

# PHILIPS

sense **and** simplicity

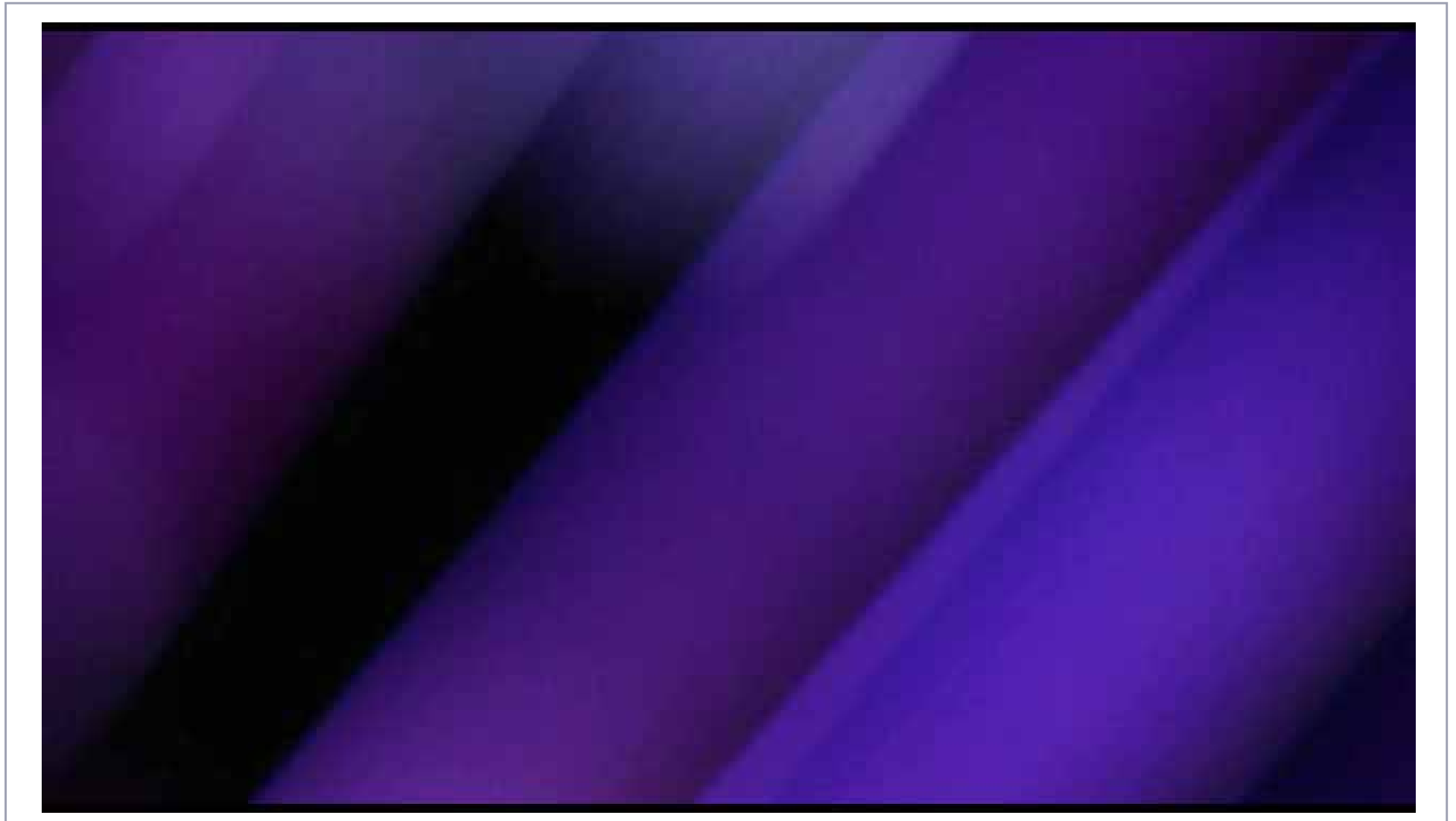
## Luminaires: In Shape for the Future

René van Schooten

CEO Business Group Professional Luminaires

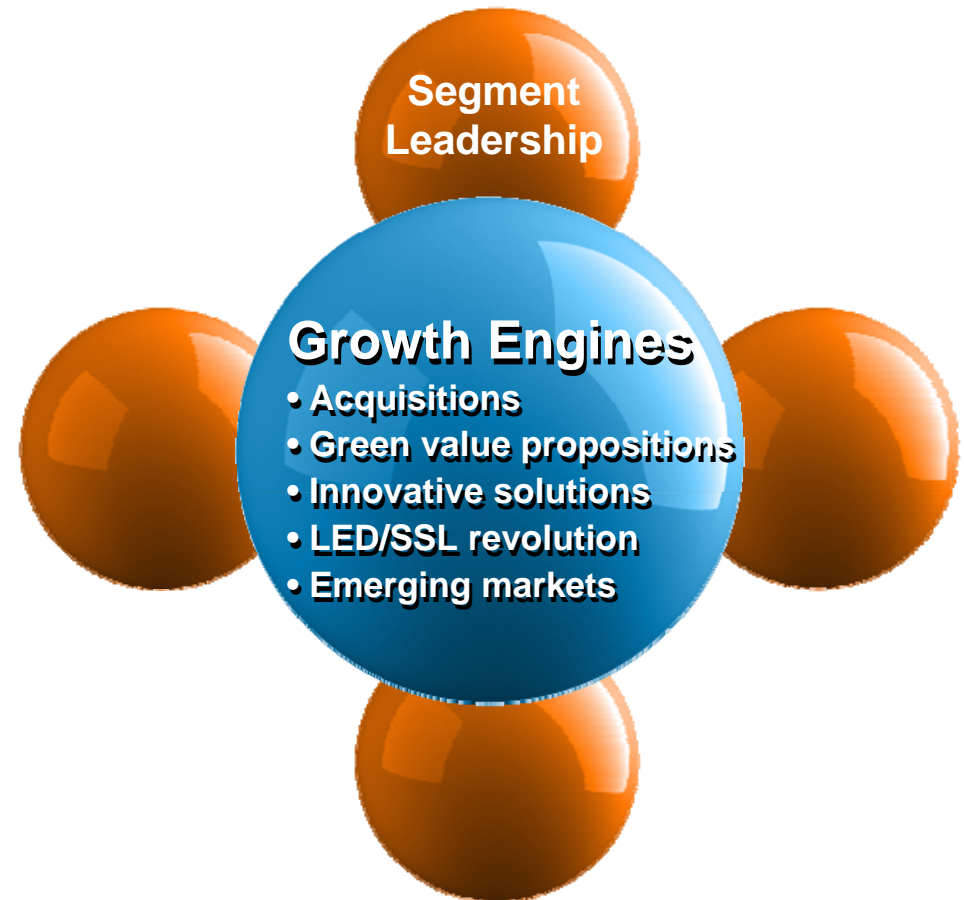
# Philips changes standards in lighting

Harrah's, Las Vegas, US (film)

