & FORECAST
 - 24.6.7 PRODUCT: MARKET SIZE & FORECAST
 - 24.6.8 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 24.6.9 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 24.6.10 END-USE: MARKET SIZE & FORECAST
 - 24.6.11 SOUTH AFRICA: MARKET SIZE & FORECAST
 - 24.6.12 PRODUCT: MARKET SIZE & FORECAST
 - 24.6.13 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 24.6.14 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 24.6.15 END-USE: MARKET SIZE & FORECAST
 - 24.6.16 REST OF MIDDLE EAST & AFRICA: MARKET SIZE & FORECAST
 - 24.6.17 PRODUCT: MARKET SIZE & FORECAST
 - 24.6.18 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 24.6.19 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 24.6.20 END-USE: MARKET SIZE & FORECAST

25 COMPETITIVE LANDSCAPE

25.1 COMPETITION OVERVIEW

26 KEY COMPANY PROFILES

26.1 HARMAN INTERNATIONAL (SAMSUNG)

26.1.1 BUSINESS OVERVIEW

26.1.2 HARMAN INTERNATIONAL IN GLOBAL STAGE LIGHTING MARKET

26.1.3 PRODUCT OFFERINGS

26.1.4 KEY STRATEGIES

26.1.5 KEY STRENGTHS

26.1.6 KEY OPPORTUNITIES

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- 26.2 OSRAM
 - 26.2.1 BUSINESS OVERVIEW
 - 26.2.2 OSRAM IN GLOBAL STAGE LIGHTING MARKET
 - 26.2.3 PRODUCT OFFERINGS
 - 26.2.4 KEY STRATEGIES
 - 26.2.5 KEY STRENGTHS
 - 26.2.6 KEY OPPORTUNITIES
- 26.3 SIGNIFY HOLDING (PHILIPS)
 - 26.3.1 BUSINESS OVERVIEW
 - 26.3.2 SIGNIFY HOLDING IN GLOBAL STAGE LIGHTING MARKET
 - 26.3.3 PRODUCT OFFERINGS
 - 26.3.4 KEY STRATEGIES
 - 26.3.5 KEY STRENGTHS
 - 26.3.6 KEY OPPORTUNITIES
- 27 OTHER PROMINENT VENDORS
 - 27.1 ABSEN
 - 27.1.1 BUSINESS OVERVIEW
 - 27.1.2 KEY STRENGTHS
 - 27.1.3 KEY STRATEGIES
 - 27.2 ALTMAN LIGHTING
 - 27.2.1 BUSINESS OVERVIEW
 - 27.2.2 KEY STRENGTHS
 - 27.2.3 KEY STRATEGIES
 - 27.3 ANTARI LIGHTING ? EFFECTS
 - 27.3.1 BUSINESS OVERVIEW
 - 27.3.2 KEY STRENGTHS
 - 27.3.3 KEY STRATEGIES
 - 27.4 APOLLO DESIGN TECHNOLOGY
 - 27.4.1 BUSINESS OVERVIEW
 - 27.4.2 KEY STRENGTHS
 - 27.4.3 KEY STRATEGIES
 - 27.5 AYRTON
 - 27.5.1 BUSINESS OVERVIEW
 - 27.5.2 KEY STRENGTHS
 - 27.5.3 KEY STRATEGIES
 - 27.6 BLIZZARD LIGHTING
 - 27.6.1 BUSINESS OVERVIEW
 - 27.6.2 KEY STRENGTHS
 - 27.6.3 KEY STRATEGIES
 - 27.7 CHAUVET PROFESSIONAL
 - 27.7.1 BUSINESS OVERVIEW
 - 27.7.2 KEY STRENGTHS
 - 27.7.3 KEY STRATEGIES
 - 27.8 CHROMA-Q
 - 27.8.1 BUSINESS OVERVIEW
 - 27.8.2 KEY STRENGTHS

