

“SSL industry development and market new trends in Russia”

**BRICS WG meeting of ISA,
Hangzhou 2017**

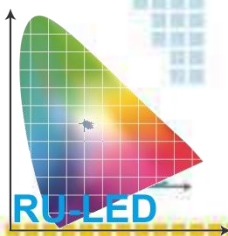
Russian Association of LED and SSL
manufacturer

Evgeny Dolin

General Manager - Independent Member of the Board

E-mail: dolin@nprpss.ru

www.nprpss.ru



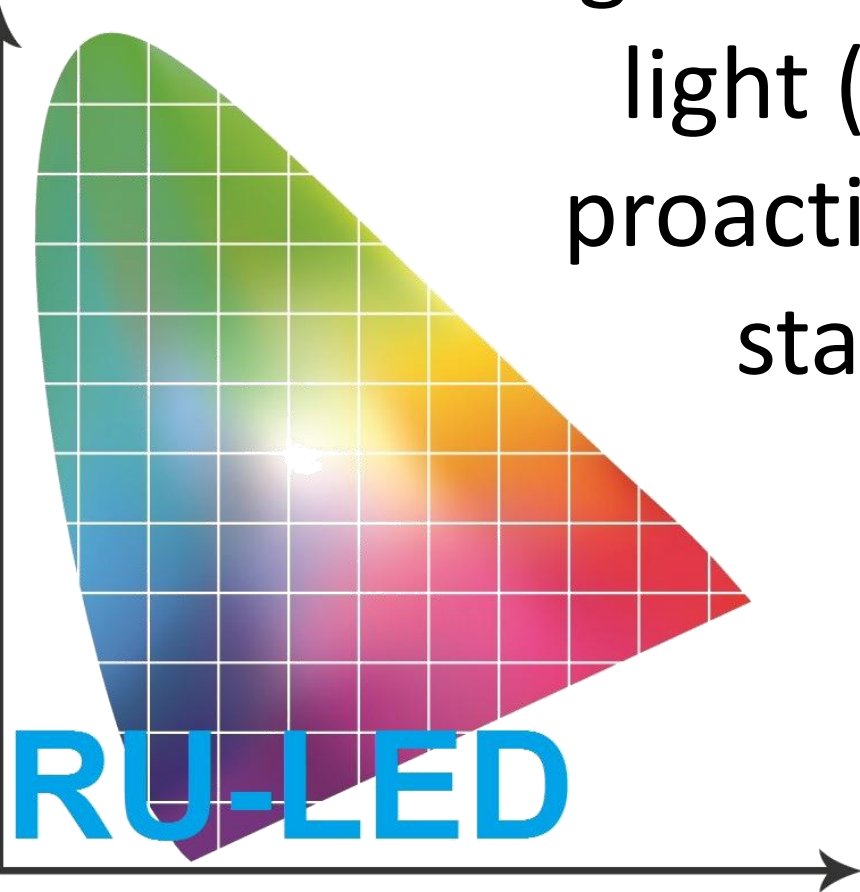
New name : Ru-LED ASSN - The only Russian National Association of Manufacturers.



Established in 2010.
Now includes 26 Members -
leading Russian
manufacturers of LEDs and
LED lighting.



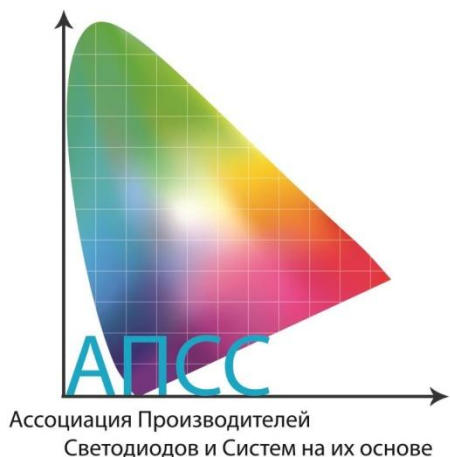
New Mission -active
growing national market of
light (all!!) in volume and
proactive creating rules and
standards of honest
competition.



Russia - what's happening on the SSL market?

- SSL penetration in prof segment more than ~~50~~ **75%**, but lost in total.
- LED companies start new round of competition.
- Illegal import under the pressure.
- Government and market makers support new great LED promo events together.