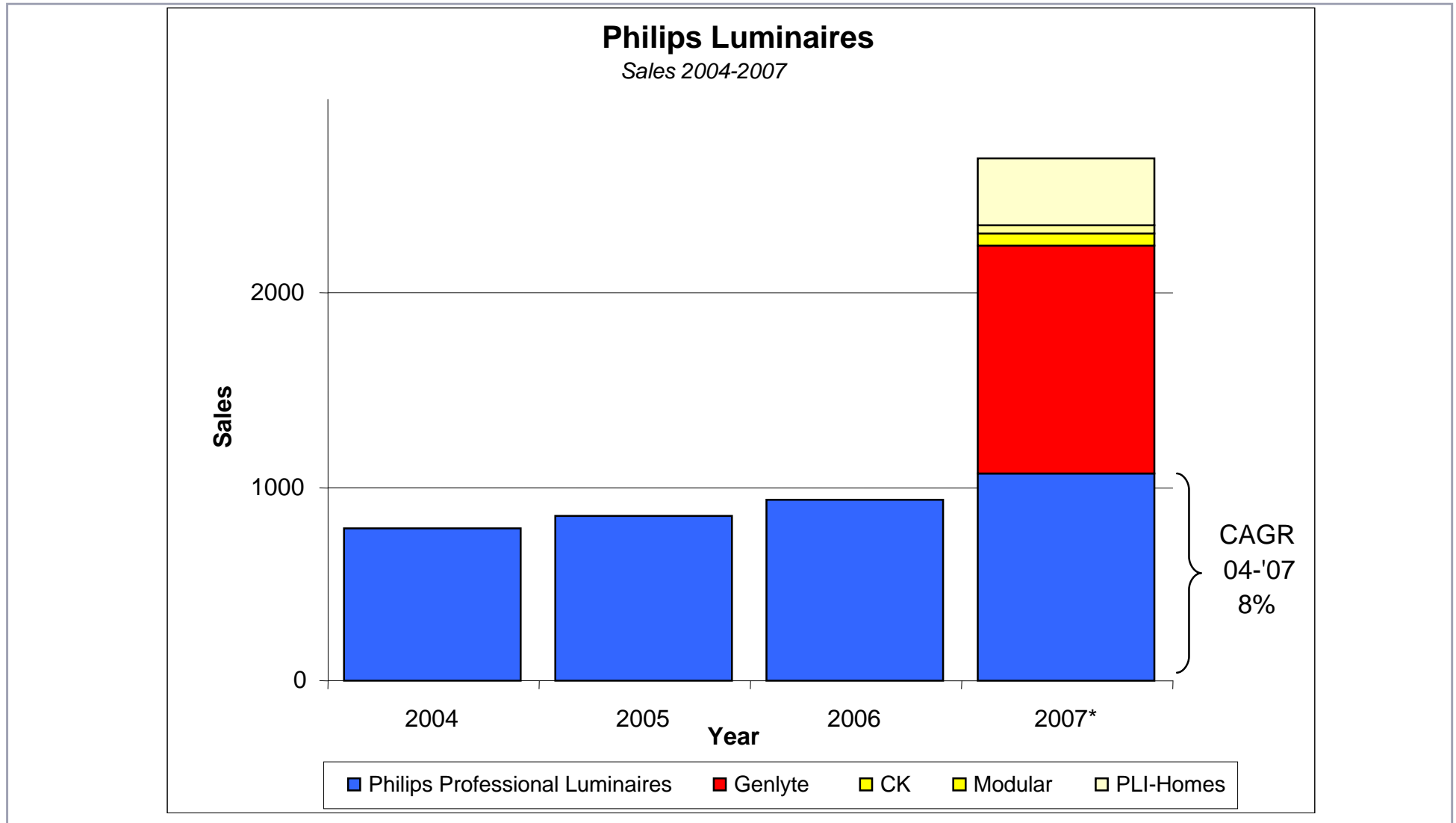


# Agenda

- The Luminaires opportunity
- In Shape for the future
  - Segment leadership
  - Growth Engines
    - Acquisitions
    - Green value propositions
    - Innovative solutions
    - LED/SSL revolution
    - Emerging Markets



