

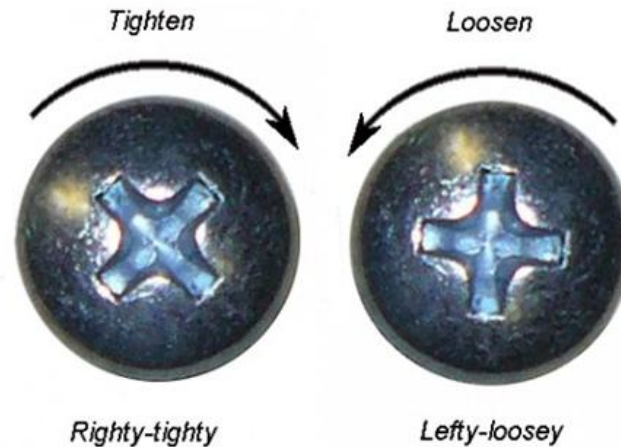


Lighting: Has the market transformed?

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Lighting

Installing energy efficient lighting is one of the most effective, sustainable design strategies available today



Market Transformation Definition



Is the strategic process of **intervening in a market to create lasting change in market behavior** by removing identified barriers or exploiting opportunities to accelerate the adoption of all cost-effective energy efficiency as a matter of standard practice



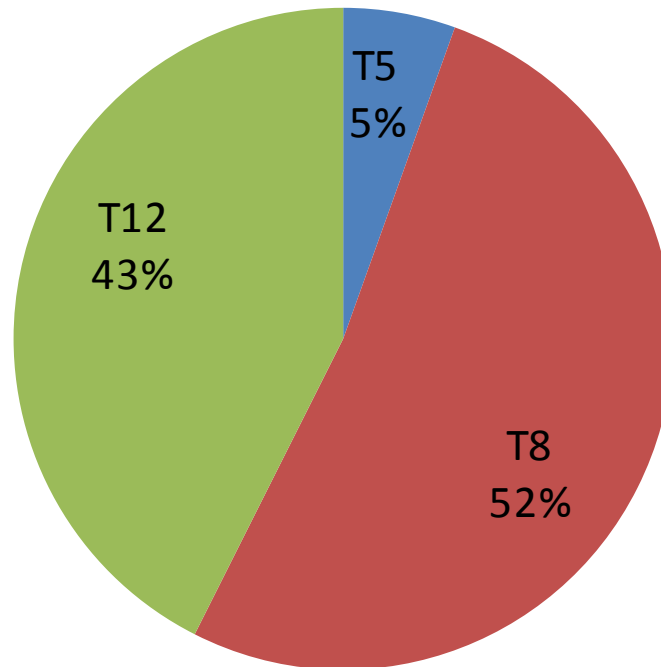
Through collaboration and pooling of resources, the region's utilities and stakeholders have harnessed their collective influence **to drive market adoption of energy efficiency products,** services and practices for the benefit of utilities, consumers and the region.

Forces driving market transformation

- Education
- Cost of new technology vs incumbent
 - LED vs Halogen lamps
- Confusion
 - EISA - Does not ban incandescent or any specific bulb type; they say that bulbs need to use about 25% less energy
- Regulations and legislation
 - EPACK
 - Energy Independence and Security Act
- Risk adverse
 - Objectives
 - Standards
 - DLC, CEE, CA CEC volunteer LEDr specification and Energy Star
 - CFLs learning curve

Example - T12 is 43% of INSTALLED US SOCKET BASE

Total Fluorescent Sockets in US



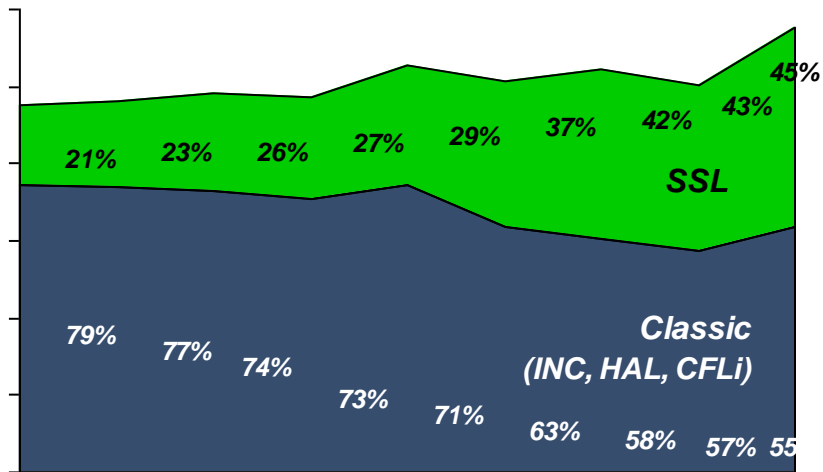
TOTAL US MARKET	
	Sockets
T5	121
T8	1,148
T12	941

**2.2 Billion
Sockets**

NEMA Lighting Results

Fixture

NEMA Fixture Dollars Market Trend

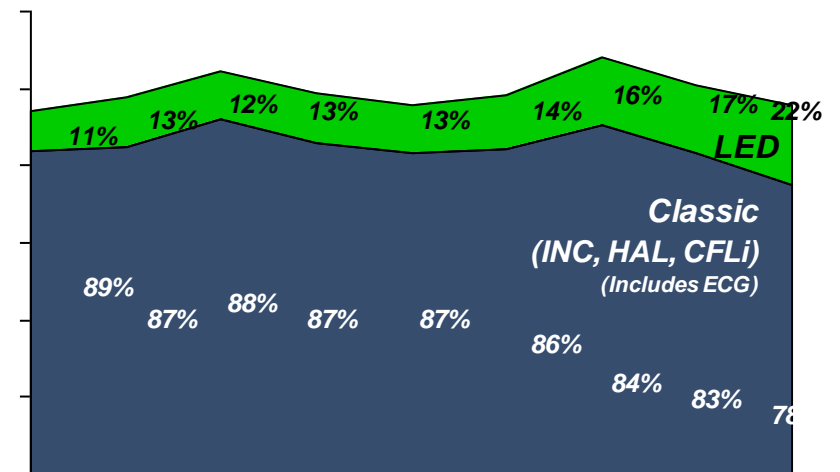


Jun-12 Sep-12 Dec-12 Mar-13 Jun-13 Sep-13 Dec-13 Mar-14 Jun-14

Quarter Ending

Lamp

NEMA Lamp Dollars Market Trend (Including ballast)



Jun-12 Sep-12 Dec-12 Mar-13 Jun-13 Sep-13 Dec-13 Mar-14 Jun-14

Quarter Ending

Breakout session

- Incentives driving new technology
 - When is the time to stop?
- Specifications – performance vs energy efficiency
 - DLC, CEE, CA CEC volunteer LEDr and Energy Star
- Mid stream programs
- Internet
- Controls