

# 2018 NON-RESIDENTIAL LIGHTING MARKET UPDATE

**Market Trends, Actors, and What We Anticipate  
for the Pacific Northwest**

Bonneville  
POWER ADMINISTRATION



# 3 MAIN ACTIVITIES

Sales Data  
Collection



Market Intel  
Gathering



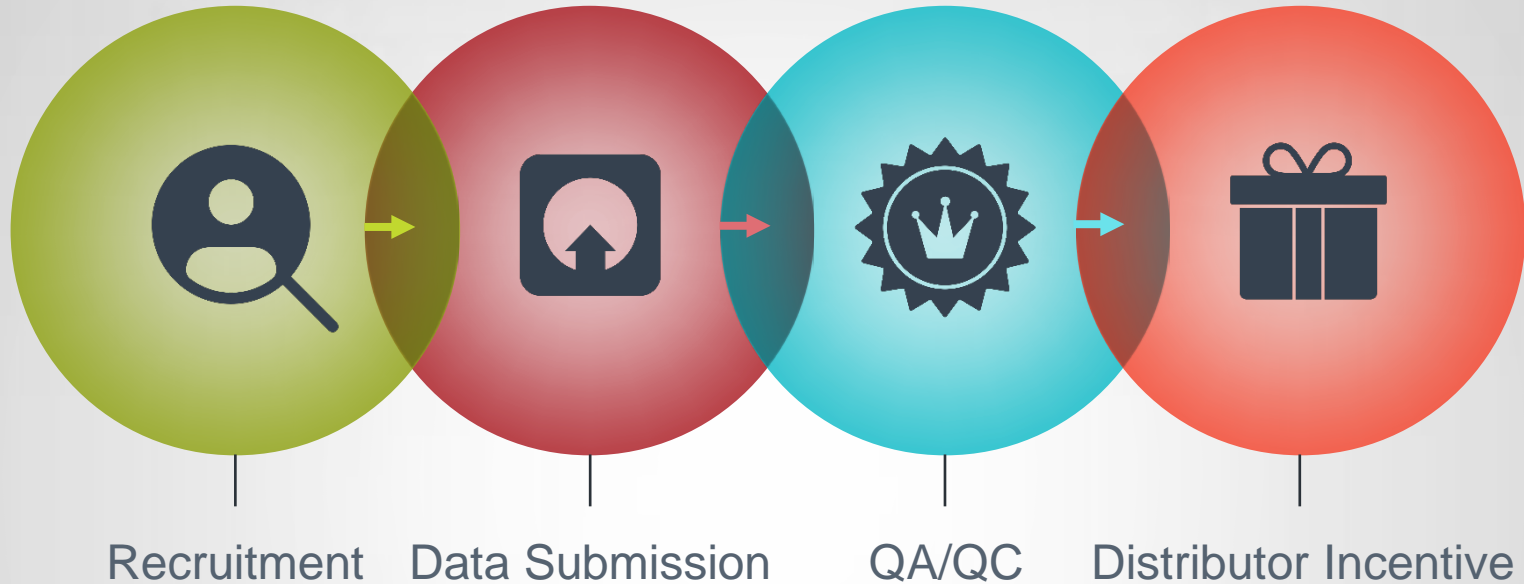
Market Modeling  