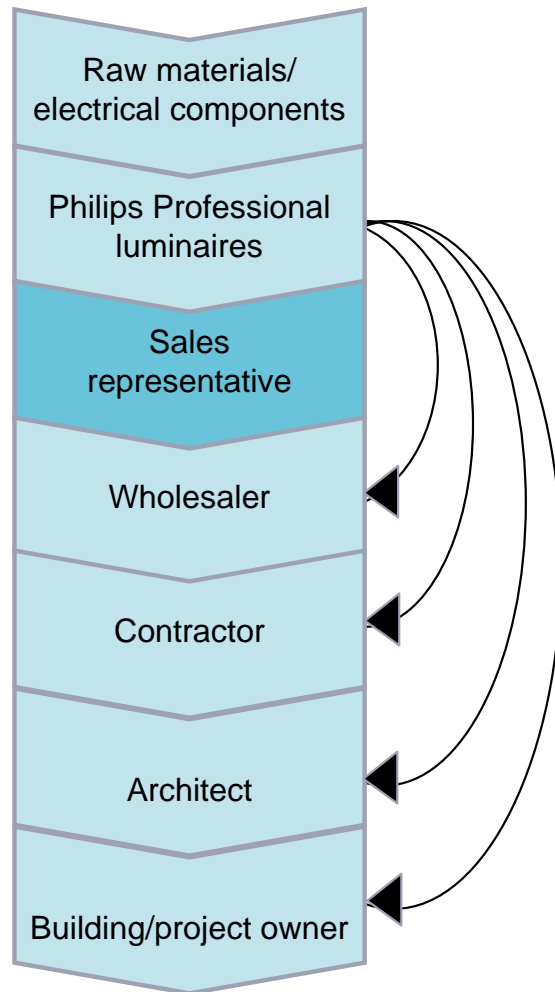
# Philips has increased focus on Luminaires



\* As if acquisitions were fully consolidated in 2007

## Working together building business

### Professional luminaires = solutions = projects



### Total solution

- Asklepios Klinik – Hamburg, Germany
- Lighting the complete hospital



## Value creation by driving the transition to SSL

### From components to applications

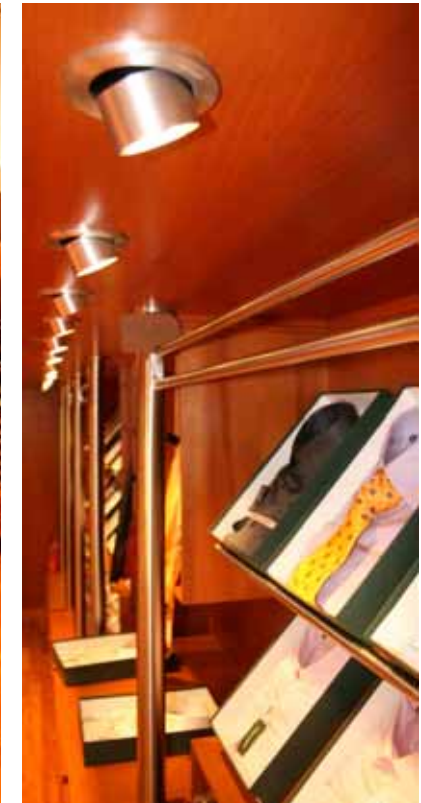
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- From:
  - Halogen Lamp with Luminaire
  - Lamp is replaced when broken
- To:
  - Luminaire with integrated SSL light source
  - Luminaire is replaced with refurbishment of shop / ~50.000 hours
  - Energy saving up to 65%



### Andrew's Ties, Peru

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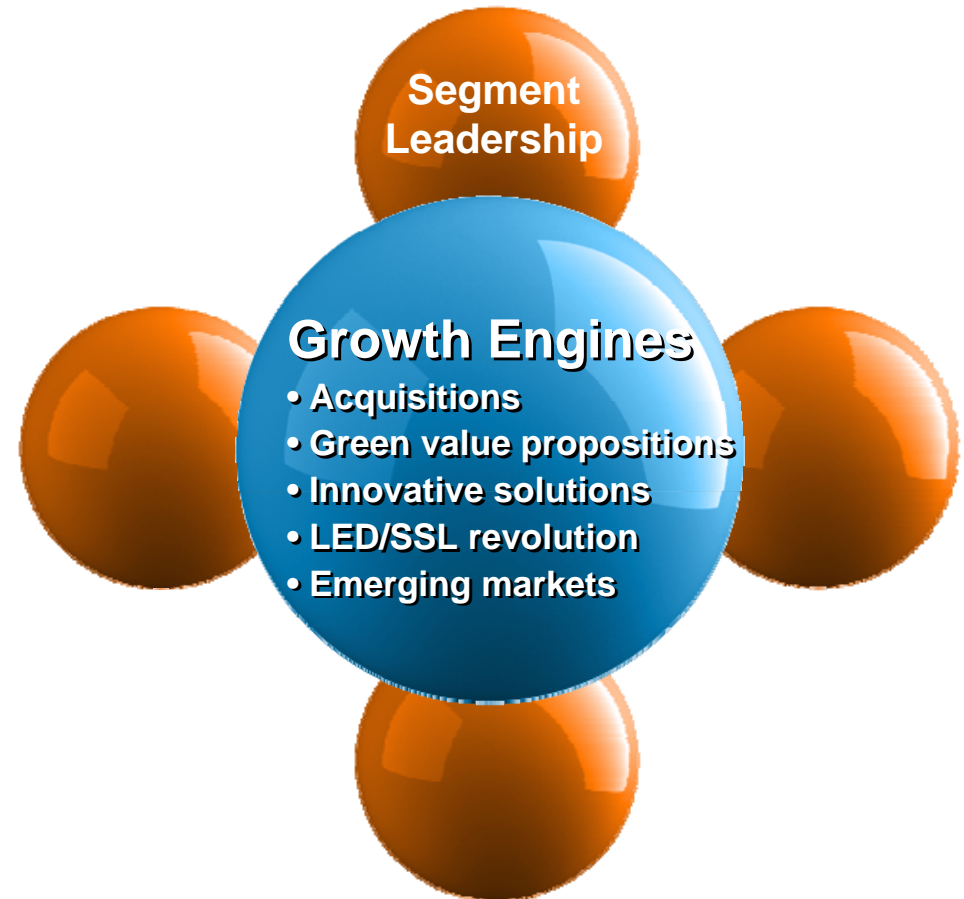
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- In Shape for the future