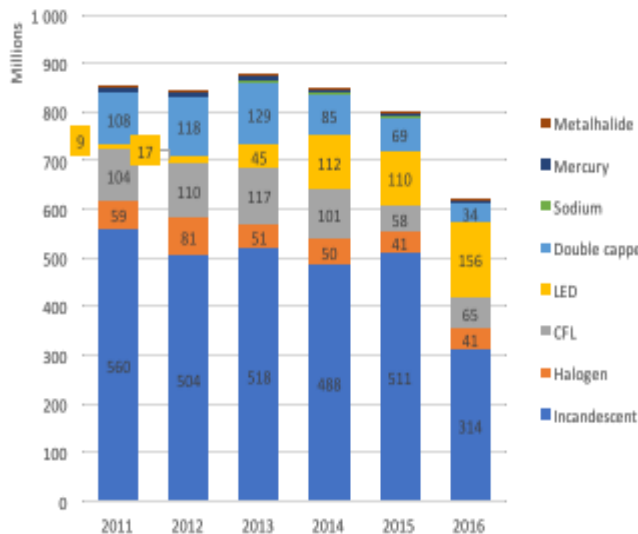


Lamp & Professional Luminaries Market of the Russian Federation in 2016

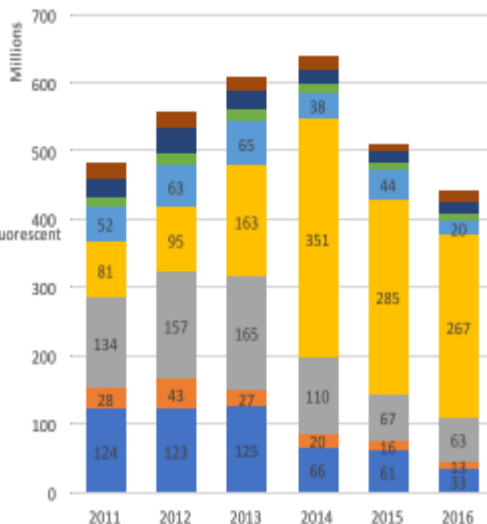
Lighting Business Consulting and RU LED Association

Lamps Market

Mln pcs



Mln €

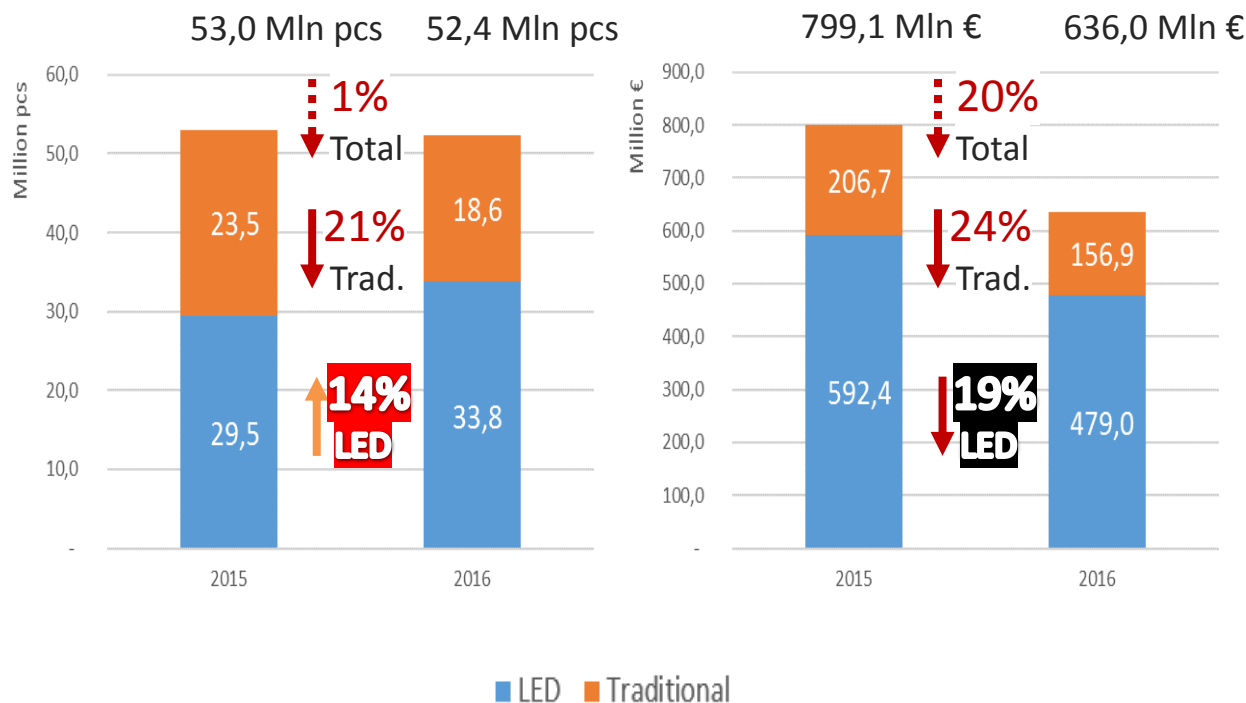


Learnings:

