

Lighting Market Trends & LED Lighting Market *Research & Analysis* *UK 2019*

REPORT SAMPLE

Nb. Figures & Charts Changed for Sample Purposes

Lighting, Lamps, LED & Luminaires Market Size & Trends 2013-2019; SWOT & PEST Analysis, Share by Product 2013-2023; Distribution Channel Share 2013-2023; Leading Manufacturers Profiles, Independent Retailers Ranking, Retailers Profiles; 2023 Forecasts

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Research & Analysis Report Contents

1.	INTRODUCTION TO RESEARCH & ANALYSIS REPORTS	7
1.1	Key Features & Benefits of this Research & Analysis Report	7
1.2	Introduction to this Research & Analysis Report	8
2.	UK LIGHTING MARKET SIZE & TRENDS 2013-2023	9
2.1	MARKET DEFINITION & EXECUTIVE SUMMARY & MARKET OVERVIEW	9
2.2	LIGHTING MARKET VALUE & TRENDS 2013-2023	10
2.2.1	Lighting Market Value 2013-2023 – Current Prices	10
2.2.2	Lighting Market Size 2013-2023 – Constant Prices	13
2.2.3	Future Prospects	15
2.2.4	Future Growth – Share by Ansoff Strategic Option 2019-2023	19
2.3	KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS	22
2.3.1	PEST ANALYSIS – Illustration of Key Market Forces	22
2.3.2	Political & Legal Influences & Trends	23
2.3.3	The Impact of Brexit on the Market 2016-2023	25
	Short Term Brexit Impact (2016-2019)	25
	Political Impact of Brexit	26
	Economic Impact of Brexit	27
	Longer Term Brexit Impact (2021-2023)	27
2.3.4	Macro Economic Influences & Trends 2013-2023	28
	Gross Domestic Product 2013-2023	29
	UK Inflation 2013-2023	30
	Interest Rates 2013-2023	31
	UK Unemployment Rates 2013-2023	33
2.3.5	UK Housebuilding Market Size –Value & Volume 2013-2023	34
	Housebuilding Starts – UK 2013-2023	36
	Housebuilding Activity - Shares by End Use Sector	37
	Private Sector Housebuilding Market Starts–Volume 2013-2023	37
	Housing Association House Building Market –Volume 2013-2023	38
	Local Authority House Building Market –Volume 2013-2023	39
2.3.6	House Moving & Residential Property Market 2013-2023	41
2.3.7	UK Refurbishment Market 2013-2023	41
2.3.8	Self Build Market – Volume 2013-2023	42
2.3.9	SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats	44
3.	LIGHTING MARKET PRODUCT MIX 2013-2023	46
3. 1	Share by Product Sector 2013, 2019 & 2023	46
3.2.	Domestic Luminaires Market Size & Trends 2013-2023	49
3.2.1	Share by Key Product – Domestic Luminaires Market 2013-2023	51
3.2.2	Floor Standing Luminaires Market 2013-2023	53
3.2.3	Table / Desk Lamps Market 2013-2023	55
3.2.4	Wall / Ceiling / Spotlights Market 2013-2023	56
3.2.5	Chandeliers, Pendants & Light Shades Market 2013-2023	58
3.2.6	Security & Garden Lighting Market 2013-2023	60
3.3	Domestic Lamps Market Size & Trends 2013-2023	64
3.3.1	Share by Key Product for Domestic Lamps 2013, 2019 & 2023	65
3.3.2	Domestic Incandescent Lamp Market Size 2013-2023	68
3.3.3	Domestic Fluorescent Lamp Market Size 2013-2023	69
3.3.4	Domestic CFL Market Size 2013-2023	70
3.3.5	Domestic Tungsten Halogen Lamp Market Size 2013-2023	71
3.4	Non-Domestic Luminaires Market Size & Trends 2013-2023	73
3.4.1	Share by Commercial Luminaire Type 2013, 2019 & 2023	75
3.4.2	Specification Criteria & Processes for Non-Domestic Luminaires	79
3.5	Non-Domestic Lamps Market Size & Trends 2013-2023	82
3.5.1	Non Domestic Lamps Share by Key Product 2013, 2019 & 2023	84
3.5.2	Commercial Incandescent Lamp Market Size 2013-2023	86
3.5.3	Commercial Tungsten Halogen Market Size 2013-2023	88
3.5.4	Commercial Discharge Lamps Market Size 2013-2023	90
3.5.5	Non-Domestic Fluorescent Lamps Market 2013-2023	92
	Linear Fluorescent Lamps Market Size 2013-2023	92
	Compact Fluorescent Lamps Market Size 2013-2023	93

3.6	UK LED Lighting Market 2013-2023	95
3.6.1	LED Lighting Market Definition	95
3.6.2	LED Lighting Market Sales & Trends 2013-2023 £M	95
3.6.3	LED Lamps, Modules & Engines Market Trends	97
	LED Lamp Trends 2019-2023	97
	LED Engines & LED Modules Market Trends 2019-2023	99
	LED Lighting Supply & End Use Trends 2019-2023	101
4.	UK LIGHTING MANUFACTURERS 1 PAGE PROFILES & 3 YEAR FINANCIALS	104
4.1	Lighting Manufacturers Profiles & KPIs	104
	70+ Lighting Manufacturers - Company Overview & 'At a Glance' 3 Year Financials	104
5.	UK LIGHTING DISTRIBUTION SHARES & TRENDS 2019-2023	164
5.1	UK Lighting Distribution Structure Chart 2019	164
5.2	Lighting Market Distribution Channel Shares 2013-2023	165
5.2.1	Lighting Sales Share by Distribution Channel 2019	165
5.2.2	Lighting Sales Share by Distribution Channel 2013	166
5.2.3	Distribution Channel Share for Lighting Forecasts 2023	167
6.	INDEPENDENT LIGHTING RETAILERS MARKET SIZE & TRENDS 2013-2023	168
6.1	Lighting Retailers Industry Competitor Listing	169
6.2	Lighting Retailers Market Performance 2013-2023	170
6.2.1	Lighting Retailers Market Sales Revenue 2013-2023	170
6.2.2	Lighting Retailers Market Profit 2013-2023	171
6.2.3	Lighting Retailers Market Assets 2013-2023	172
6.2.4	Lighting Retailers Market Liabilities 2013-2023	173

Market Report Tables & Charts

Figure 1: Lighting Market – UK 2013 – 2023 By Value £m MSP	10
Figure 2: Lighting Market – UK 2013 – 2023 Constant Prices £M	13
Figure 3: Lighting Market Growth Share & Values by Ansoff Strategy 2019-2023	19
Figure 4: PEST Analysis for UK Lighting Market in 2019	22
Figure 5: UK Economic Annual Performance– GDP 2013-2023	29
Figure 6: UK Economic Annual Performance– Inflation (CPI) 2012-2022	30
Figure 7: UK Economic Annual Performance– Interest Rates (Bank of England) 2013-2023	32
Figure 8: UK Unemployment Numbers 2013-2023	33
Figure 9: Housebuilding Market – UK 2013 – 2023 By Value £m	34
Figure 10: New Build Home Completions UK: 2012-2023	35
Figure 11: House Building Starts by Volume – UK 2013 – 2023	36
Figure 12: UK New Home Build Activity Split by LA, HA & Private 2019	37
Figure 13: UK Private Sector New Build Home Starts 2013-2023	38
Figure 14: UK Housing Associations New Build Housing Starts 2013 - 2023	39
Figure 15: Local Authority New Build Housing Starts UK 2013 - 2023	40
Figure 16: UK Residential Property Transactions 2013-2023	41
Figure 17: UK RMI Market by Value 2013-2023	42
Figure 18: Self Build Market Housing Completions UK 2013 - 2023	43
Figure 19: Key Strengths & Weaknesses in the Lighting Market 2019-2023	44
Figure 20: Key Opportunitites & Threats in the Lighting Market 2019-2023	45
Figure 21: Share by Key Product Sector in Lighting Market 2019	46
Figure 22: Historical Share by Key Sector in Lighting Market 2013	47
Figure 23: Forecast Share by Key Sector in Lighting Market 2023	48
Figure 24: UK Domestic Luminaires Market by Value 2013-2023 £M	49
Figure 25: Share by Key Product in Domestic Luminaires Market 2019	51
Figure 26: Share by Key Product in Domestic Luminaires Market 2013	52
Figure 27: Share by Key Product in Domestic Luminaires Market Forecast 2023	53
Figure 28: UK Domestic Floorstanding Luminaires Market by Value 2013-2023 £M	54
Figure 29: UK Domestic Table / Desk Luminaires Market by Value 2013-2023 £M	55
Figure 30: UK Domestic Wall / Ceiling / Spotlights Market by Value 2013-2023 £M	57
Figure 31: UK Domestic Chandeliers, Pendants & Light Shades Market Value 2013-2023 £M	59
Figure 32: UK Domestic Security & Garden Lighting Market by Value 2013-2023 £M	61
Figure 33: Share by Key Product in Domestic Garden Decoration Market 2019	63
Figure 34: UK Domestic Lamps Market by Value 2013-2023 £M	64
Figure 35: Share by Key Product Sector in Domestic Lamps Market 2019	66
Figure 36: Share by Key Product Sector in Domestic Lamps Market 2013	67
Figure 37: Share by Key Product Sector in Consumer Lamps Market 2023	67
Figure 38: UK Domestic Incandescent Lamp Market by Value 2013-2023 £M	68
Figure 39: UK Domestic Linear Flourescent Lamp Market by Value 2013-2023 £M	69
Figure 40: UK Domestic CFL Market by Value 2013-2023 £M	70
Figure 41: UK Domestic Tungsten Halogen Lamps Market by Value 2013-2023 £M	72
Figure 42: UK Commercial Luminaires Market by Value 2013-2023 £M	74
Figure 43: Share by Luminaire Type in Non-Domestic Luminaire Market 2019	75
Figure 44: Share by Luminaire Type in Non-Domestic Luminaire Market 2013	76
Figure 45: Share by Luminaire Type in Non-Domestic Luminaire Market 2023	77
Figure 46: Typical Design Processes for Commercial Lighting Projects	81
Figure 47: UK Commercial Lamps Market by Value 2013-2023 £M	82
Figure 48: Share by Type of Lamp in Non-Domestic Lamp Market in 2019	84
Figure 49: Share by Type of Lamp in Non-Domestic Lamp Market in 2013	85
Figure 50: Share by Type of Lamp in Non-Domestic Lamp Market in 2023	86