– **Segment leadership**

– **Growth Engines**

- Acquisitions
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- Emerging Markets





# Segment leadership with dedicated focus

Shops		Healthcare		Entertainment		Road	
Hospitality			Offices		Sports		
Industry			Homes		City Beautification		





## City beautification – improving urban life

### Segment Approach

- Experience city identity
- The city is about people
- Advanced Lighting Solutions



City

People

Light



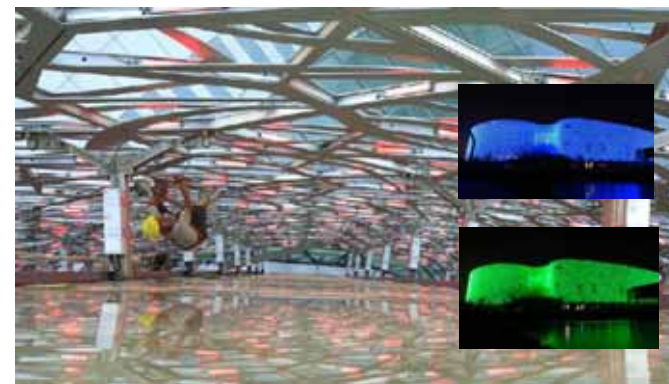
**Sustainable cities 2008**

### Solutions

- Takarazuka University of Art & Design; Osaka, Japan



- Science and Art Culture Centre Suzhou, China



## Road lighting – SSL entry makes road lighting greener



### SSL – Functional Lighting

- UrbanLine (Amsterdam, Netherlands)



- Leonis

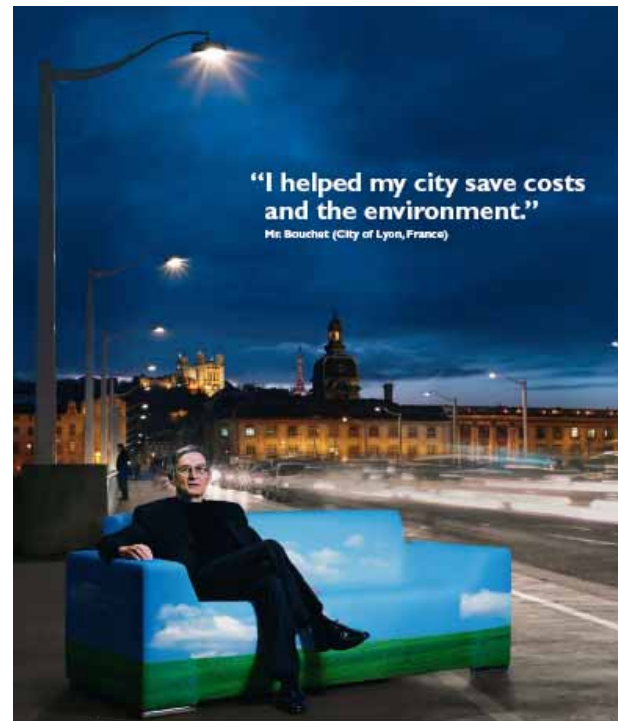


### Solutions

Green Solutions, saving costs

City of Lyon:

- Guillotière's bridge in Lyon
  - Philips CitySoul luminaires + CosmoPolis
- ▶ 50% energy reduction

