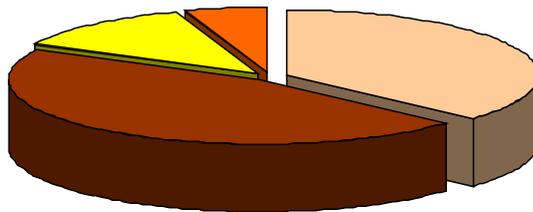


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New Study from ElectroniCast Consultants

United States Flashlight Market Forecast & Analysis 2014 - 2021



ElectroniCast Consultants



United States Flashlight Market Forecast & Analysis 2014 - 2021

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This is the ElectroniCast analysis and forecast of the use of flashlights in the United States. In regions outside of the United States, flashlights are often referred to as “torches.” Flashlights are portable electric-powered light source. The primary power source of a flashlight is batteries (rechargeable or disposable); however, power sources can often include ultra-capacitors, electromagnetic induction, solar power, and hand powered dynamos.

In the process of this market research project, in addition to interviewing existing customers and distributors of flashlights, ElectroniCast Consultants also studied over 60 flashlight manufactures/brands with various ranges of performance, price, power-source, light source and other variables, as well as competitor market share estimates.

Market Forecast Application Categories This market forecast of each product-type by the following end-user type (application) categories:

- Commercial/Industrial
- Government-Sector
 - Military/Law Enforcement/First Responders
 - Other Government-Sector
- Consumer/Non-Specific

Market Forecast, By Function This report provides the 2014 market data review and 2015-2021 forecast for flashlights by the following functions:

- Consumption Value
- Quantity (number/units)
- Average Selling Prices

Market Forecast, by Light Source In this study, we provide a market forecast and analysis for the use of flashlights in the United States based on the following light source types, as well as flashlights equipped for recharging versus standard (not rechargeable/equipped types):

- Light Emitting Diode (LED) Flashlight
 - Rechargeable
 - Standard
- Halogen Incandescent Flashlight
 - Rechargeable
 - Standard
- Argon or Krypton Incandescent Flashlight
 - Rechargeable
 - Standard
- Xenon Incandescent Flashlight
 - Rechargeable
 - Standard
- Fluorescent Flashlight
 - Rechargeable
 - Standard
- High-Intensity Discharge (HID) Flashlight
 - Rechargeable
 - Standard

A typical flashlight is a hand held unit, however, flashlights are often mounted on weapons, which are tactical flashlights used by the military, law enforcement or even recreationally by hunters. Flashlights are mounted to helmets or for recreational and work use. In fact, the list of different uses of these portable (cordless) light units is close to endless; therefore, the flashlight industry is constantly driven to identify innovative applications and designs.

Some flashlights have more than one light source, for example a fluorescent flashlight from Makita also has an incandescent light source; however, the differentiation is that it is a fluorescent flashlight – so, ElectroniCast counts the flashlight as a fluorescent flashlight. ElectroniCast does not “double-count” the quantity of flashlights; therefore, we tend to evaluate the flashlight and assign it a classification based on the main market-push (objective) from the particular supplier (“HID Flashlight with LED,” are classified as a HID flashlight).

Through research and development (R&D), manufacturers are striving to differentiate themselves from competitors, by means of customer end-markets (applications), lumens/brightness, durability, sales/distribution channels, or a patriotic appeal to purchase products that are made and designed in the United States (“Made in the USA”).

Since the market opportunity for flashlights continues to evolve, through the push by manufacturers to differentiate from each other to achieve increasing revenue, there is a need to explore technology-driven solutions addressing, but not limited to the list shown below. The relationship of cost of materials, along with the end-user price-points, are important considerations for flashlight manufacturers; however, there are many other items of interest to consider in finding ways to differentiate from your competitors.

Flashlight

- Casing: Durable/stronger and/or lighter material, design/color, other
- Circuit, Contact, Interior Parts, Switch: energy-efficiency, spark-proof, durability
- Reflector: Durable, designs to increase reflectance and lumen/brightness, other
- Lens, Lens Seal and Face Cap: Durable, focus-ability/adjustable, heat-resistance, other
- Light Source: Durable, size, lumen/brightness, energy-efficiency, spark-proof, life-capacity (hours), other
- Recharging Interface: Integration design from flashlight to recharge unit, material, size, durability, other

Power Source

- Battery: Size, weight, shape, run-time (hours), replacement availability, other
 - Primary (disposable) battery types used in flashlights include button cells, carbon-zinc batteries in both regular and heavy-duty types, alkaline, and lithium
 - Secondary (rechargeable) battery types include lead acid batteries, NiMH, NiCd batteries and lithium ion
- Ultra-capacitors/Super-capacitor:
 - The capacitor can be recharged more rapidly than a battery and can be recharged many times without loss of capacity; however, the running time is limited by the relative bulk of capacitors compared to electrochemical cells
- Electromagnetic Induction
- Solar power
- Hand powered dynamos

About ElectroniCast

ElectroniCast, founded in 1981, specializes in forecasting technology and global market trends in fiber optics communication components and devices, as well providing market data on light emitting diodes used in lighting.