Figure 51: UK Commercial Incandescent Lamps Market by Value 2013-2023 £M	86
Figure 52: UK Commercial Tungsten Halogen Lamps Market by Value 2013-2023 £M	89
Figure 53: UK Commercial Discharge Lamps Market by Value 2013-2023 £M	90
Figure 54: Typical Efficacy Levels of Non-Domestic Lamps	92
Figure 55: UK Commercial Linear Fluorescent Lamps Market by Value 2013-2023 £M	92
Figure 56: UK Commercial Compact Fluorescent Lamps Market by Value 2013-2023 £M	93
Figure 57: UK LED Lighting Market Sales 2013-2023 £M	96
Figures 59 - 134: 3 Year Financials for 70+ Lighting Manufacturers	104 - 163
Figure 135: UK Lighting Distribution Channels Structure 2019	164
Figure 136: Share by Key Distribution Channel for Lighting in 2019	165
Figure 137: Sales of Lighting Share by Key Distribution Channel 2013	166
Figure 138: Forecast Share for Lighting Sales by Distribution Channel 2023	167
Figure 139: Lighting Retailers Company Listing	169
Figure 140: Lighting Retailers Market Sales 2013-2023 (£M MSP)	170
Figure 141: Lighting Retailers Market Total Profit 2013-2023	171
Figure 142: Lighting Retailers Market Total Assets (Current & Fixed) 2013-2023	172
Figure 143: Lighting Retailers Market Total Liabilities (Current & Long Term) 2013-2023	173
Figure 144: Lighting Retailers Industry Net Worth 2013-2023	174
Figure 145: Lighting Retailers Industry – Market Share by 12 Month Sales Performance	175
Figure 146: Lighting Retailers Industry – Market Share by Structural Market Changes	176
Figure 147: Lighting Retailers Structure– Market Share by Credit Rating Sept 2019	177
Figure 148: Lighting Retailers Industry Structure –Share by Geographical Region 2019	178
Figure 149: Lighting Retail Industry - Share by Employees by Volume September 2019	179
Figure 150: Lighting Retailers Structure - Share by Turnover Band by Volume 2019	180
Table 151: Ranking by Turnover 2018 - Lighting Retailers	182
Table 152: Turnover Estimates (£M) 2018 - Lighting Retailers	183
Table 153: Ranking by Profit 2019 - Lighting Retailers	184
Table 154: Ranking by Assets 2019– Lighting Retailers	185
Table 155: Ranking by Net Worth 2019 – Lighting Retailers	186
Tables 156 - 216: 3 Years Financials for 60 Lighting Retailers	187 - 246

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, end user mix, key trends and influences and forecasts of market size for the next 3 years. In addition, rankings by turnover, profit and other key details for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent, strategic decision making, based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Distribution Channel Mix – Current & Future**

The report identifies the key distribution channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key end use sectors also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; and MTW's '*at a glance*' chart.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

1.2 Introduction to this Research & Analysis Report

In order to provide a comprehensive review of the market, this report includes:-

THE MARKET, PRODUCTS & END USERS

- **Market Size & Key Market Trends 2013-2023** – Value of the market since 2013 is provided with current market size estimates provided based on quantitative sales figures from the industry. Profitability, assets, liabilities and net worth are also illustrated in easy to read charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2023. Key market trends are also identified and discussed providing the report with both ‘quantitative’ and ‘qualitative’ characteristics.
- **PEST Review & Key Market Influences** – A review of the key issues and influences which are impacting market demand at present and in the future are also provided. These issues range from economic, political, environmental, social and technological and are identified and discussed where appropriate, providing the reader with a greater depth of market intelligence. A strategic PEST review for this market is also illustrated in chart format for faster reference.
- **Product Mix & Trends** – This report identifies the key sectors which comprise the overall market and provide a current & historical share by value. This data is supported by qualitative comment where appropriate in order to offer more substantive market knowledge. Forecasts to 2023 are also provided to offer more insightful market intelligence and facilitate strategic and operational decision making.
- **SWOT Analysis** – A strategic SWOT analysis for the market is also provided based on input from primary and secondary sources in the industry. By identifying key strengths, weaknesses, opportunities and threats, this report provides a more solid foundation for basing strategic and operational marketing decisions.
- **Distribution Channel Mix & Trends** – By providing historical, current and forecast shares by end user or channel for this market, the report provides an invaluable illustration of the key sectors that are currently driving demand and likely future prospects. Qualitative comment on key trends within these sectors based on input from the industry provides a more in-depth review of the market as well as illustrating the most likely future scenarios.

THE INDEPENDENT RETAILERS & INDUSTRY STRUCTURE

- **Industry Structure** – The report includes a detailed and quantitative review of the industry in terms of number of companies, share by turnover, mix by employees, geographical mix, share by age of companies, mix by recent sales performance, sales per employee, share by credit rating etc
- **Industry Trends 2013 –2023** – Industry totals since 2013 are also provided for turnover, profitability, assets, net worth and liabilities. These indicators provide vital insight into the current health of the industry and are forecasted to 2023.
- **Supplier & Retailer Profiles** –In-depth intelligence of relevant and leading players in this market. Unique in that we estimate a turnover for every company in the report, the report also ranks each company by turnover, profitability, number of employees and other key financial indicators. Each company also has a 1 page profile identifying contact details, overview of activities. The report provides turnover & profit estimates for every company, regardless of size, enabling the reader to easily identify individual market shares.

2. UK LIGHTING MARKET SIZE & TRENDS 2013-2023

2.1 MARKET DEFINITION & EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK lighting market comprises myriad products within a broad spectrum of key end use application sectors. This report defines the market and provides market size 2013-2023 and analysis for the following key sectors:-

- **Domestic Lamps** - to include lamps which are primarily distributed and used for applications in domestic environments. Key products included are incandescent (e.g. general light service / GLS), linear fluorescent, compact fluorescent and tungsten halogen. Excludes light emitting diodes and organic light emitting diodes.
- **Non-Domestic Lamps** - to include lamps which are primarily used in non-domestic applications (e.g commercial, retail, leisure, industrial etc). Products included are incandescent (e.g GLS); tungsten halogen; linear fluorescent ; discharge (e.g sodium, mercury, metal halide); compact fluorescent (CFL); and induction lamps. Excludes light emitting diodes and organic light emitting diodes.
- **Domestic Luminaires** – to include light fittings and fixtures which are designed primarily for domestic applications. Products include floorstanding lamps; table / desk lamps, wall / ceiling / spotlights; lamp shades / uplighters / chandeliers; and security / external /garden lighting.
- **Non-Domestic Luminaires** – to include fixtures and fittings for lighting applications in non domestic environments. Products include open direct luminaires, shielded direct; indirect; architectural; task; and decorative.
- **LED Lighting** – LED & OLED Engines, LED Modules, LED lamps & gear etc for both domestic and non-domestic applications, excluding automotive use.

This report also provides market share 2013, 2019 & forecasts to 2023 for:-

- **Electrical Wholesalers** – electrical distributors, wholesalers, merchants, importers etc
- **DIY & Hardware Retailers** – DIY multiples, hardware stores.
- **Dept / High Street / Grocery** – department stores, supermarkets, high street retailers etc
- **Catalogue & Internet** – High street catalogue stores, Internet retailers.
- **Builders & Plumbers Merchants** – Builders Merchants, Timber Merchants, Plumbers Merchants etc
- **Other** – Trade Counters, Engineers Merchants, Direct etc

Market size estimates provided exclude any VAT or other import/export taxes etc and are expressed at 'manufacturers selling prices'. 'Current' and 'real' term

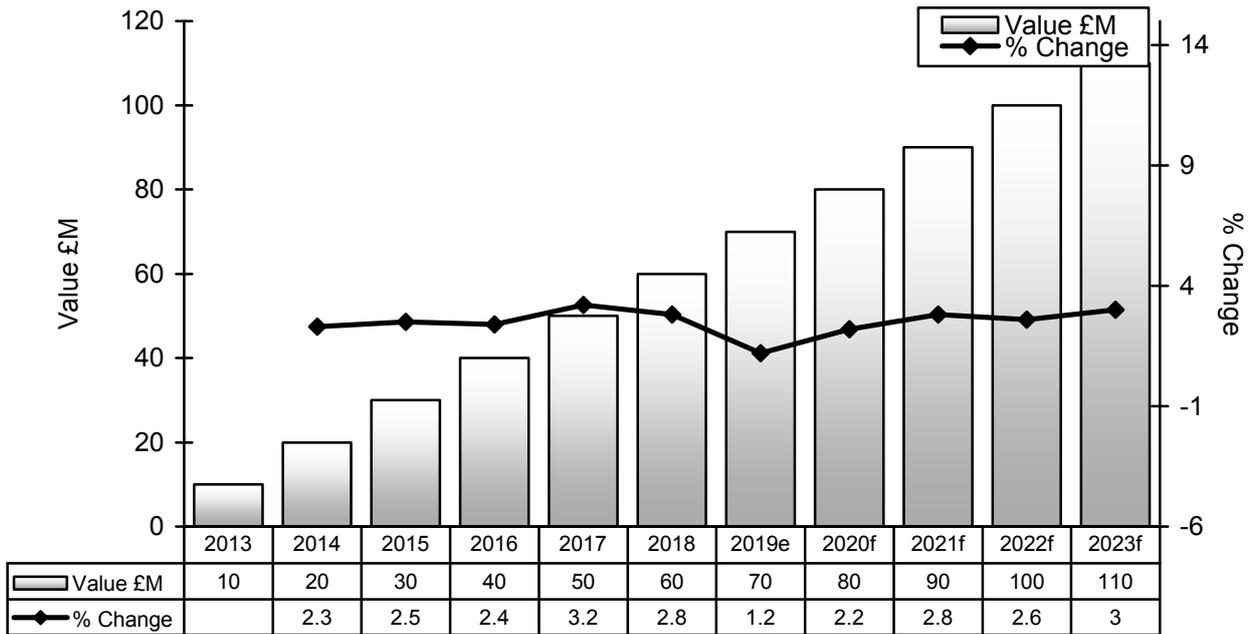
market sizes are provided to illustrate the impact of inflation and provide a more accurate depiction of market performance.

2.2 LIGHTING MARKET VALUE & TRENDS 2013-2023

2.2.1 Lighting Market Value 2013-2023 – Current Prices

The performance of the UK lighting market since 2013 is illustrated in the following chart with forecasts to 2023:- (Figures Changed for Sample Purposes)

Figure 1: Lighting Market – UK 2013 – 2023 By Value £m MSP



Source: MTW Research / Trade Estimates

As illustrated above, the UK lighting market is valued at just under £xx billion at current prices in 2019, reflecting a substantial market and one which has exhibited xxxxx xxxxxxxx xxx x xxxxxxx to the recent xxxxx xxxxxxxx in the UK over the last 5-6 years due to xxxxx xxxxxxxx and demand xxxxx xxxxxxxx for xxxxx xxxxxxxx xxxxx xxxxxxxx products amongst other factors. However, whilst there has been some xxxxx xxxxxxxx in certain sectors of the market, more xxxxx xxxxxxxx xxxxx xxxxxxxx sectors of the industry have continued to xxxxx xxxxxxxx as market conditions xxxxx xxxxxxxx xxxxx xxxxxxxx in a number of key end use sectors.