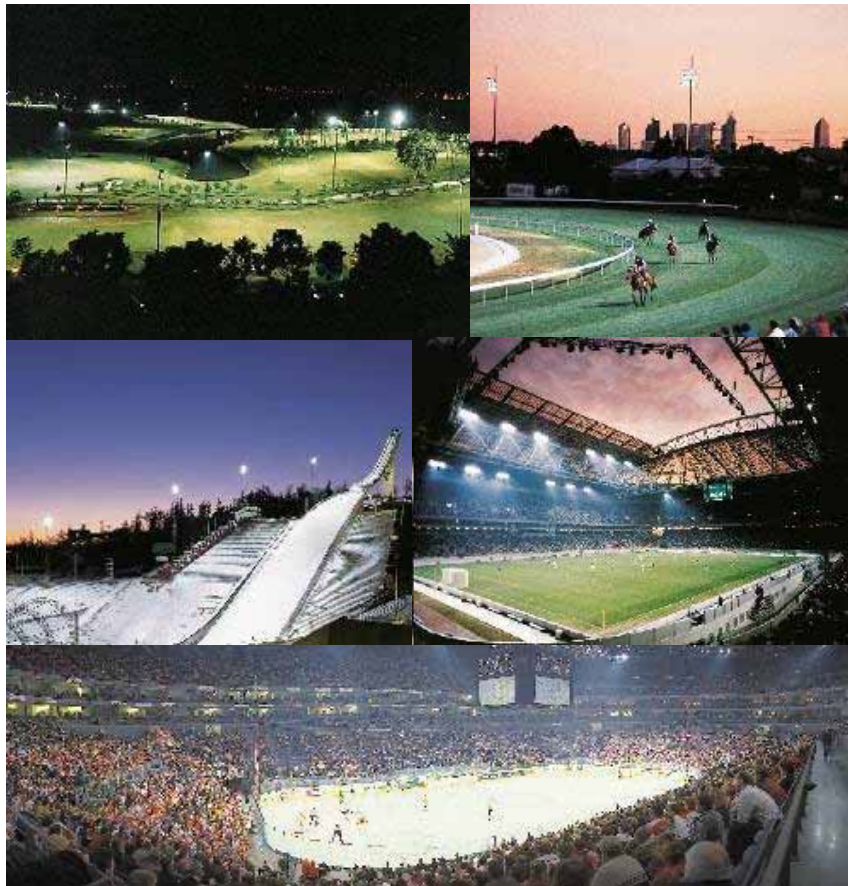




# Sports – expanding market opportunities

## Global Leadership

- Strong leadership in Sports Lighting  
Any event, Any sport, Any continent



## Solutions

2008 Formula 1  
First grand prix **night** race in Singapore





## Healthcare – building on Philips' strength

### Segment Approach

- Ambience
- Wellbeing
- Sustainability



### Solutions

- Catharina Hospital, Eindhoven, NL  
Philips Ambient Experience in Cardiovascular room





## Offices - SSL entry makes offices greener

### Segment Approach

- Wellbeing (Feel good, work better!)
- Sustainability



### Solutions

- Generali, Paris, France  
1<sup>st</sup> LED OFFICE





## Industry – driving value with total Philips approach

### Segment Approach

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- Productivity
- Sustainability



### Smart-Bay is the First Intelligently Designed High Bay Fixture

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- Maximizes Lamp Life
- Minimizes Maintenance Costs
- Minimizes Environmental Impact
- Minimizes Energy Costs

### Solutions

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- Smart Lighting Solutions





## Home – saving energy in style

### Segment Approach

- Functional
- Scene setting
- Wellbeing (2010)



### Solutions

- Ecomoods  
Light that allows me to save in style



- Philips Ledino  
Light & fixture that accent your personal style



- Living Colors  
Color your world with light





# Entertainment - new opportunities through acquisition and innovation

## New to Philips

Powering Philips Network

- Global premium brands

**VARI\*Lite**



- World class products

- CMH (Cosmopolis) Lamp
  - 350 Watt Spot and Wash
  - 2 Year "Maintenance Free"
- High Powered LED engine
  - 16-18,000 Lumens
  - Full Color Mixing
  - "Hit of the Show"



## Solutions

- Sopot Festival 2008, Poland



- Beijing, China (Olympics, 2008)







## Hospitality – differentiation through scene setting with SSL

### Segment Approach



- Personalization
- Wellbeing
- Sustainability



### Solutions

- Heineken, Amsterdam, Netherlands



- NH Hoteles, Barbizon Palace



# Shops – improving customer experience



Ambiscene (film)



# Shops – improving customer experience

## Segment Approach

Ambiscene

Shoppers' motivations – “stopping power” and “flexible ambience creation



## Solutions

- Hilfiger Denim



- Bugatti Showroom, Düsseldorf, Germany



Client:  
Brinkmann  
Group

Architect:  
Jeroen van  
Alphen

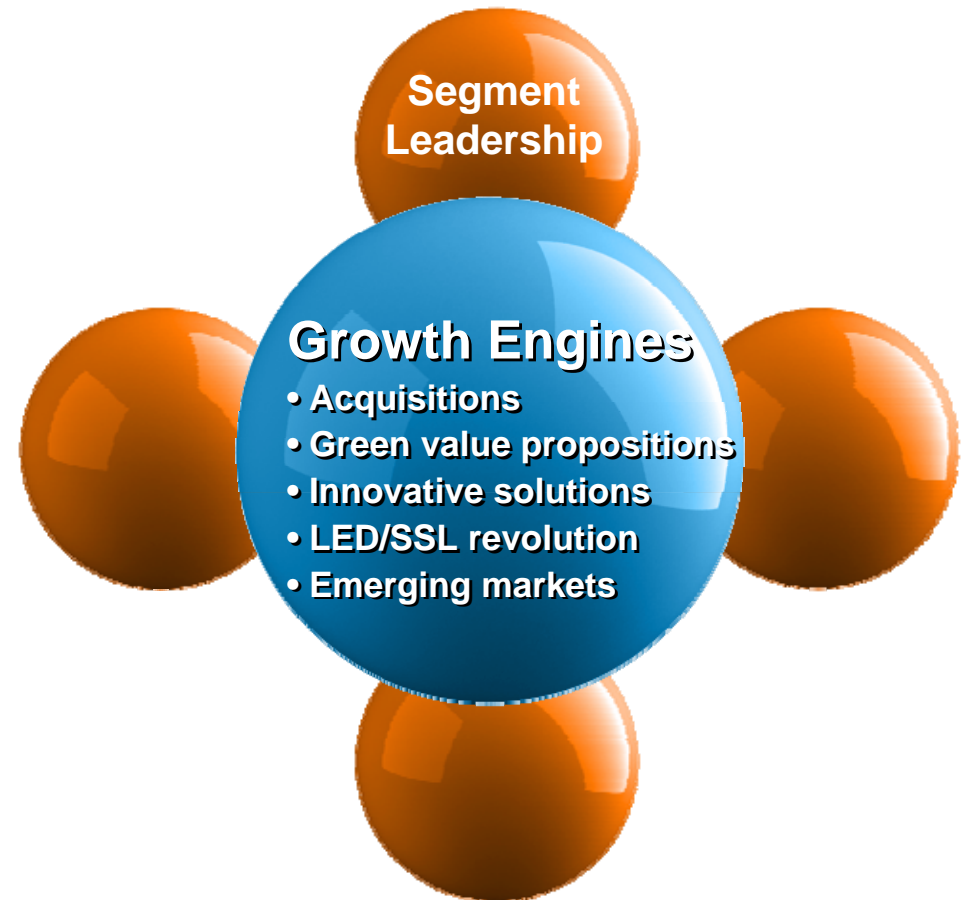
Lighting  
Solutions:Phil  
ips Lighting