As an independent consultancy we offer multi-client and custom market research studies to the world's leading companies based on comprehensive, in-depth analysis of quantitative and qualitative factors. This includes technology forecasting, markets and applications forecasting, strategic planning, competitive analysis, customer-satisfaction surveys and marketing/sales consultation. ElectroniCast, founded as a technology-based independent consulting firm, meets the information needs of the investment community, industry planners and related suppliers.

Market Research Methodology

Market analysis and technology forecasting are complex tasks. Any predictions of the shape and trends of technology and economic movement start from the notion that the germ of what will be important tomorrow is present, although smaller or larger or in a different form, in our environment today. However, taking as a basis for a prediction the assumptions of current, conventional belief creates a set of preconceived notions that can lead to serious mistakes. ElectroniCast, instead, looks to the basic driving forces.

Information Base

This study is based on analysis of information obtained continually over the past several years, but updated through the end of June 2015. During this period, ElectroniCast analysts performed interviews with authoritative and representative individuals in the LED manufacturing (materials, chips, packaging, devices, associated parts/pieces, fittings/fixtures, NVIS filters), other light sources and military/aerospace, law enforcement and other first responders, communication, automotive, medical services, R&D, and government regulating authorities, as well as power sources (batteries and capacitors). The interviews were conducted principally with:

- Engineers, marketing personnel and management at manufacturers of LEDs as well as other technologies.
- Design group leaders, engineers, marketing personnel and market planners at major users and potential users and distributors of LEDs, other light sources, flashlights and power sources (batteries and capacitors).
- Other industry/sector experts, including those focused on patents/intellectual property, standards activities, trade associations, and investments.

The interviews covered issues of technology, R&D support, pricing, contract size, reliability, documentation, installation/maintenance crafts, standards, supplier competition and other topics. Customer (purchase decision-makers and purchase influence/consultants) and distributors also were interviewed, to obtain their estimates of quantities received and average prices paid. Customer estimates of historical and expected near term future growth of their application are obtained. Their views of use of new technology products were obtained.

The analyst then considered customer expectations of near term growth in their application, plus forecasted economic payback of investment, technology trends and changes in government regulations in each geographical region, to derive estimated growth rates of quantity and price of each product subset in each application. These forecasted growth rates are combined with the estimated baseline data to obtain the long-range forecasts at the lowest detailed level of each product and application.

A full review of published information was also performed to supplement information obtained through interviews. The following sources were reviewed:

- Professional technical journals and papers
- Trade press articles
- Technical conference proceedings
- Product literature
- Company profile and financial information
- Additional information based on previous ElectroniCast studies
- Personal knowledge of the research team.

In analyzing and forecasting the complexities of worldwide markets for light emitting diode products, it is essential that the market research team have a good and a deep understanding of the technology and of the industry. ElectroniCast consultants who participated in this report were qualified.

Proprietary Statement

All data and other information contained in this data base are proprietary to ElectroniCast and may not be distributed or provided in either original or reproduced form to anyone outside the client's internal employee organization, without prior written permission of ElectroniCast.

ElectroniCast, in addition to multiple-client programs, conducts proprietary custom studies for single clients in all areas of management planning and interest. Other independent consultants, therefore, are considered directly competitive. ElectroniCast proprietary information may not be provided to such consultants without written permission from ElectroniCast Consultants.

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ASP, Inc. (Armament Systems and Procedures)
Bayco
Blackbeam LLC (Blackfire ®)
Black Diamond
Brinkmann Corporation
Brite-Strike Technologies Incorporated
Bushnell Outdoor Products
CatEye Company, Limited
Coast Products
Coleman Company, Incorporated
Cool View (Hawkeye Distributing, LLC)
Craftsman (KCD IP, LLC – Sears Holdings)
Dorcy International, Inc.
Duracell (Procter & Gamble)
EagleTac-USA.com
Energizer Holdings / Eveready
FenixLight Limited
5.11, Incorporated (5.11 TACTICAL®)
FourSevens (4Sevens)
FoxFury Lighting Solutions
Gerber
Innovative Wireless Technologies Inc. (Kellan™)
Iwiss Electric Co., Ltd
Klarus Lighting Technology Co., Ltd
Koehler – Bright Star LLC / Koehler Lighting Products
L-3 Commercial Products Group (EOTech / Insight Technology)
Larson Electronics LLC (MagnaLite Brand)
Life+Gear
Longxing Optoelectronic Technology Co., Ltd.
Lumencraft (Gatlight)
Mag Instrument Incorporated (MAGLITE®)
Makita
Matsushita (Tat Ming Holding Group)
Microbluebear Technology Company, Ltd. (Shenzhen) - ACEBEAM®
MicroFire Technology Company, Ltd.)
Micronix Systems Inc. (Identify Surgical Headlamp)
NexTorch
Nightcore®
Nite Ize (INOVA Brand)
Panasonic
Philips (Royal Philips Electronics)
Pelican Products, Inc (Behrman Capital)
Petzl

Pila (Electronic Services Agency)
Princeton Tec
Promire Products
Rayovac / Black & Decker (Spectrum Brands)
Smith & Wesson Holding Corporation
Snap-on Incorporated
Streamlight Incorporated
Sunwayman
SureFire
Techtronic Industries Co. Ltd (TTI) /Milwaukee Electric Tool / Ryobi Limited
ThruNite
TigerLight, Inc.
Toshiba
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XeVision™
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NEWS RELEASE



ElectroniCast Consultants

Market Forecast – Flashlights used in the U.S.A.