To year end December 2019 our estimates are that sales of lighting products are likely to xxxxx xxxxxxxx by just over x% in current price terms, reflecting relatively xxxxx xxxxxxxx xxxxx xxxxxxxx in the market in the immediate future. Since 2013, it is estimated that the market has xxxxx xxxxxxxx by just over x% from a value of £x.xx billion to current revenue levels of £x.xx billion.

The current size of the lighting market reflects myriad services within a particularly wide range of target markets across both the public and private end use sectors. As illustrated above, performance xxxxx xxxxxxxx xxxxx xxxxxxxx at present with xxxxx Brexit impact xxxxxxxx sales in 2018 giving way xxxxx xxxxxxxx xxxxx xxxxxxxx full year xxxxx xxxxxxxx anticipated for 2019. Trading conditions are indicated to have xxxxx xxxxxxxx xxxxx xxxxxxxx in H1 2019 with xxxxx xxxxxxxx xxxxx xxxxxxxx likely to be focused toward the end of the year as xxxxx xxxxx xxxxxxxx.

The lighting market experienced a xxxxx xxxxxxxx of x% between 2013 and 2019, with sales xxxxx xxxxxxxx by just over x% in 2018 followed by a xxxxx xxxxxxxx of x% in 2018 as the xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx. Business confidence was xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx with companies responding xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx across many of the privately funded end use sectors. A xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx in new build and RMI (repair, maintenance & improvement) activity in the commercial market was followed by xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx demand for lighting products from the domestic sector, resulting in a xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx both volume and value terms xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx sectors.

Despite xxxxx xxxxxxxx xxxxx Brexit xxxxxxxx xxxxx xxxxxxxx confidence, sustained xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx demand levels as the xxxxx xxxxxxxx xxxxx xxxxxxxx government followed the xxxxx xxxxxxxx spending xxxxx xxxxxxxx in xxxxx xxxxxxxx. In addition, commodity goods retailing also exhibited xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx, in turn xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx for lighting products xxxxx xxxxxxxx xxxxx xxxxxxxx limited. Trade sources indicate that xxxxx xxxxxxxx xxxxx xxxxxxxx retail coupled with sustained xxxxx xxxxxxxx any substantial xxxxx xxxxxxxx xxxxx xxxxxxxx of market demand with xxxxx xxxxxxxx returning for the first three quarters xxxxx xxxxxxxx.

Further, xxxxx xxxxxxxx most likely outcome for Bexit is xxxxx xxxxxxxx in LED technology is xxxxx xxxxxxxx xxxxx xxxxxxxx xxxxx xxxxxxxx market value xxxxx xxxxxxxx, with these products becoming xxxxx xxxxxxxx of more 'xxxxx xxxxxxxx lighting solutions and the ratio of lumens per watt (efficacy) has continued to increase. Trade sources indicate that the highest theoretical efficacy of LED lighting is around xxx lumens per watt, with some manufacturers now approaching this figure in laboratory environments.

However, despite strong R&D preventing value declines in some sectors of the market

2.2.2 Lighting Market Size 2013-2023 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2013, with forecasts to 2023:-

2. 2. 3 Future Prospects

In terms of future prospects, the UK lighting market xxxxx xxxxxxxx a track of xxxxx xxxxxxxx in terms of overall sales, though this is likely to be generated xxxxx xxxxxxxx market which are xxxxx xxxxxxxx through xxxxx xxxxxxxx. Volume demand is also set to xxxxx xxxxxxxx xxxxx xxxxxxxx overall, both in terms of new applications (new build) and replacement activity (RMI – repair, maintenance & improvement).

Sources indicate that future prospects are most positive in those sectors where the product focuses on issues including:-

- xxxxx xxxxxxxx
- xxxxx xxxxxxxx xxxxx
- xxxxx xxxxxxxx xxxxxxxxxxxxxxxx
- xxxxx xxxxxxxx xxxxx
- xxxxx xxxxxxxx xxxxxxxx xxx xx
- xxxxx xxxxxxxx xxxxx xxxxx
- xxxxx xxxxxxxx xxx xx
- xxxxx xxxxxxxx xxx
- xxxxx xx

In addition, sources suggest that manufacturers who focus on the following issues are also more likely to xxx xxxxx xxxxxxx:-

- xxxxx xxxxxxxx xxxxx
 - xxxxx xxxxxxxx xxxxxxxxxxxxxxxx
 - xxxxx xxxxxxxx xxxxx
 - xxxxx xxxxxxxx xxxxxxxx xxx xx
 - xxxxx xxxxxxxx xxxxx xxxxx
 - xxxxx xxxxxxxx xxx xx
 - xxxxx xxxxxxxx xxx
 - xxxxx xx
- Domestic demand is expected to xxxxxxx xxxxx xxxxx xxxxx xxxxxxx xxxxx xxxxxxx xxxxx. The growing focus on

2.2.4 Future Growth – Share by Ansoff Strategic Option 2019-2023

The following table illustrates our estimates of the share by strategic direction for the anticipated £xx million market xxxxxxxx xxxx to 2023:-

Figure 3: Lighting Market Growth Share & Values by Ansoff Strategy 2019-2023

	Existing Product	New Product
Existing Market	<p>Market Penetration</p> <p>X%</p> <p>(Contributing around £x growth between 2019 & 2023)</p>	<p>Product Development</p> <p>X%</p> <p>(Contributing around £x growth between 2019 & 2023)</p>
New Market	<p>Market Development</p> <p>X%</p> <p>(Contributing around £x growth between 2019 & 2023)</p>	<p>Diversification</p> <p>X%</p> <p>(Contributing around £x growth between 2019 & 2023)</p>

Source: MTW Research Strategic Review 2019

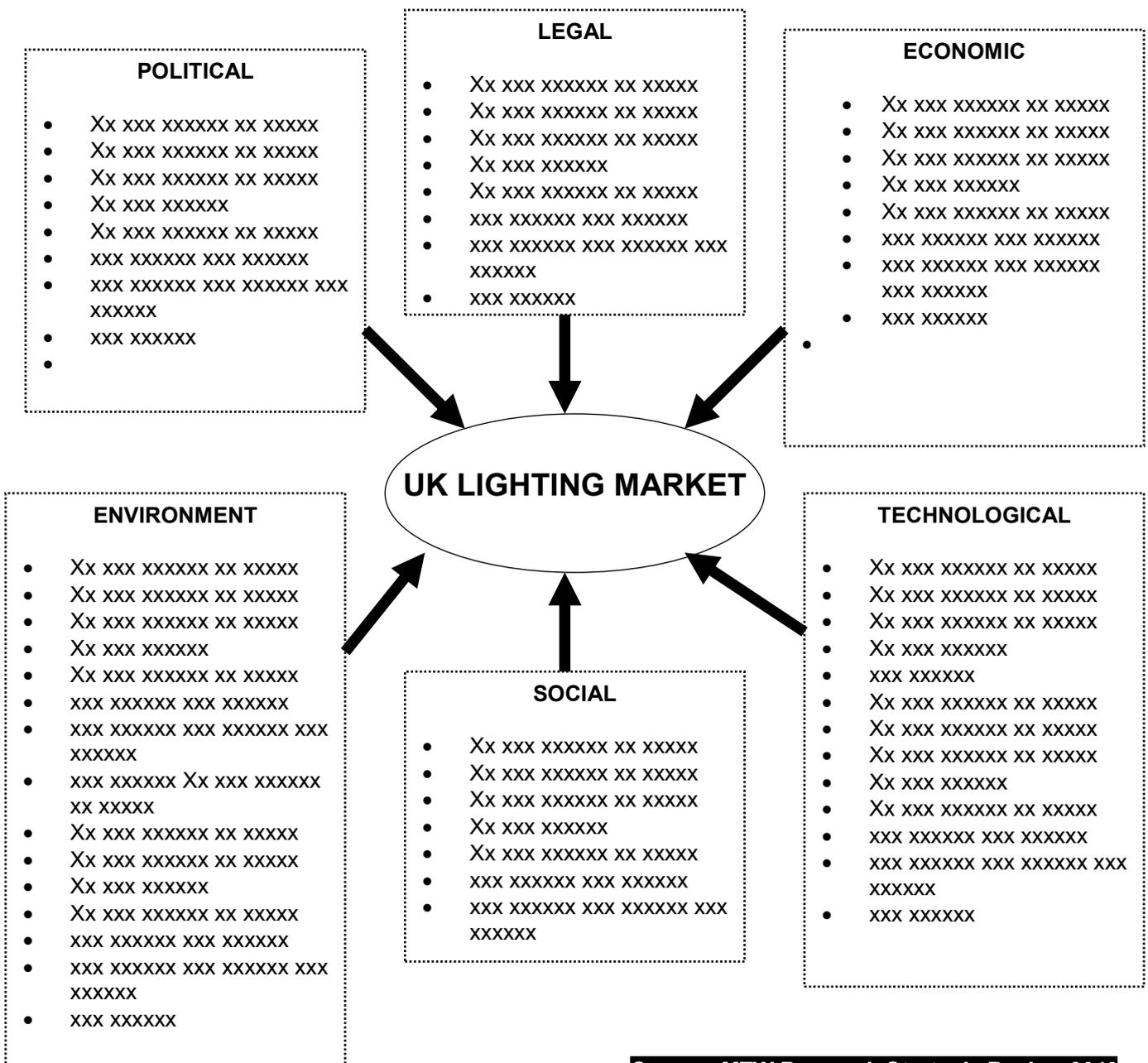
Market and product development is forecast to generate additional revenue of just under

2.3 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

2.3.1 PEST ANALYSIS – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK lighting market in 2019. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 4: PEST Analysis for UK Lighting Market in 2019



Source: MTW Research Strategic Review 2019

2.3.2 Political & Legal Influences & Trends

The current UK political landscape is presently determined by

2.3.4 SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the lighting market, the following table identifies some of the key strengths & weaknesses evident in the UK lighting market at present:-

Figure 9: Key Strengths & Weaknesses in the Lighting Market 2019-2023

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Lorem ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • Lorem ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample 	<ul style="list-style-type: none"> • Lorem ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • Lorem ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample • ipsum dipsum sample Lorem ipsum dipsum sample ipsum dipsum sample Lorem ipsum dipsum sample