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- **LED/SSL revolution**
- **Emerging Markets**





# Acquisitions - building a global organization

Philips is the only player with key positions around the world





# Global presence – leveraging Best Practice

## EU → US

- Roll out of Cosmopolis in North America



## US → EU

Strengthening EU Shop portfolio through Lightolier

Pedilight ▶

Vetro ▼



# Global partnerships



GAZELEY

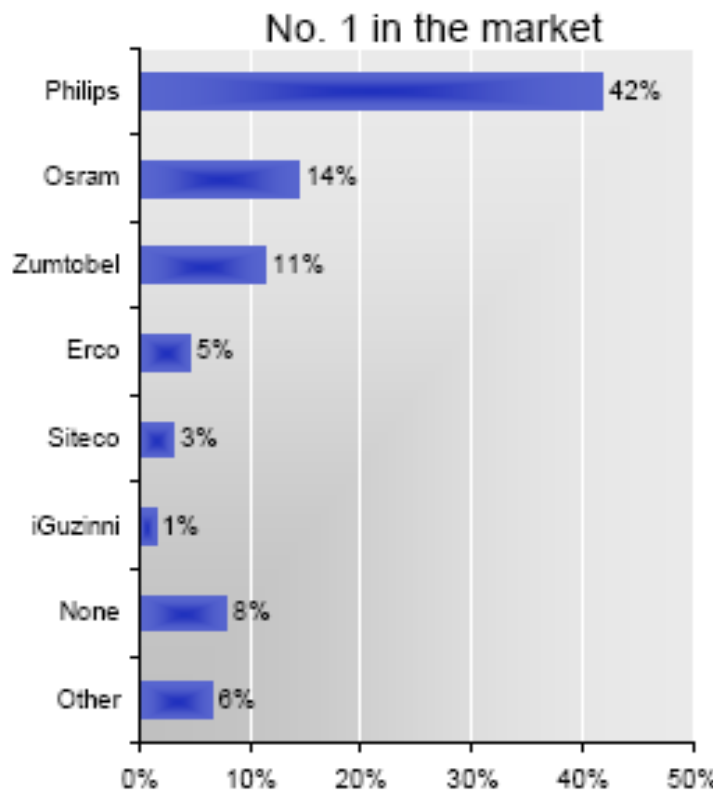


# Green – Philips is recognized as the clear industry leader



## Strength

- Philips is recognized as the clear leader in “energy efficient lighting solutions”\*



## Future Value creation

- Approximately **2/3** of all lighting currently installed in the European Union is based on older, less energy efficient technology



## Potential savings;

- 14 billion Euros in electricity **costs**/year
- 59 million tons of CO<sub>2</sub> emissions/year
- 196 million barrels of oil per year
- Output of more than 67 power plants

\* Light+Building 2008



## Green – driving new solutions to save cost and the environment



### Product

Smartform  
The new standard in office lighting



- Presence detection and daylight dependent dimming
- Installed power: **9 W/m<sup>2</sup>** ( $E_{av} = 510 \text{ lux}$ )
  - ▶ 25-50% energy saving
  - ▶ Adding controls: 30-50% extra savings

### Solution

Findomestic Bank, Milan, Italy

- Philips SmartForm TBS460 luminaires
- Philips MASTER TL5 lamps
  - ▶ 50% energy reduction



# Green – providing a sustainable choice



## Green Flagship



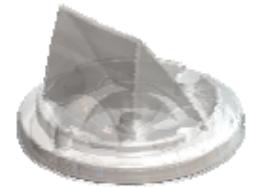
### Green Flagship

A green flagship product outperforms its competitors, its predecessors or a different product type in the same application in at least one of these key green focal areas and is at least equal in all the rest of these green focal areas.