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27.8.3 KEY STRATEGIES
27.9 CITY THEATRICAL
27.9.1 BUSINESS OVERVIEW
27.9.2 KEY STRENGTHS
27.9.3 KEY STRATEGIES
27.10 CRAMDESIGNZ
27.10.1 BUSINESS OVERVIEW
27.10.2 KEY STRENGTHS
27.10.3 KEY STRATEGIES
27.11 DEXEL LIGHTING
27.11.1 BUSINESS OVERVIEW
27.11.2 KEY STRENGTHS
27.11.3 KEY STRATEGIES
27.12 EATON
27.12.1 BUSINESS OVERVIEW
27.12.2 KEY STRENGTHS
27.12.3 KEY STRATEGIES
27.13 ELEKTRALITE
27.13.1 BUSINESS OVERVIEW
27.13.2 KEY STRENGTHS
27.13.3 KEY STRATEGIES
27.14 ELATION PROFESSIONAL
27.14.1 BUSINESS OVERVIEW
27.14.2 KEY STRENGTHS
27.14.3 KEY STRATEGIES
27.15 ENTTEC
27.15.1 BUSINESS OVERVIEW
27.15.2 KEY STRENGTHS
27.15.3 KEY STRATEGIES
27.16 EPSILON ELECTRONICS
27.16.1 BUSINESS OVERVIEW
27.16.2 KEY STRENGTHS
27.16.3 KEY STRATEGIES
27.17 VISUAL ENVIRONMENT TECHNOLOGIES
27.17.1 BUSINESS OVERVIEW
27.17.2 KEY STRENGTHS
27.17.3 KEY STRATEGIES
27.18 (GLP)
27.18.1 BUSINESS OVERVIEW
27.18.2 KEY STRENGTHS
27.18.3 KEY STRATEGIES
27.19 GUANGZHOU HAoyang ELECTRONIC
27.19.1 BUSINESS OVERVIEW
27.19.2 KEY STRENGTHS
27.19.3 KEY STRATEGIES
27.20 KUMHO ELECTRIC
27.20.1 BUSINESS OVERVIEW

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27.20.2 KEY STRENGTHS
27.20.3 KEY STRATEGIES
27.21 LEPRECON
27.21.1 BUSINESS OVERVIEW
27.21.2 KEY STRENGTHS
27.21.3 KEY STRATEGIES
27.22 LITETRONICS
27.22.1 BUSINESS OVERVIEW
27.22.2 KEY STRENGTHS
27.22.3 KEY STRATEGIES
27.23 LYCIAN STAGE LIGHTING
27.23.1 BUSINESS OVERVIEW
27.23.2 KEY STRENGTHS
27.23.3 KEY STRATEGIES
27.24 MA LIGHTING INTERNATIONAL
27.24.1 BUSINESS OVERVIEW
27.24.2 KEY STRENGTHS
27.24.3 KEY STRATEGIES
27.25 MIGHTY BRIGHT
27.25.1 BUSINESS OVERVIEW
27.25.2 KEY STRENGTHS
27.25.3 KEY STRATEGIES
27.26 MICHIGAN LIGHTING SYSTEMS
27.26.1 BUSINESS OVERVIEW
27.26.2 KEY STRENGTHS
27.26.3 KEY STRATEGIES
27.27 NICOLAUDIE GROUP
27.27.1 BUSINESS OVERVIEW
27.27.2 KEY STRENGTHS
27.27.3 KEY STRATEGIES
27.28 ACUITY BRANDS
27.28.1 BUSINESS OVERVIEW
27.28.2 KEY STRENGTHS
27.28.3 KEY STRATEGIES
27.29 PROEL
27.29.1 BUSINESS OVERVIEW
27.29.2 KEY STRENGTHS
27.29.3 KEY STRATEGIES
27.30 RED LIGHTING
27.30.1 BUSINESS OVERVIEW
27.30.2 KEY STRENGTHS
27.30.3 KEY STRATEGIES
27.31 ROSCO LABORATORIES
27.31.1 BUSINESS OVERVIEW
27.31.2 KEY STRENGTHS
27.31.3 KEY STRATEGIES
27.32 SGM

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- 27.32.1 BUSINESS OVERVIEW
- 27.32.2 KEY STRENGTHS
- 27.32.3 KEY STRATEGIES
- 27.33 STUDIO DUE
- 27.33.1 BUSINESS OVERVIEW
- 27.33.2 KEY STRENGTHS
- 27.33.3 KEY STRATEGIES
- 27.34 TECHNI-LUX
- 27.34.1 BUSINESS OVERVIEW
- 27.34.2 KEY STRENGTHS
- 27.34.3 KEY STRATEGIES
- 27.35 TECLUMEN
- 27.35.1 BUSINESS OVERVIEW
- 27.35.2 KEY STRENGTHS
- 27.35.3 KEY STRATEGIES
- 27.36 ULTRA-TECH LIGHTING
- 27.36.1 BUSINESS OVERVIEW
- 27.36.2 KEY STRENGTHS
- 27.36.3 KEY STRATEGIES
- 27.37 USHIO LIGHTING
- 27.37.1 BUSINESS OVERVIEW
- 27.37.2 KEY STRENGTHS
- 27.37.3 KEY STRATEGIES
- 27.38 ZUMTOBEL
- 27.38.1 BUSINESS OVERVIEW
- 27.38.2 KEY STRENGTHS
- 27.38.3 KEY STRATEGIES
- 27.39 ROBERT JULIAT
- 27.39.1 BUSINESS OVERVIEW
- 27.39.2 KEY STRENGTHS
- 27.39.3 KEY STRATEGIES