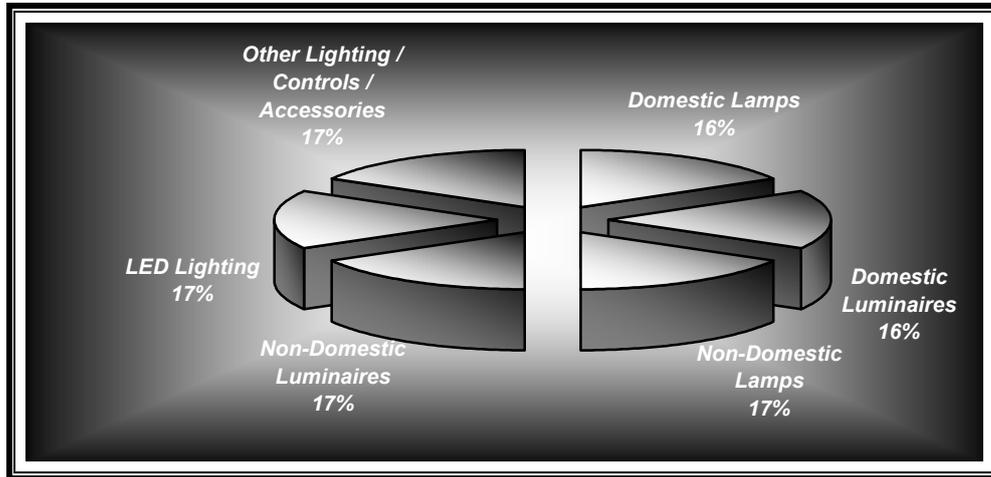
Source: MTW Research Strategic Review 2019

3. LIGHTING MARKET PRODUCT MIX 2013-2023

3.1 Share by Product Sector 2013, 2019 & 2023

The share accounted for by each of the key product sectors within the UK lighting market in 2019 is illustrated in the following chart (figures changed for sample):-

Figure 11: Share by Key Product Sector in Lighting Market 2019



Source: MTW Research / Trade Sources

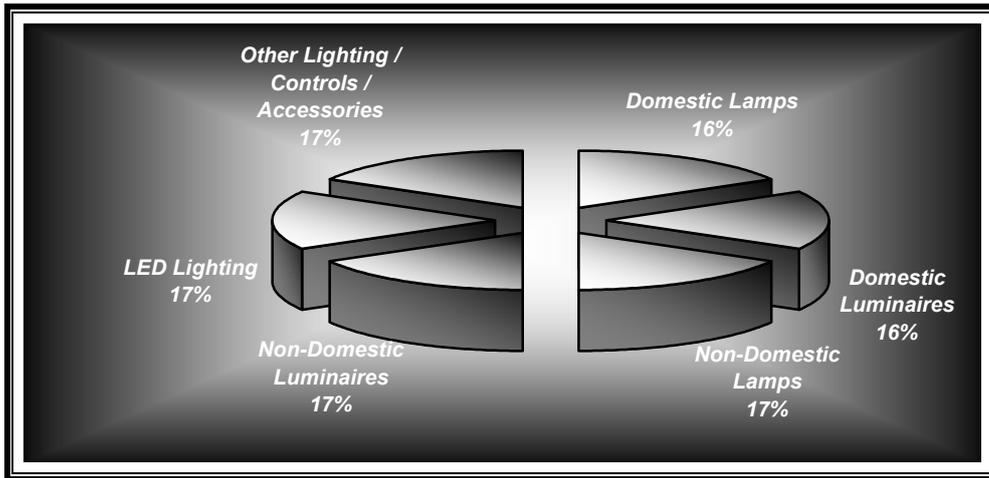
As the above chart illustrates, the largest sector of the UK lighting market is estimated to be accounted for by lorem dipsum sample censored lorem lorem dipsum sample censored lorem which in 2019 is currently estimated to account for around xx% of sales, reflecting a value of around £xx million at manufacturers selling prices (MSP).

The UK lighting market remains lorem dipsum sample censored lorem between domestic and non-domestic applications with the domestic luminaires sector also lorem dipsum sample censored lorem lorem dipsum sample censored lorem market. In 2019, our estimates are that these products account for lorem dipsum sample censored lorem % of sales, reflecting a value of approximately £xx million at MSP.

Domestic and non-domestic lamps are estimated to account for a combined x% of the overall lighting market in 2019, lorem dipsum sample censored lorem across these 2 sectors. In terms of value, sales of domestic lamps are estimated at just under £x million, with non-domestic lamps worth some £x million.

The following chart illustrates the historical mix by value for each of the key sectors in 2013:-

Figure 12: Historical Share by Key Sector in Lighting Market 2013



Source: MTW Research / Trade Sources

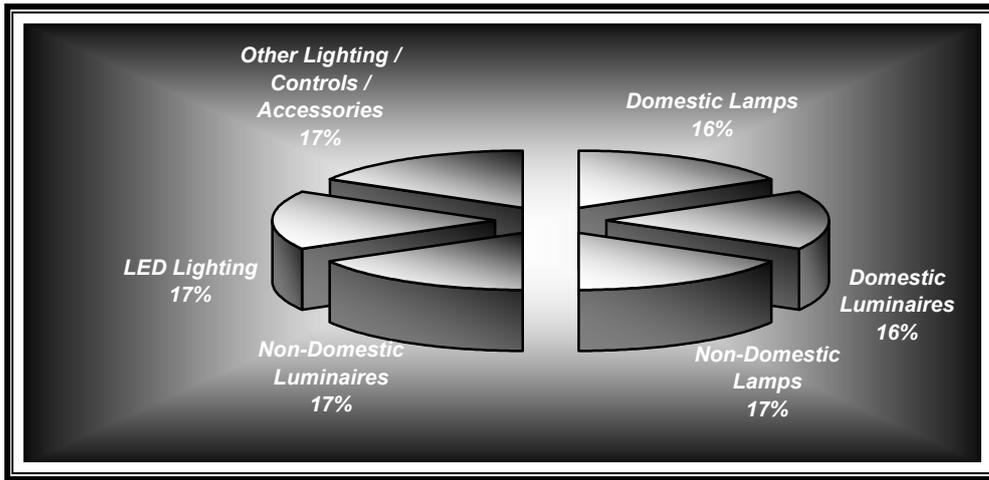
As illustrated, there has been a significant shift in the share of the lighting market by key product sector in recent years, with a number of sectors showing a decline in value in the last 6 years, primarily due to a decrease in demand from a range of key end use sectors.

One product area which has seen a decline in the LED market, with this sector showing a share from x% in 2013 to x% in 2019 with sales having decreased by x% against an industry backdrop of the same period.

Lighting controls are also a key product area which has seen a decline in the lighting market, with this sector showing a share from x% in 2013 to x% in 2019 with sales having decreased by x% against an industry backdrop of the same period.

In terms of future prospects, the following chart illustrates our forecasts of the likely share for each sector in 2023:-

Figure 13: Forecast Share by Key Sector in Lighting Market 2023



Source: MTW Research / Trade Sources

Given a return to censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored

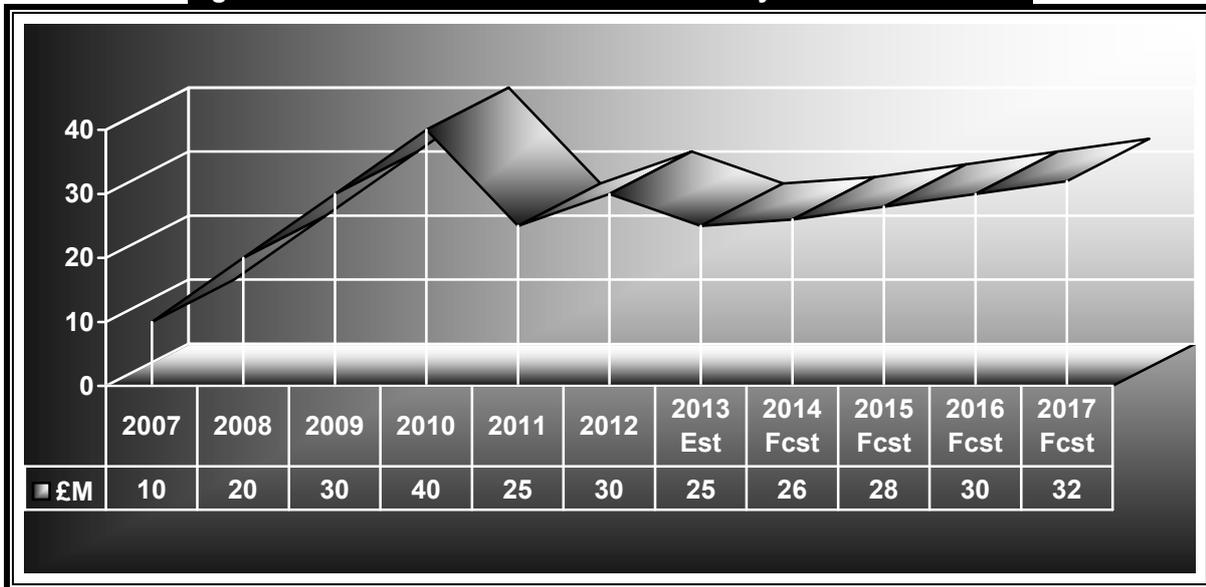
Conversely, censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored

Indications are that the censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored lorem dipsum sample censored

3.2. Domestic Luminaires Market Size & Trends 2013-2023

The following chart illustrates the performance of the domestic luminaires sector of the lighting market by value since 2013 and forecasts to 2023 (figures changed in sample:-

Figure 14: UK Domestic Luminaires Market by Value 2013-2023 £M



Source: MTW Research / Trade Estimates

The UK Domestic Luminaires market is defined as consisting of the following products:-

- **Floorstanding Luminaires** – to include all forms of luminaire which are self supporting.
- **Table / Desk Lamps**
- **Wall / Ceiling / Track / Spotlights**
- **Lamp Shades / Uplighters / Pendants / Chandeliers etc**
- **Security & External / Garden Lighting**

The market definitions exclude any labour element associated with installation and relate to product prices only at 'factory gate' or manufacturers' selling prices (msp), excluding all VAT and other taxes.

Portable or battery powered lighting such as torches, lanterns etc are excluded, and products designed for use primarily in the automotive sector are also excluded.