and Momentum Savings



# SALES DATA



# PROCESS FOR DISTRIBUTOR DATA SUBMISSION



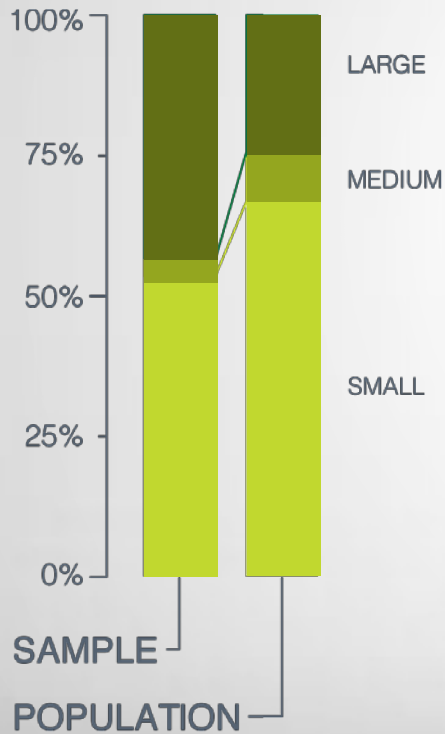
## DISPOSITION OF DISTRIBUTOR OUTREACH

TOTAL DISTRIBUTORS INCLUDED IN OUTREACH = 59

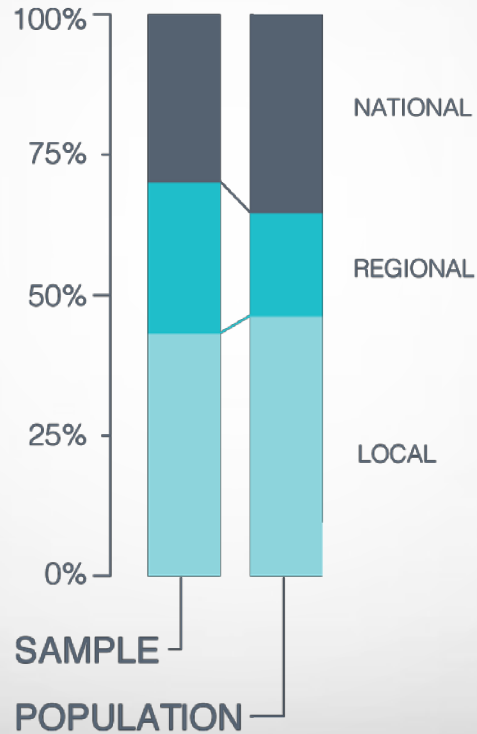


# MIX OF DISTRIBUTORS SUBMITTING DATA COMPARED TO