-  Energy Efficiency
-  Hazardous Substances
-  Packaging
-  Lifetime Reliability
-  Recyclability
-  Weight



# Innovation - synergies through building platforms



LifeLED™

1 platform for Road lighting for multi Philips groups and regions

- LED system for functional outdoor
- 70.000 hours lifetime
- LED system can replace current HiD lightsource in existing fixture





## Innovation – breakthrough in office lighting

### Downlighter

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- LED Downlighter
- SSL from decorative to functional
- 38 Watt CFLni – 18 Watt SSL
- TCO Payback within 2 years
- Launch Q1 2009



### Daywave – office luminaire

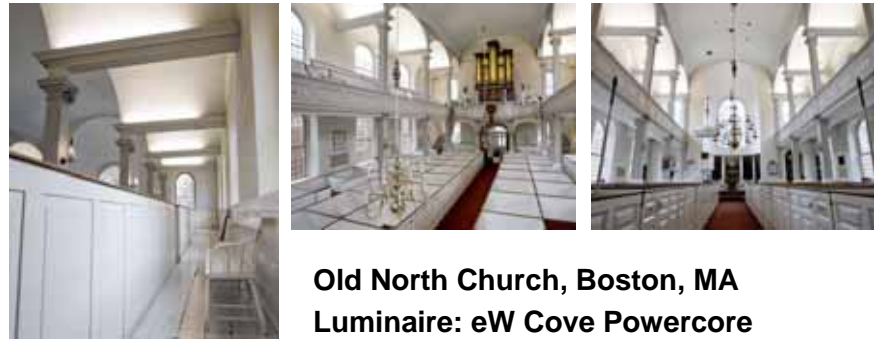
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- SSL Office Luminaire
- Presented at Light+Building
- Launch Q1 2009

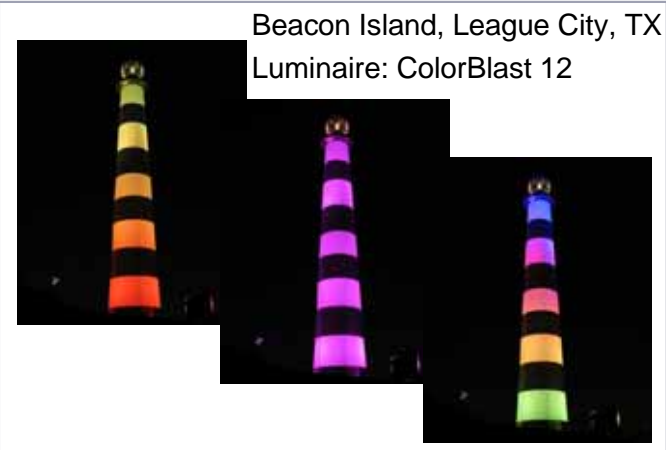




# LED/SSL – key benefits



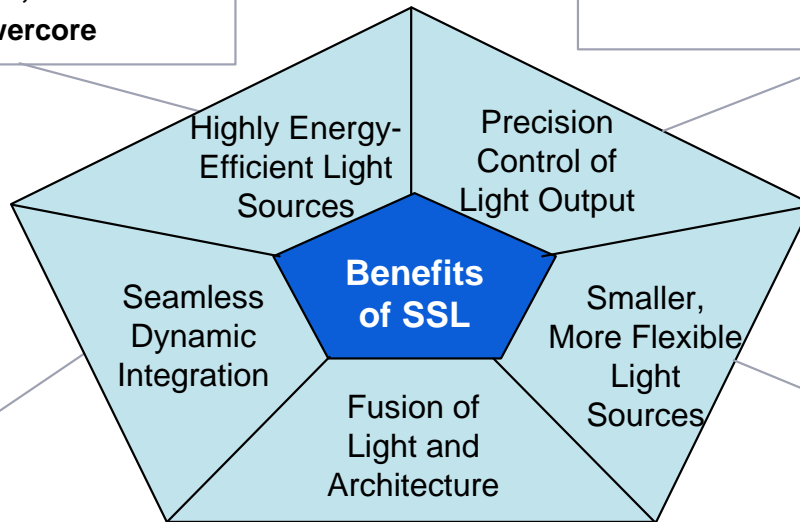
Old North Church, Boston, MA  
Luminaire: eW Cove Powercore



Beacon Island, League City, TX  
Luminaire: ColorBlast 12



Harrah's Casino, Atlantic City, NJ  
Luminaire: iColor Accent Powercore



Fire, Vauxhall, UK  
Luminaire:  
iColor Flex SL



The Pub, Stockholm Sweden  
Luminaire: iColor Cove MX Powercore

# LED/SSL - integrating Color Kinetics in Philips network





# LED/SSL – setting a new standard with ColorReach

## ColorReach will drive growth in outdoor market

- Replacing traditional light sources in large-scale illumination applications
- never before thought possible applications with LED-based light sources
- broadens specification opportunities



- 4,000 Lumen Output
- 1 foot-candle @ 400 feet



- Left: Four 1,600 W metal halide fixtures (6,400 W)
- Right: One WColorReach Powercore (300 W)



# LED/SSL - expanding from Color to White

## Color

## White

### Cove



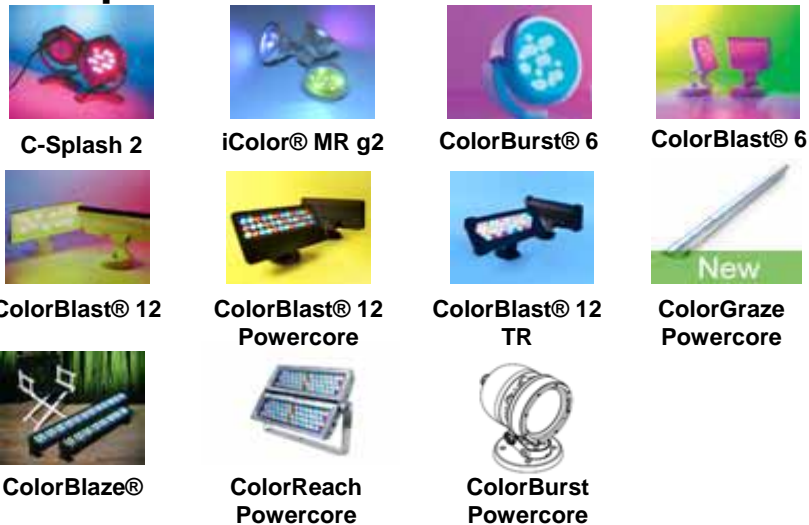
iColor Cove® EC iColor Cove QLX iColor Cove® MX Powercore