According to ElectroniCast, flashlights with a LED light source held 90% percent of the consumption value market share in 2014.

Aptos, CA (USA)—July 8, 2015 -- ElectroniCast Consultants, a leading market research firm covering photonic and electronic devices, today announced the findings of their market forecast study of the use of flashlights in the United States. According to the market study, a projected 151.8 million flashlights will be purchased for use in the United States in 2015, an increase of 6.7 percent versus 2014.

Flashlights with a light emitting diode (LED) light source dominate the overall product mix. Additionally, the LED-based flashlights are forecast to continue displacing other light-source types of flashlights through the year 2021. In addition to LED flashlights, the market study covers the use of Halogen, Argon/Krypton Incandescent, Xenon Incandescent, Fluorescent and High-Intensity Discharge (HID). In 2014, flashlights with a LED light source held a 90 percent market share in consumption value.

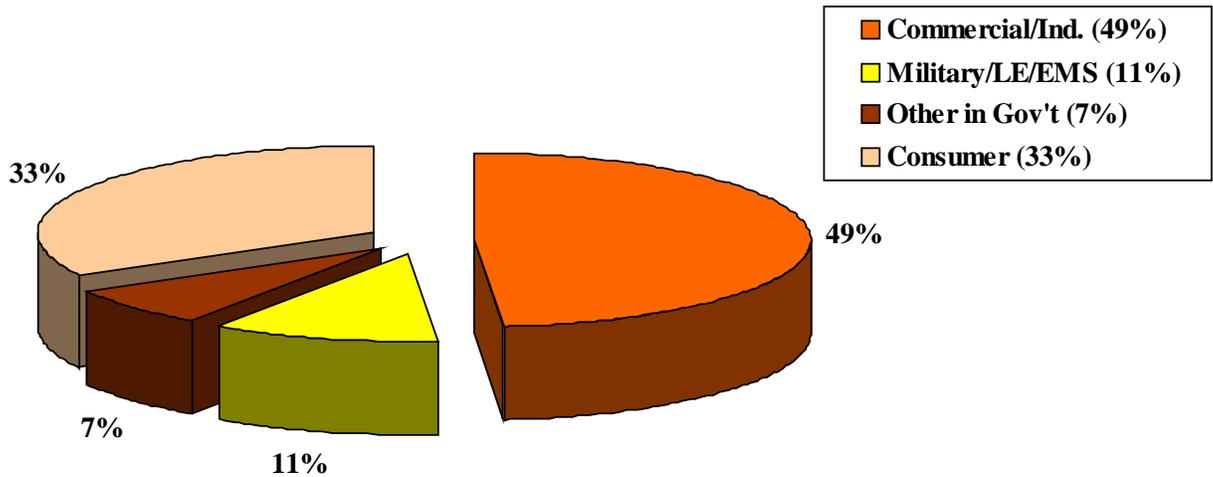
The ElectroniCast study also segments the use of flashlights by end-user groups, including: Government use in Military/Law Enforcement (LE)/Emergency Services (EMS); other user groups in Government; Commercial/Industrial; and Consumer applications. In 2014, the Commercial/Industrial application held a 49 percent market share in consumption value. The value of flashlights used in the household or Consumer application segment was \$483.6 million with a 33 percent in market share, followed by the Military, Law Enforcement, First Responder sector, and finally the “Other” Government user group segment.

Flashlights used in the Consumer end-user segment are typically less expensive units versus other applications/end-user groups. For example, flashlights used by the United States Military and in Law Enforcement, demand (more) rugged designed, more features and (more) lumens or brightness versus the typical household (consumer) flashlights.

Last year (2014), the Commercial/Industrial application led in the consumption value of flashlights in the United States...

**United States Flashlight Market Forecast, By Application
(\$1.46 Billion in 2014)**

Source: ElectroniCast Consultants



The fee-based market forecast report is available immediately from ElectroniCast Consultants. For detailed information on this or other services provided by ElectroniCast, please contact Theresa Hosking, Marketing/Sales; thosking@electronicastconsultants.com (Telephone/USA: 831-708-2381)

ElectroniCast Consultants – www.electronicast.com specializes in forecasting trends in technology forecasting, markets and applications forecasting, strategic planning and consulting. ElectroniCast Consultants, as a technology-based independent forecasting firm, serves industrial companies, trade associations, government agencies, communication and data network companies and the financial community. Reduction of the risk of major investment decisions is the main benefit provided. ElectroniCast Consultants' goal is to understand the challenges and opportunities facing clients and to provide timely, accurate information for strategic planning.

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