- Overall lamps market in 2016 decreased by 22 % in volume and by 14 % in value due economic situation in Russia
- LED lamps market:
 - Increased in volume thanks to increase of demand for energy efficient lighting stimulated by Russian Government
 - decreased in value due to significant price erosion as a consequence of cost price decrease for LED technology and strong competition for the customers
- Traditional lamps market :
 - decreased both in volume and value due to decrease of customers demand for non-efficient light sources.

Mln pcs			Mln €	
2015	2016		2015	2016
110,1 (13,8%)	155,7 (25,2%)	LED	285,3 (55,8%)	267,3 (60,7%)
685,9 (86,2%)	462,3 (74,8%)	Traditional	225,5 (44,2%)	173,1 (39,3%)
796,1	618,0	Total	510,8	440,5

Professional Luminaries Market



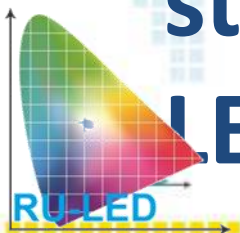
Learnings:

- Overall Market in 2016 in Russia: decreased slightly in volume decreased sharply in value due to significant price erosion of LED luminaries and strong competition.
- LED luminaries market:
 - Increased in volume thanks to sharp increase in demand in Housing and Public Lighting (H&PL) segment due to Federal target program "Housing" 2015-2020
 - decreased in value due to large reduction of average selling price (as a consequence of cost price decrease for LED technology)
- Traditional luminaries market :
 - decreased both in volume and value due the fact that LED lums' prices matched the prices of traditional ones and consumers select LED.

Mln pcs			Mln €	
2015	2016		2015	2016
29,5 (55,7%)	33,8 (64,5%)	LED	592,4 (74,1%)	479,0 (75,3%)
23,5 (44,3%)	18,6 (35,5%)	Traditional	206,7 (25,9%)	156,9 (24,7%)
53,0	52,4	Total	799,1	636,0

Major initiatives in the Russian LED market.

- Initiative “Ethical Charter for import” becomes reality.
- New standards for LED Lightings in schools.
- National festival "Together - brighter “
- First Eurasian Award “Golden Photon” starts now with support from RU - LED.



About the Award



GOLDEN PHOTON
Eurasian Lighting Award

The “Golden Photon” is the main annual event in the lighting industry for the countries of the Eurasian Economic Community.



Award's Goal

- Identify the best companies in the lighting industry that are focused on creating innovative and energy-efficient products, satisfying the needs of end-customers and setting high product quality standards.
- Help end customers in choosing best lighting products and partners

Categories and Nominations



GOLDEN PHOTON
Eurasian Lighting Award

Product of the Year (LED luminaire)

- Downlight
- Troffer
- Batten
- Waterproof
- High-bay/Low-bay
- Projector
- Streetlight
- Housing and Communal services

Product of the Year (LED lamp)

- Lamp E14
- Lamp E27
- Filament E14
- Filament E27
- Lamp G13

Project of the Year

- Office lighting
- Retail lighting
- ESCO project
- Housing and Communal services lighting
- Industrial lighting
- School lighting

VARTON

ne:esrus

БЕЛЫЙ СВЕТ
СВЕТОВОД

LEDeffect
ЭНЕРГОСБЕРЕГАЮЩИЕ СИСТЕМЫ ОСВЕЩЕНИЯ

OPTOGAN
Российские светодиоды

ecolight

INTESSO
СВЕТОДИОДНЫЕ СИСТЕМЫ



Lampyris
Lights in your life



TUSUR TUSUR UNIVERSITY

IntiLED
КАЧЕСТВЕННЫЕ
СВЕТОДИОДНЫЕ
РЕШЕНИЯ

ИНТЕХ
ИНЖИНИРИНГ



Ростехнологии

Росэлектроника

Thank you and welcome
to the Russian market of
LED technology!
We are open to any form
of cooperation.



**Световые
Технологии**

GALAD

ПЛАНАР
СВЕТОТЕХНИКА

ФЕРЕКС
светодиодные решения

**СВЕТЛАНА-
ОПТОЭЛЕКТРОНИКА**

LEDEL

ОКУС

РУСАМОКС



ЭЛЕКТРОТОЧПРИБОР

Центрстр^ойсвет