### Direct View



iColor® Module FX iColor® Tile FX 2:2 iColor® Flex SL iColor® Flex SLX iColor® Accent Powercore

### Flood/Spot/Wash/Graze



C-Splash 2 iColor® MR g2 ColorBurst® 6 ColorBlast® 6  
 ColorBlast® 12 ColorBlast® 12 Powercore ColorBlast® 12 TR ColorGraze Powercore  
 ColorBlaze® ColorReach Powercore ColorBurst Powercore

W2-08 W1-09

### IntelliWhite™



**New** iW Blast 12 Powercore iW Cove Powercore iW Profile g2



**New** iW Blast TR

### EssentialWhite™



**New** eW Burst Powercore eW Cove Powercore eW Flex SLX eW MR eW 38 W1-09



**New** eW Blast Powercore eW Graze Powercore eW Profile Powercore eW Downlight SM Powercore





# Emerging Markets – high growth and high profile projects in Asia



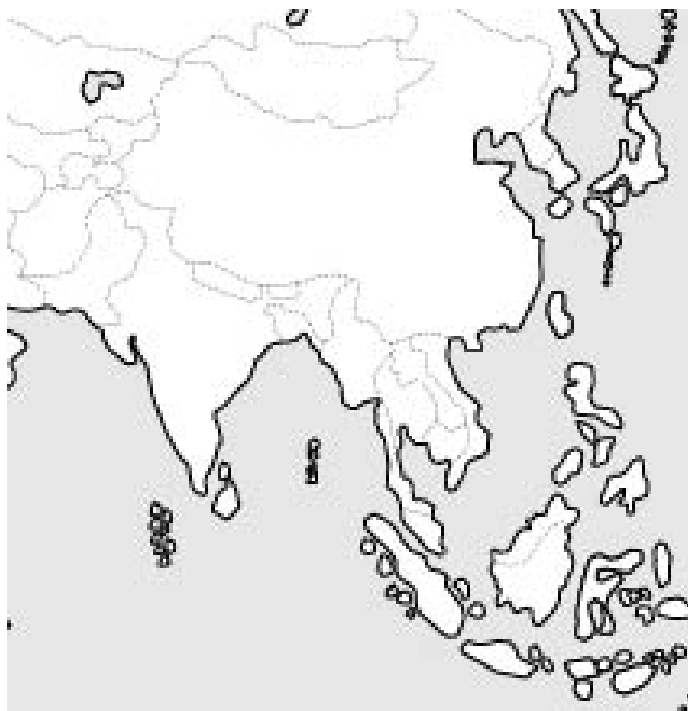
**Saifee Hospital, India**



**PSG College Bridge, India**



**Somerset Westlake, Hanoi, Vietnam**



**Pearl River, China**



**Banqiao East Hansheng Road Overbridge, Taiwan**



**Malaysia Mybank Fortis, Malaysia**



**Tree of Shanghai, China**

# Emerging Markets – SSL leadership in Latam



**La Playa, Cancún, Mexico**



**Guanajuato City , Mexico**



**Plaza Vea, Trujillo, Peru**



**Laurao viduct, Brazil**



**San Francisco Solano Convent, Argentina**



**Estadio Joao Havelange “O Engenhao”, Brazil**



**Sala, Sao Paolo, Brazil**

# Philips Luminaires – in shape for the future

## Acquisitions



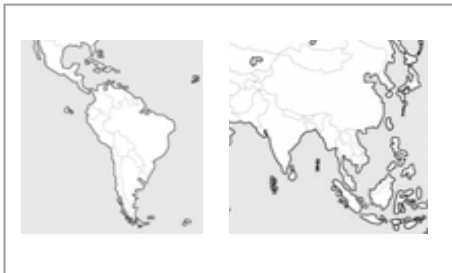
## Green Value Propositions

**Green Flagship**

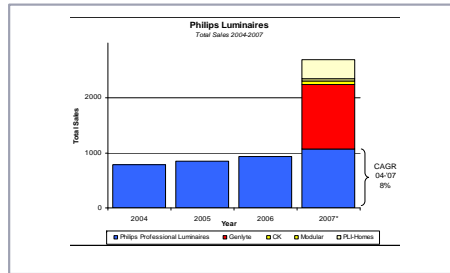
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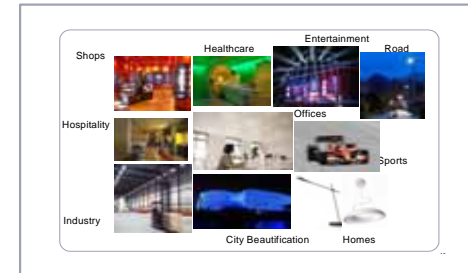
## Emerging Markets



## Luminaires In shape for the future



## Innovative Solutions



## LED/SSL Revolution