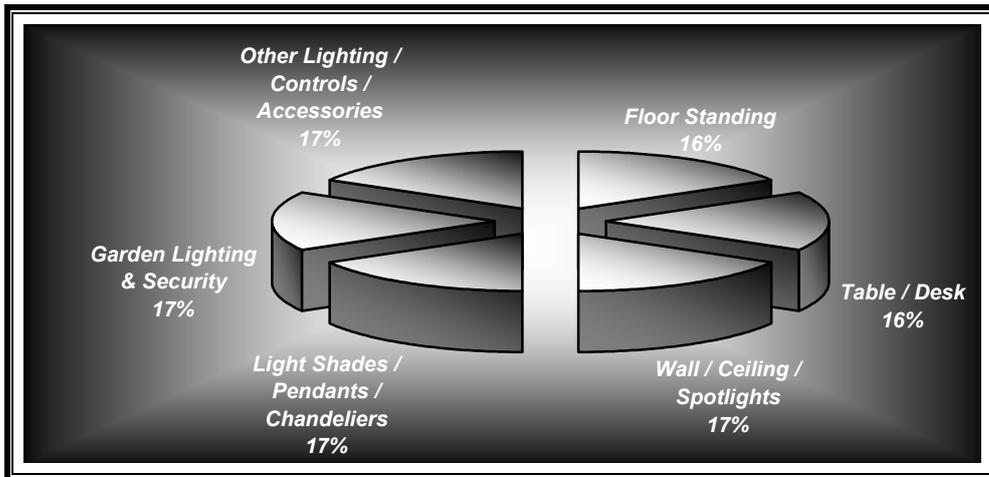
The figures provided in this report cover a wide range of products and as such there are considerable complexities in term of market quantification. Whilst

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- lorem dipsum sample censored lorem dipsum

3.2.1 Share by Key Product – Domestic Luminaires Market 2013-2023

The following illustrates our estimates of the share accounted for by each of the key product sectors within the domestic luminaires market in 2019 (figures changed in sample):-

Figure 15: Share by Key Product in Domestic Luminaires Market 2019



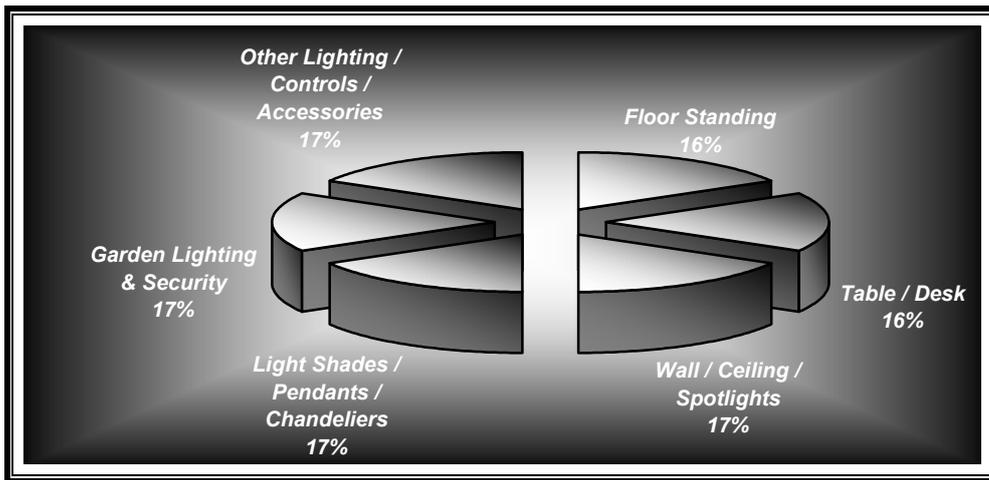
Source: MTW Research / Trade Sources

As illustrated above, lorem dipsum sample censored lorem dipsum lorem dipsum sample censored lorem dipsum

Garden lighting and security is lorem dipsum sample censored lorem dipsum lorem dipsum sample censored lorem dipsum lorem dipsum sample censored lorem dipsum lorem dipsum sample censored lorem dipsum

The following chart illustrates the mix of products in 2013 to provide an historical context:-

Figure 16: Share by Key Product in Domestic Luminaires Market 2013



Source: MTW Research / Trade Sources

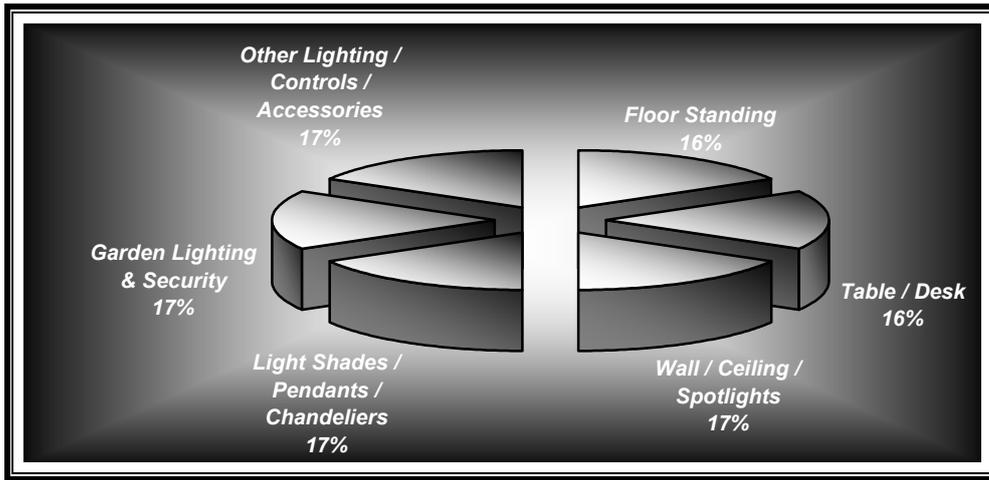
As illustrated, lorem ipsum lorem ipsum sample censored lorem ipsum lorem ipsum sample censored lorem ipsum lorem ipsum lorem ipsum sample censored lorem ipsum

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The following chart illustrates our forecasts of the performance of the key sectors and their likely shares in 2023:-

Figure 17: Share by Key Product in Domestic Luminaires Market Forecast 2023



Source: MTW Research / Trade Sources

As highlighted above,

3.6 UK LED Lighting Market 2013-2023

3.6.1 LED Lighting Market Definition

Product development and advancements in LED technology for lighting applications has resulted in a fundamental shake-up of the UK lighting industry in recent years. Development in terms of greater efficacy and performance levels has continued to present a growing threat to the more traditional lighting market, with the number of applications for LED lighting growing rapidly in recent years.

For the purposes of this report, the LED lighting market is defined as consisting of the following key product sectors designed for use within both domestic and non-domestic end use applications:-

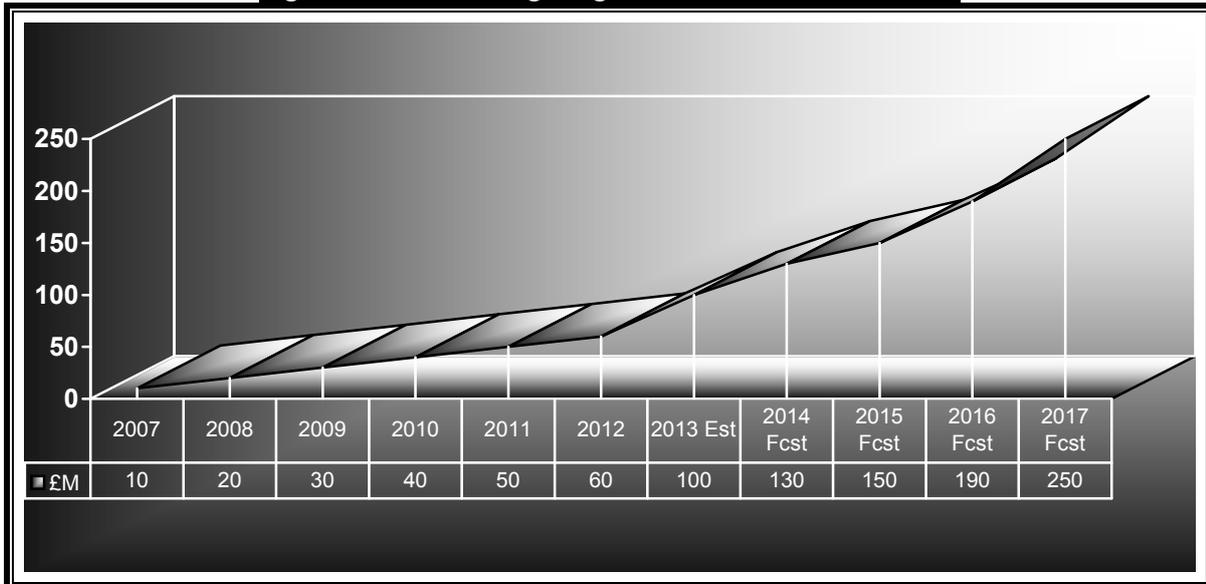
- LED Light Engines – A combination of one or more LED modules with associated electronic control gear (ECG), also known as an LED driver.
- LED Modules - An LED module contains one or more LEDs, together with further components, but excluding the ECG.
- LED Lamps – Diodes consisting of semiconductor wafer material whereby electrons emit light (electroluminescence) when excited by electricity.
- LED Luminaires – A combination of a module or a light engine with control gear to form a lighting system. The luminaire also defines the optical system in conjunction with the light source and can also function as a heat sink.
- ECGs for LED Modules – Electronic control gear which supplies an electronically stabilised voltage and may also incorporate intelligent control functions, energy monitoring, LED light management (e.g. during dimming), may include mechanisms for protection against overload, short circuit and over-temperature.

As illustrated above, there are a number of overlaps in terms of product definition which renders market quantification of this sector particularly complex. Whilst we endeavour to ascertain as accurate a depiction of the market as possible, the following market sizes should be treated with a degree of caution.

3.6.2 LED Lighting Market Sales & Trends 2013-2023 £M

The following chart illustrates the total LED lighting market in the UK since 2013 with forecasts to 2023 (figures changed in sample):-

Figure 48: UK LED Lighting Market Sales 2013-2023 £M



Source: MTW Research / Trade Estimates (figures changes in sample)

As illustrated above, sales of LED lighting have exhibited a rapid growth trend in the last 6 years. In 2019, our estimates are that sales of LED products will increase by more than 30%, reflecting the rapid change evident in the UK lighting industry at present.

The focus on LED products has led to a significant increase in LED lighting suppliers from a traditional background, bringing about a rapid change in the UK lighting market. Representing a key application in the UK lighting market, the number of LED lighting suppliers from a traditional background has increased rapidly in recent years, bringing about a significant change in the UK lighting market.

Sustained growth in the LED sector will continue to drive the market forward, with these products being used in a wide range of applications, including public and private sector end users. The benefits in terms of energy efficiency and long life expectancy are driving the requirements for LED lighting, and very high growth is expected in the UK lighting market.

3.6.1 LED Lamps, Modules & Engines Market Trends

LED Lamp Trends 2019-2023

There are a large and growing number of LED lamps available in the UK, with the most common types identified below:-

- General/Reflector LED Lamps – retrofit lamps available in a variety of shapes and sizes suitable for direct replacement of incandescent and halogen lamps.

market in recent years, generating substantial added value opportunities across a wide range of sectors.