- 28 REPORT SUMMARY
- 28.1 KEY TAKEAWAYS
- 28.2 STRATEGIC RECOMMENDATIONS

- 29 QUANTITATIVE SUMMARY
- 29.1 MARKET BY GEOGRAPHY
- 29.2 LIGHTING FIXTURES
- 29.2.1 PARS: MARKET BY GEOGRAPHY
- 29.2.2 STRIPLIGHTS & CYC LIGHTS: MARKET BY GEOGRAPHY
- 29.2.3 ELLIPSOIDALS: MARKET BY GEOGRAPHY
- 29.2.4 FRESNELS: MARKET BY GEOGRAPHY
- 29.2.5 FOLLOWSPOTS: MARKET BY GEOGRAPHY
- 29.2.6 BEAM PROJECTORS: MARKET BY GEOGRAPHY
- 29.2.7 SCOOPS: MARKET BY GEOGRAPHY
- 29.3 LIGHTING CONTROL SYSTEMS

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- 29.3.1 LIGHTING CONTROL SYSTEMS: MARKET BY GEOGRAPHY
- 29.4 FIXTURE MOVEMENT
 - 29.4.1 AUTOMATED/INTELLIGENT FIXTURES: MARKET BY GEOGRAPHY
 - 29.4.2 STATIC FIXTURES: MARKET BY GEOGRAPHY
- 29.5 LIGHT SOURCE
 - 29.5.1 CONVENTIONAL LIGHTING: MARKET BY GEOGRAPHY
 - 29.5.2 LED LIGHTING: MARKET BY GEOGRAPHY
- 29.6 PRODUCT
 - 29.6.1 CONTROLLERS: MARKET BY GEOGRAPHY
 - 29.6.2 VISUALIZERS: MARKET BY GEOGRAPHY
- 29.7 END-USE
 - 29.7.1 TOURING RENTAL: MARKET BY GEOGRAPHY
 - 29.7.2 FIXED INSTALLATION: MARKET BY GEOGRAPHY
- 29.8 APPLICATION
 - 29.8.1 CONCERTS: MARKET BY GEOGRAPHY
 - 29.8.2 CORPORATE EVENTS: MARKET BY GEOGRAPHY
 - 29.8.3 BROADCAST INDUSTRY: MARKET BY GEOGRAPHY
 - 29.8.4 WEDDINGS/EVENTS: MARKET BY GEOGRAPHY
 - 29.8.5 HOSPITALITY INDUSTRY: MARKET BY GEOGRAPHY
 - 29.8.6 ARCHITECTURAL & COMMERCIAL INSTALLS: MARKET BY GEOGRAPHY
 - 29.8.7 HOUSES OF WORSHIP: MARKET BY GEOGRAPHY
 - 29.8.8 DJ RETAIL/REC DJ: MARKET BY GEOGRAPHY
 - 29.8.9 THEATERS: MARKET BY GEOGRAPHY
 - 29.8.10 FITNESS/SPORTS: MARKET BY GEOGRAPHY
 - 29.8.11 NIGHTCLUBS: MARKET BY GEOGRAPHY
- 29.9 NORTH AMERICA
 - 29.9.1 PRODUCT: MARKET SIZE & FORECAST
 - 29.9.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 29.9.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST
 - 29.9.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 29.9.5 LIGHT SOURCE: MARKET SIZE & FORECAST
- 29.10 END-USE
- 29.11 APPLICATION
- 29.12 US
 - 29.12.1 PRODUCT: MARKET SIZE & FORECAST
 - 29.12.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 29.12.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 29.12.4 END-USE: MARKET SIZE & FORECAST
- 29.13 CANADA
 - 29.13.1 PRODUCT: MARKET SIZE & FORECAST
 - 29.13.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 29.13.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
 - 29.13.4 END-USE: MARKET SIZE & FORECAST
- 29.14 EUROPE
 - 29.14.1 PRODUCT: MARKET SIZE & FORECAST
 - 29.14.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
 - 29.14.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST

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29.14.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.14.5 LIGHT SOURCE: MARKET SIZE & FORECAST
29.15 END-USE
29.16 APPLICATION
29.17 UK
29.17.1 PRODUCT: MARKET SIZE & FORECAST
29.17.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.17.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.17.4 END-USE: MARKET SIZE & FORECAST
29.18 GERMANY
29.18.1 PRODUCT: MARKET SIZE & FORECAST
29.18.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.18.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.18.4 END-USE: MARKET SIZE & FORECAST
29.19 FRANCE
29.19.1 PRODUCT: MARKET SIZE & FORECAST
29.19.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.19.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.19.4 END-USE: MARKET SIZE & FORECAST
29.20 ITALY
29.20.1 PRODUCT: MARKET SIZE & FORECAST
29.20.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.20.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.20.4 END-USE: MARKET SIZE & FORECAST
29.21 SPAIN
29.21.1 PRODUCT: MARKET SIZE & FORECAST
29.21.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.21.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.21.4 END-USE: MARKET SIZE & FORECAST
29.22 NORDIC COUNTRIES
29.22.1 PRODUCT: MARKET SIZE & FORECAST
29.22.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.22.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.22.4 END-USE: MARKET SIZE & FORECAST
29.23 REST OF EUROPE
29.23.1 PRODUCT: MARKET SIZE & FORECAST
29.23.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.23.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.23.4 END-USE: MARKET SIZE & FORECAST
29.24 APAC
29.24.1 PRODUCT: MARKET SIZE & FORECAST
29.24.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.24.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST
29.24.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.24.5 LIGHT SOURCE: MARKET SIZE & FORECAST
29.25 END-USE
29.26 APPLICATION

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29.27 CHINA
29.27.1 PRODUCT: MARKET SIZE & FORECAST
29.27.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.27.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.27.4 END-USE: MARKET SIZE & FORECAST
29.28 JAPAN
29.28.1 PRODUCT: MARKET SIZE & FORECAST
29.28.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.28.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.28.4 END-USE: MARKET SIZE & FORECAST
29.29 AUSTRALIA
29.29.1 PRODUCT: MARKET SIZE & FORECAST
29.29.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.29.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.29.4 END-USE: MARKET SIZE & FORECAST
29.30 SOUTH KOREA
29.30.1 PRODUCT: MARKET SIZE & FORECAST
29.30.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.30.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.30.4 END-USE: MARKET SIZE & FORECAST
29.31 INDIA
29.31.1 PRODUCT: MARKET SIZE & FORECAST
29.31.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.31.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.31.4 END-USE: MARKET SIZE & FORECAST
29.32 REST OF APAC
29.32.1 PRODUCT: MARKET SIZE & FORECAST
29.32.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.32.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.32.4 END-USE: MARKET SIZE & FORECAST
29.33 LATIN AMERICA
29.33.1 PRODUCT: MARKET SIZE & FORECAST
29.33.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.33.3 LIGHTING FIXTURES BY FIXTURE MOVEMENT: MARKET SIZE & FORECAST
29.33.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.33.5 LIGHT SOURCE: MARKET SIZE & FORECAST
29.34 END-USE
29.35 APPLICATION
29.36 BRAZIL
29.36.1 PRODUCT: MARKET SIZE & FORECAST
29.36.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.36.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.36.4 END-USE: MARKET SIZE & FORECAST
29.37 MEXICO
29.37.1 PRODUCT: MARKET SIZE & FORECAST
29.37.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.37.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST

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29.37.4 END-USE: MARKET SIZE & FORECAST
29.38 REST OF LATIN AMERICA
29.38.1 PRODUCT: MARKET SIZE & FORECAST
29.38.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.38.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.38.4 END-USE: MARKET SIZE & FORECAST
29.39 MIDDLE EAST & AFRICA
29.39.1 PRODUCT: MARKET SIZE & FORECAST
29.39.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.39.3 FIXTURE MOVEMENT: MARKET SIZE & FORECAST
29.39.4 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.39.5 LIGHT SOURCE: MARKET SIZE & FORECAST
29.40 END-USE
29.41 APPLICATION
29.42 SAUDI ARABIA
29.42.1 PRODUCT: MARKET SIZE & FORECAST
29.42.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.42.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.42.4 END-USE: MARKET SIZE & FORECAST
29.43 UAE
29.43.1 PRODUCT: MARKET SIZE & FORECAST
29.43.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.43.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.43.4 END-USE: MARKET SIZE & FORECAST
29.44 SOUTH AFRICA
29.44.1 PRODUCT: MARKET SIZE & FORECAST
29.44.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.44.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.44.4 END-USE: MARKET SIZE & FORECAST
29.45 REST OF MIDDLE EAST & AFRICA
29.45.1 PRODUCT: MARKET SIZE & FORECAST
29.45.2 LIGHTING FIXTURES: MARKET SIZE & FORECAST
29.45.3 LIGHTING CONTROL SYSTEMS: MARKET SIZE & FORECAST
29.45.4 END-USE: MARKET SIZE & FORECAST

30 APPENDIX

30.1 ABBREVIATIONS

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