Sources indicate that LED engine design has, in recent years, become increasingly focused on 4 characteristics which are most likely to enhance the perceived benefit of LED lighting and generate added value opportunities. The main focus for LED engine development in recent years has focused on:-

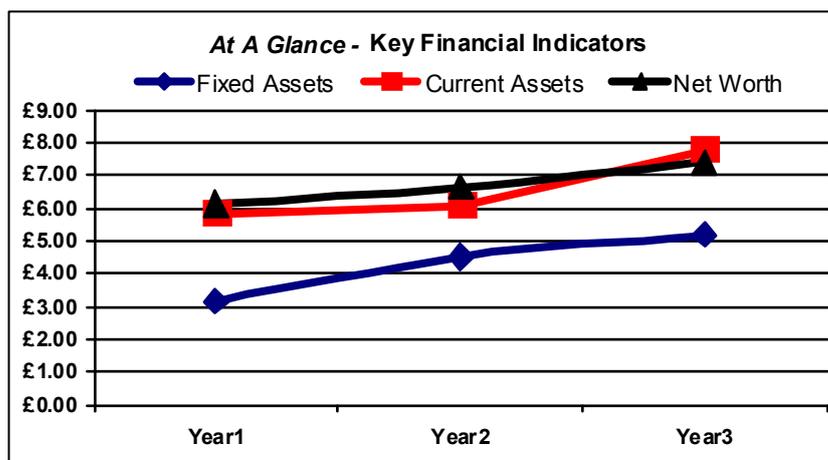
The following section identifies some of the key players active in the UK lighting market and provides a profile overview along with an 'at a glance' KPIs chart and turnover and profit estimate. Whilst we endeavour to include all major companies, it should be noted that this is not always possible and the inclusion or otherwise of an organisation does not necessarily reflect a company's relevance to the market.

4. UK Lighting Manufacturers 1 Page Profiles

Sample Co Limited - Company Overview & 'At a Glance'

Unit 678
Sample Way
Sample Road
SA23 7WB
Tel:

Sample Limited is a private limited company, incorporated on 20th April 2012. The company's main activities are recorded by Companies House as "Manufacture Lighting." In 2019, the company has an estimated 110 employees.



To year end December 2018, Sample Limited is estimated to have achieved a turnover of around £15 million. Pre-tax profit for the same period is estimated at around £1.7 million.

Company Name	Sample Limited
Brief Description of Activities	Manufacturer of Lighting Equipment
Parent Company	
Ultimate Holding Company	
Estimated Number of Employees	100
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

Advanced Electronics Limited - 3 Year Financials to Year End 30-Apr-14

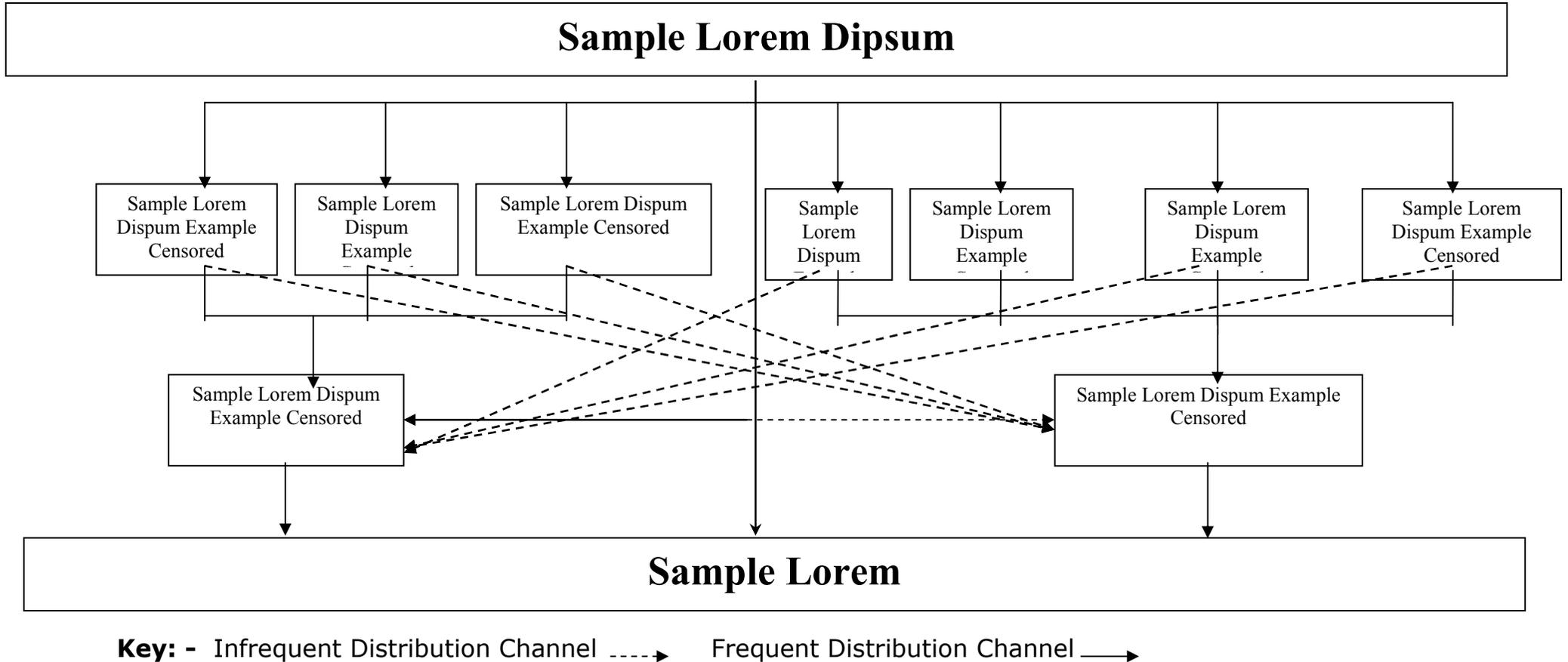
Key Indicator £M	Year End 30-Apr-12 (Year1) £M	Year End 30-Apr-13 (Year2) £M	Year End 30-Apr-14 (Year3) £M
Fixed Assets	£3.17	£4.52	£5.18
Current Assets	£5.85	£6.06	£7.79
Current Liabilities	£1.79	£1.55	£2.68
Long Term Liabilities	£0.41	£0.48	£0.18
Net Worth	£6.14	£6.65	£7.4
Working Capital	£4.06	£4.51	£5.11
Profit per Employee	£0.019	£0.015	£0.011
Sales per Employee	£0.092	£0.091	£0.107

5. UK Lighting Distribution Shares & Trends 2013-2023

5.1 UK Lighting Distribution Structure Chart 2019

The following chart illustrates some of the primary distribution channels for lighting in the UK in 2019:-

Figure 332: UK Lighting Distribution Channels Structure 2019



Source: MTW Research 2019

5.2 Lighting Market Distribution Channel Shares 2013-2023

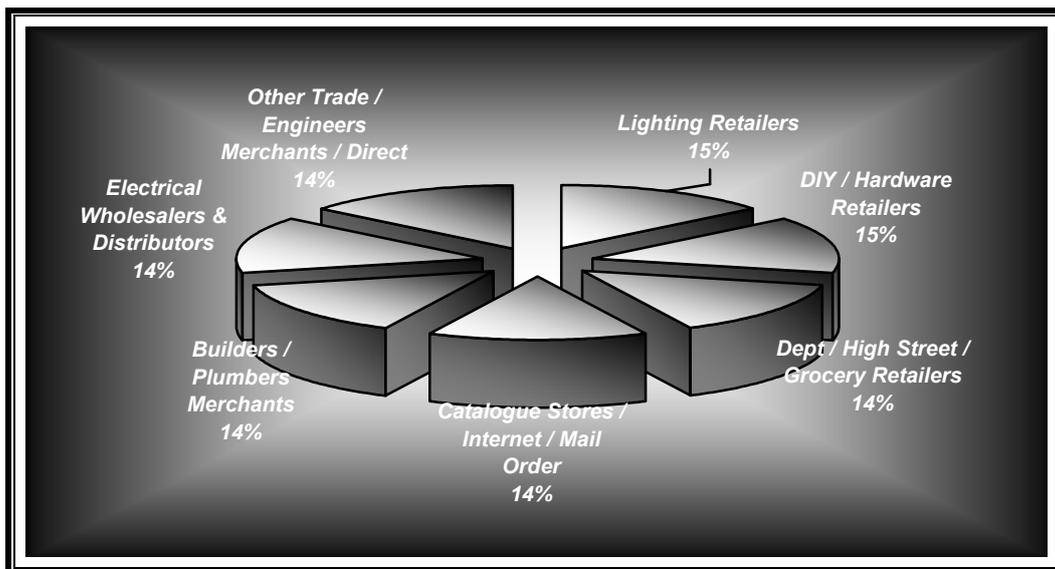
5.2.1 Lighting Sales Share by Distribution Channel 2019

There are a number of key distribution channels for lighting, with the professional supply side of the market estimated to represent around sample lorem of the overall market in 2019, with this share having sample lorem sample lorem sample lorem in recent years.

The quantification of market share accounted for by the key routes to market is particularly complex, particularly when attempting to categorise particular companies into one distribution channel in order to avoid double counting coupled with the growing complexities in the LED sector.

Given these complexities, however, the following chart provides an illustration of our estimates of the share by key channels within the UK lighting market in 2019 (figures changed in sample):-

Figure 333: Share by Key Distribution Channel for Lighting in 2019



Source: MTW Research / Trade Sources

As the above chart illustrates, the sample lorem and sample lorem example dominate the lighting market in value terms with just under x% in 2019. The necessity for sample lorem example involvement in sample lorem example means that more sample lorem example sample lorem example channels are particularly relevant, with sample lorem example sample lorem example and sample lorem example indicated to account for under half of the market in 2019.

Whilst the channel has sample lorem sample lorem share in the last few years, the sample lorem and sample lorem remain sample lorem in the market with sales estimated to be in excess of £xx0 million to year end December 2019.

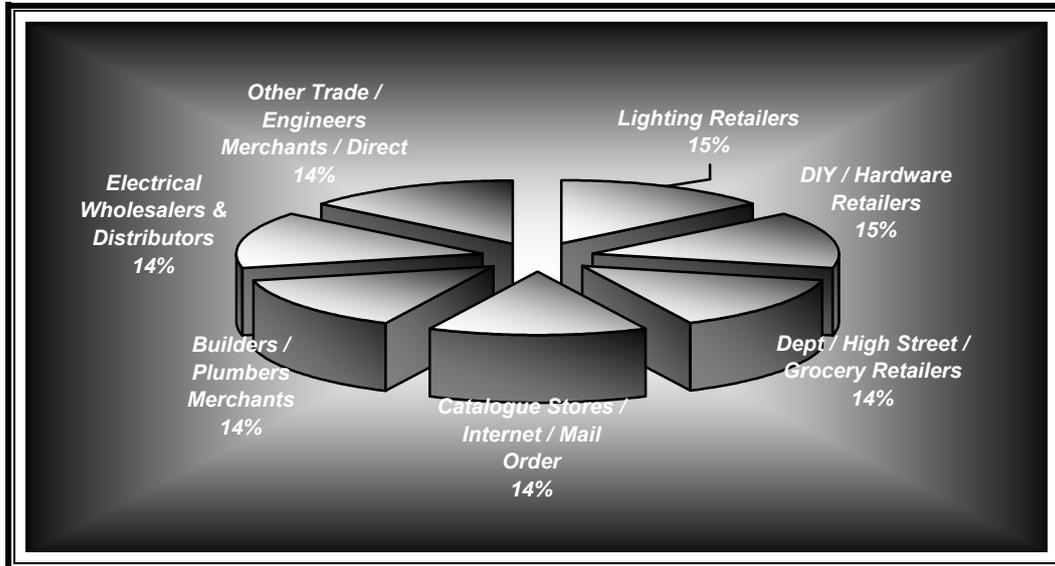
Within the domestic market, the sample lorem are estimated to account for a substantial proportion of the market, at just under x%, with sales estimated at

just over £x million at MSP in 2019. This share translates to a share of the overall lighting market of around 18% in 2019.

5.2.2 Lighting Sales Share by Distribution Channel 2013

In order to provide an historical context, the following chart illustrates the share by channel for sales of lighting products in 2013:-

Figure 334: Sales of Lighting Share by Key Distribution Channel 2013



Source: MTW Research / Trade Sources

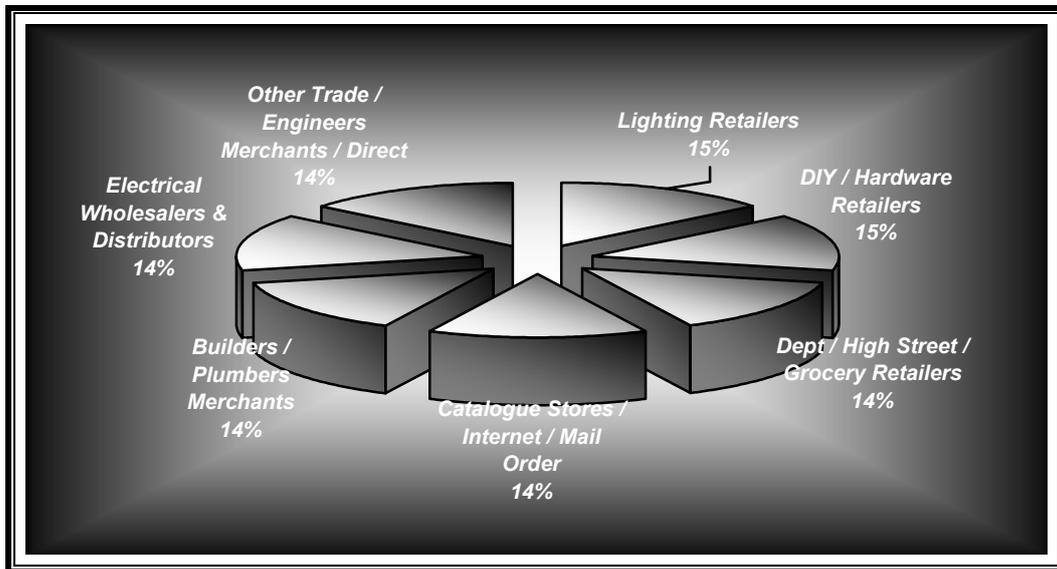
The shares accounted for by the key channels in the UK lighting market have been heavily influenced by the sample lorem sample lorem sample lorem which was then followed by sample lorem sample lorem for the next 3 years. This resulted in a sample lorem sample lorem sample lorem in the sample lorem sample lorem of RMI and new build activity across a sample lorem sample lorem of sectors, sample lorem demand from contractors and sample lorem sample lorem channels. As a result, sources indicate that the sample lorem sample lorem channel sample lorem sample lorem share of the market in the last few years, with sample lorem sample lorem sales also sample lorem.

The sample lorem of LED technology across the sample lorem has led to a sample lorem sample lorem in the number of sample lorem suppliers sample lorem the market, using the sample lorem as a key distribution tool. Whilst these activities are sample lorem sample lorem in nature than the sample lorem, sample lorem suppliers, the sample lorem sample lorem sample lorem has resulted in this channel having gained share in recent years. In 2013, our estimates were that sales via the sample lorem stood at around £xvx million with this now having sample lorem to £xxx million at manufacturers selling prices, reflecting a sample lorem channel and one which is likely to continue to sample lorem in the medium to longer term.

5.2.3 Distribution Channel Share for Lighting Forecasts 2019

The following chart illustrates our forecasts for the share by channel for sales of lighting products in 2023 (figures changed in sample):-

Figure 335: Forecast Share for Lighting Sales by Distribution Channel 2023



Source: MTW Research / Trade Sources

As the

6. Independent Lighting Retailers Market Size & Trends 2013-2023

In order to offer a comprehensive and easy to use marketing tool, this report includes:-

Independent Lighting Retailers Industry Overview 2013-2023

Overview of the industry's performance 2013-2019 and forecasts to 2023, including:-

- Total Industry Sales Turnover 2013-2023 & Key Trends
- Market Share by Growing, Declining & Static Sales Companies to 2019
- Market Share Mix by Employee Numbers & Turnover Size in 2019
- Market Mix for Credit Worthiness & Risk Ratings in October 2019
- Total Industry Profitability, Assets & Liabilities, Net Worth

Lighting Retail Industry Performance 2013-2023

A profile of the independent lighting retailer market:-

- Lighting Retailers Company Sales Revenue 2013-2023
- Industry Profit Levels 2013-2023
- Industry Assets & Liabilities 2013-2023
- Retailers Net Worth 2013-2023
- Retailers Industry Sales per Employee 2013-2023

Lighting Retailers Market Ranking

Provided for the leading companies in tabular format:-

- By Turnover & Individual Sales Revenue Estimates for 2018
- By Profit
- By Total, Combined Assets
- By Net Worth
- By Number of Employees

Company Profile & Sales Leads

Financial data and estimates provided for the last 4 years of trading for every company:-

- Turnover & Profit estimates for every company listed for 2018
- Working Capital (i.e. Cash Available),
- Sales & Profit Per Employee (where reported)
- Fixed Assets (e.g. value of land, buildings, vehicles, equipment etc)
- Current Assets (i.e. cash & other assets to be sold within 1 year)
- Current Liabilities (i.e. debts or obligations due in 1 year)
- Long Term Liabilities (i.e. debts or obligations which extend beyond 1 year)
- Net Worth (i.e. total assets less total liabilities)
- Company's Principal Activities
- Full Registered Address & Postcode
- Incorporation Date
- Ultimate Holding Company & Parent Company (if applicable)
- Number of Employees (estimates given where no data exists from Companies House)
- Senior Decision Maker / Director Contact Name

Also provided as part of the "Ultimate Pack" for this report is a comprehensive, multi-use mailing and telemarketing list and a comprehensive financial spreadsheet including 4 years key financial data for the industry.

6.1 Lighting Retailers Industry Competitor Listing

The following table provides a listing of the companies which are ranked and profiled in this report.

Figure 336: Lighting Retailers Company Listing

- Sample Retailer
- Sample Retailer
- Sample Retailer

6.2 Lighting Retailers Market Performance 2013-2023

The following section reviews the overall, combined performance of the UK lighting retailers market, in terms of sales revenue, profit, assets, liabilities and net worth since 2013 and provides forecasts to 2018.

6.2.1 Lighting Retailers Market Sales Revenue 2013-2023

The following table illustrates the performance of the lighting retailers market in terms of combined sales revenues between 2013 and 2019 and forecasts to 2023:- Longer term.

7. Independent Lighting Retailers Company Rankings

7.1 Introduction to the Rankings

The following section ranks the companies identified in the previous chapter by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation and inclusion or otherwise of an organisation in this section does not necessarily indicate a company's relevance in the market.

7.2 Lighting Retailers Companies' Sales Estimates & Turnover Rank

7.2.1 Lighting Retailers Ranking by Turnover - 2018

The table illustrates our estimates of the turnover rank for each lighting retailer in 2018:-

Table 348: Ranking by Turnover 2018 - Lighting Retailers

1.	44. Sample Lorem Ipsum	88. Sample Lorem Ipsum
1. Sample Lorem Ipsum	45. Sample Lorem Ipsum	89. Sample Lorem Ipsum
2. Sample Lorem Ipsum	46. Sample Lorem Ipsum	90. Sample Lorem Ipsum
3. Sample Lorem Ipsum	47. Sample Lorem Ipsum	91. Sample Lorem Ipsum
4. Sample Lorem Ipsum	48. Sample Lorem Ipsum	92. Sample Lorem Ipsum
5. Sample Lorem Ipsum	49. Sample Lorem Ipsum	
6. Sample Lorem Ipsum	50. Sample Lorem Ipsum	
7. Sample Lorem Ipsum	51. Sample Lorem Ipsum	
8. Sample Lorem Ipsum	52. Sample Lorem Ipsum	
9. Sample Lorem Ipsum	53. Sample Lorem Ipsum	
10. Sample Lorem Ipsum	54. Sample Lorem Ipsum	
11. Sample Lorem Ipsum	55. Sample Lorem Ipsum	
12. Sample Lorem Ipsum	56. Sample Lorem Ipsum	
13. Sample Lorem Ipsum	57. Sample Lorem Ipsum	
14. Sample Lorem Ipsum	58. Sample Lorem Ipsum	
15. Sample Lorem Ipsum	59. Sample Lorem Ipsum	
16. Sample Lorem Ipsum	60. Sample Lorem Ipsum	
17. Sample Lorem Ipsum	61. Sample Lorem Ipsum	
18. Sample Lorem Ipsum	62. Sample Lorem Ipsum	
19. Sample Lorem Ipsum	63. Sample Lorem Ipsum	
20. Sample Lorem Ipsum	64. Sample Lorem Ipsum	
21. Sample Lorem Ipsum	65. Sample Lorem Ipsum	
22. Sample Lorem Ipsum	66. Sample Lorem Ipsum	
23. Sample Lorem Ipsum	67. Sample Lorem Ipsum	
24. Sample Lorem Ipsum	68. Sample Lorem Ipsum	
25. Sample Lorem Ipsum	69. Sample Lorem Ipsum	
26. Sample Lorem Ipsum	70. Sample Lorem Ipsum	
27. Sample Lorem Ipsum	71. Sample Lorem Ipsum	
28. Sample Lorem Ipsum	72. Sample Lorem Ipsum	
29. Sample Lorem Ipsum	73. Sample Lorem Ipsum	
30. Sample Lorem Ipsum	74. Sample Lorem Ipsum	
31. Sample Lorem Ipsum	75. Sample Lorem Ipsum	
32. Sample Lorem Ipsum	76. Sample Lorem Ipsum	
33. Sample Lorem Ipsum	77. Sample Lorem Ipsum	
34. Sample Lorem Ipsum	78. Sample Lorem Ipsum	
35. Sample Lorem Ipsum	79. Sample Lorem Ipsum	
36. Sample Lorem Ipsum	80. Sample Lorem Ipsum	
37. Sample Lorem Ipsum	81. Sample Lorem Ipsum	
38. Sample Lorem Ipsum	82. Sample Lorem Ipsum	
39. Sample Lorem Ipsum	83. Sample Lorem Ipsum	
40. Sample Lorem Ipsum	84. Sample Lorem Ipsum	
41. Sample Lorem Ipsum	85. Sample Lorem Ipsum	
42. Sample Lorem Ipsum	86. Sample Lorem Ipsum	
43. Sample Lorem Ipsum	87. Sample Lorem Ipsum	

Source: MTW Research / Company Accounts

7.3 Lighting Retailers Ranking by Profit

The following table illustrates our estimates of the rank by profit for each of the lighting retailers in 2018:-

Table 350: Ranking by Profit 2018 - Lighting Retailers

1. Sample co	32. Sample co	63. Sample co
2. Sample co	33. Sample co	64. Sample co
3. Sample co	34. Sample co	65. Sample co
4. Sample co	35. Sample co	66. Sample co
5. Sample co	36. Sample co	67. Sample co
6. Sample co	37. Sample co	68. Sample co
7. Sample co	38. Sample co	69. Sample co
8. Sample co	39. Sample co	70. Sample co
9. Sample co	40. Sample co	71. Sample co
10. Sample co	41. Sample co	72. Sample co
11. Sample co	42. Sample co	73. Sample co
12. Sample co	43. Sample co	74. Sample co
13. Sample co	44. Sample co	75. Sample co
14. Sample co	45. Sample co	76. Sample co
15. Sample co	46. Sample co	77. Sample co
16. Sample co	47. Sample co	78. Sample co
17. Sample co	48. Sample co	79. Sample co
18. Sample co	49. Sample co	80. Sample co
19. Sample co	50. Sample co	81. Sample co
20. Sample co	51. Sample co	82. Sample co
21. Sample co	52. Sample co	83. Sample co
22. Sample co	53. Sample co	84. Sample co
23. Sample co	54. Sample co	85. Sample co
24. Sample co	55. Sample co	86. Sample co
25. Sample co	56. Sample co	87. Sample co
26. Sample co	57. Sample co	88. Sample co
27. Sample co	58. Sample co	89. Sample co
28. Sample co	59. Sample co	90. Sample co
29. Sample co	60. Sample co	91. Sample co
30. Sample co	61. Sample co	92.)
31. Sample co	62. Sample co	

Source: MTW Research / Company Accounts

7.4 Company Ranking by Total Assets

The following table illustrates our estimates of the rank by total fixed and current assets for each of the lighting retailers in 2018:-

Table 351: Ranking by Assets 2018– Lighting Retailers

1. Sample co	32. Sample co	63. Sample co
2. Sample co	33. Sample co	64. Sample co
3. Sample co	34. Sample co	65. Sample co
4. Sample co	35. Sample co	66. Sample co
5. Sample co	36. Sample co	67. Sample co
6. Sample co	37. Sample co	68. Sample co
7. Sample co	38. Sample co	69. Sample co
8. Sample co	39. Sample co	70. Sample co
9. Sample co	40. Sample co	71. Sample co
10. Sample co	41. Sample co	72. Sample co
11. Sample co	42. Sample co	73. Sample co
12. Sample co	43. Sample co	74. Sample co
13. Sample co	44. Sample co	75. Sample co
14. Sample co	45. Sample co	76. Sample co
15. Sample co	46. Sample co	77. Sample co
16. Sample co	47. Sample co	78. Sample co
17. Sample co	48. Sample co	79. Sample co
18. Sample co	49. Sample co	80. Sample co
19. Sample co	50. Sample co	81. Sample co
20. Sample co	51. Sample co	82. Sample co
21. Sample co	52. Sample co	83. Sample co
22. Sample co	53. Sample co	84. Sample co
23. Sample co	54. Sample co	85. Sample co
24. Sample co	55. Sample co	86. Sample co
25. Sample co	56. Sample co	87. Sample co
26. Sample co	57. Sample co	88. Sample co
27. Sample co	58. Sample co	89. Sample co
28. Sample co	59. Sample co	90. Sample co
29. Sample co	60. Sample co	91. Sample co
30. Sample co	61. Sample co	
31. Sample co	62. Sample co	

Source: MTW Research / Company Accounts

7.5 Company Ranking by Net Worth

The following table illustrates our estimates of the rank by net worth for each lighting retailer:-

Table 352: Ranking by Net Worth 2013 – Lighting Retailers

1. Sample co	32. Sample co	63. Sample co
2. Sample co	33. Sample co	64. Sample co
3. Sample co	34. Sample co	65. Sample co
4. Sample co	35. Sample co	66. Sample co
5. Sample co	36. Sample co	67. Sample co
6. Sample co	37. Sample co	68. Sample co
7. Sample co	38. Sample co	69. Sample co
8. Sample co	39. Sample co	70. Sample co
9. Sample co	40. Sample co	71. Sample co
10. Sample co	41. Sample co	72. Sample co
11. Sample co	42. Sample co	73. Sample co
12. Sample co	43. Sample co	74. Sample co
13. Sample co	44. Sample co	75. Sample co
14. Sample co	45. Sample co	76. Sample co
15. Sample co	46. Sample co	77. Sample co
16. Sample co	47. Sample co	78. Sample co
17. Sample co	48. Sample co	79. Sample co
18. Sample co	49. Sample co	80. Sample co
19. Sample co	50. Sample co	81. Sample co
20. Sample co	51. Sample co	82. Sample co
21. Sample co	52. Sample co	83. Sample co
22. Sample co	53. Sample co	84. Sample co
23. Sample co	54. Sample co	85. Sample co
24. Sample co	55. Sample co	86. Sample co
25. Sample co	56. Sample co	87. Sample co
26. Sample co	57. Sample co	88. Sample co
27. Sample co	58. Sample co	89. Sample co
28. Sample co	59. Sample co	90. Sample co
29. Sample co	60. Sample co	91. Sample co
30. Sample co	61. Sample co	
31. Sample co	62. Sample co	

Source: MTW Research / Company Accounts

7.6 Ranking by Number of Employees

The following table illustrates our estimates of the rank by number of employees for each lighting retailers company in 2013:-

Table 353: Ranking by Number of Employees

1. Sample co	32. Sample co	63. Sample co
2. Sample co	33. Sample co	64. Sample co
3. Sample co	34. Sample co	65. Sample co
4. Sample co	35. Sample co	66. Sample co
5. Sample co	36. Sample co	67. Sample co
6. Sample co	37. Sample co	68. Sample co
7. Sample co	38. Sample co	69. Sample co
8. Sample co	39. Sample co	70. Sample co
9. Sample co	40. Sample co	71. Sample co
10. Sample co	41. Sample co	72. Sample co
11. Sample co	42. Sample co	73. Sample co
12. Sample co	43. Sample co	74. Sample co
13. Sample co	44. Sample co	75. Sample co
14. Sample co	45. Sample co	76. Sample co
15. Sample co	46. Sample co	77. Sample co
16. Sample co	47. Sample co	78. Sample co
17. Sample co	48. Sample co	79. Sample co
18. Sample co	49. Sample co	80. Sample co
19. Sample co	50. Sample co	81. Sample co
20. Sample co	51. Sample co	82. Sample co
21. Sample co	52. Sample co	83. Sample co
22. Sample co	53. Sample co	84. Sample co
23. Sample co	54. Sample co	85. Sample co
24. Sample co	55. Sample co	86. Sample co
25. Sample co	56. Sample co	87. Sample co
26. Sample co	57. Sample co	88. Sample co
27. Sample co	58. Sample co	89. Sample co
28. Sample co	59. Sample co	90. Sample co
29. Sample co	60. Sample co	91. Sample co
30. Sample co	61. Sample co	92. Sample co
31. Sample co	62. Sample co	

Source: MTW Research / Company Financials

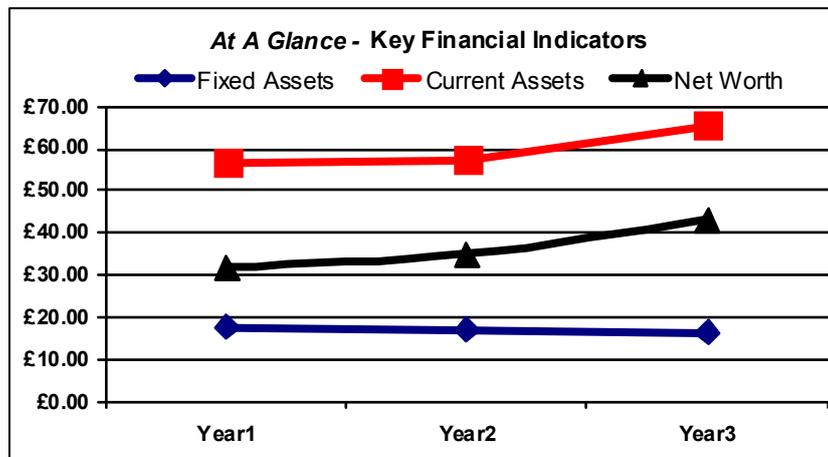
The following section provides a profile overview of the companies, coupled with a review of key financial performance indicators and an 'at a glance' financial health chart.

8. Lighting Retailers 1 Page Profiles

Samples Company - Company Overview & 'At a Glance'

1 Sample Lane
Sample
Sample
Dorset
SA17 7BY
Tel:

The Sample Company Limited is a private limited company, incorporated on 13th November 2012. The company's main activities are recorded by Companies House as "A Lighting Retailer." In 2019, the company has an estimated 500 employees.



To year end December 2018, The Sample Company Limited is estimated to have achieved a turnover of around £122 million. Pre-tax profit for the same period is estimated at around £9.15 million.

The following table briefly provides a top line overview on The Sample Company:-

Company Name	The Sample Company
Brief Description of Activities	Lighting Retailers.
Parent Company	
Ultimate Holding Company	
Estimated Number of Employees	500
Senior Decision Maker / Director	

The following table illustrates the company's key performance indicators for the last 3 years:-

The Sample Company - 3 Year Financials to Year End 31-Dec-18

Key Indicator £M	Year End 31-Dec-16 (Year1) £M	Year End 31-Dec-17 (Year2) £M	Year End 31-Dec-18 (Year3) £M
Fixed Assets	£17.63	£17.0	£16.39
Current Assets	£56.79	£57.24	£65.59
Current Liabilities	£25.56	£24.94	£28.43
Long Term Liabilities	£11.71	£8.47	£7.96
Net Worth	£31.68	£34.86	£43.24
Working Capital	£31.23	£32.3	£37.15
Profit per Employee	£0.011	£0.011	£0.012
Sales per Employee	£0.234	£0.242	£0.232