PACIFIC NORTHWEST DISTRIBUTOR POPULATION

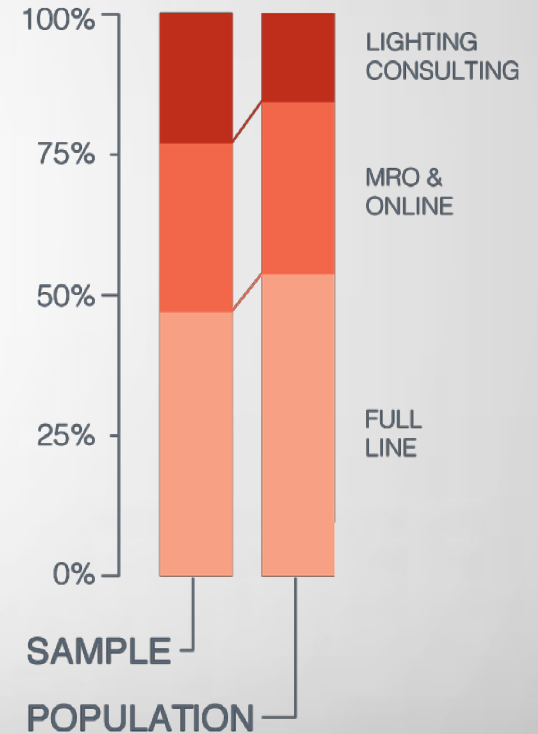
## Relative Size



## Distribution Area

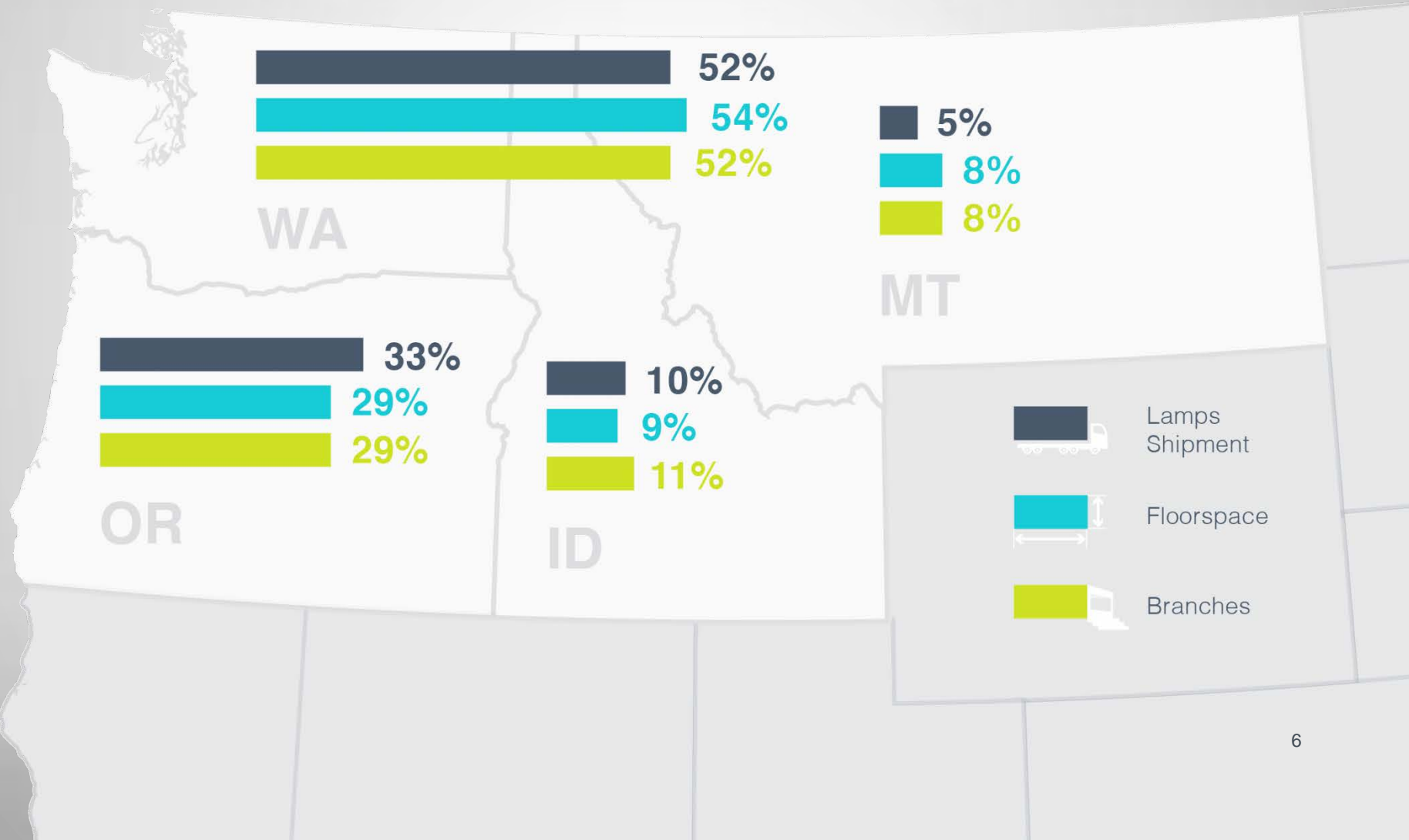


## Business Model



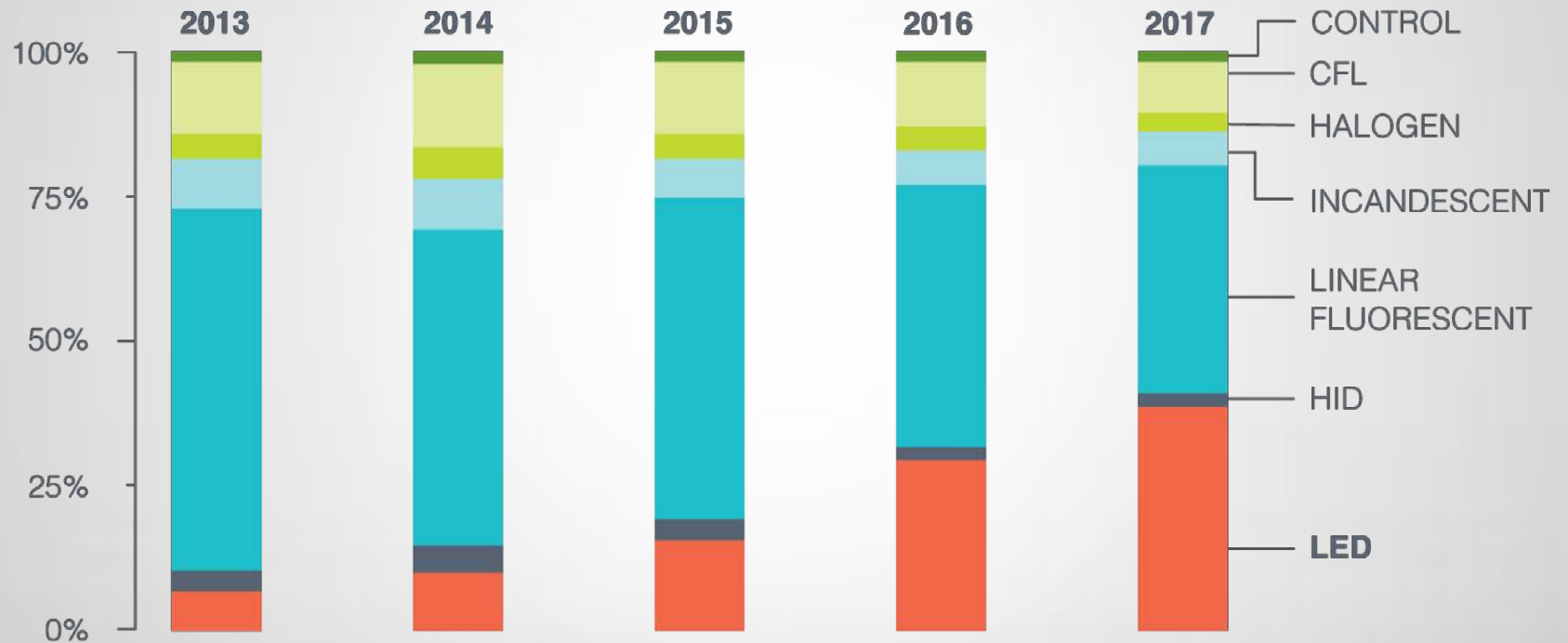
# DISTRIBUTOR LAMP SHIPMENTS

## Floor Space and Branches by State 2017

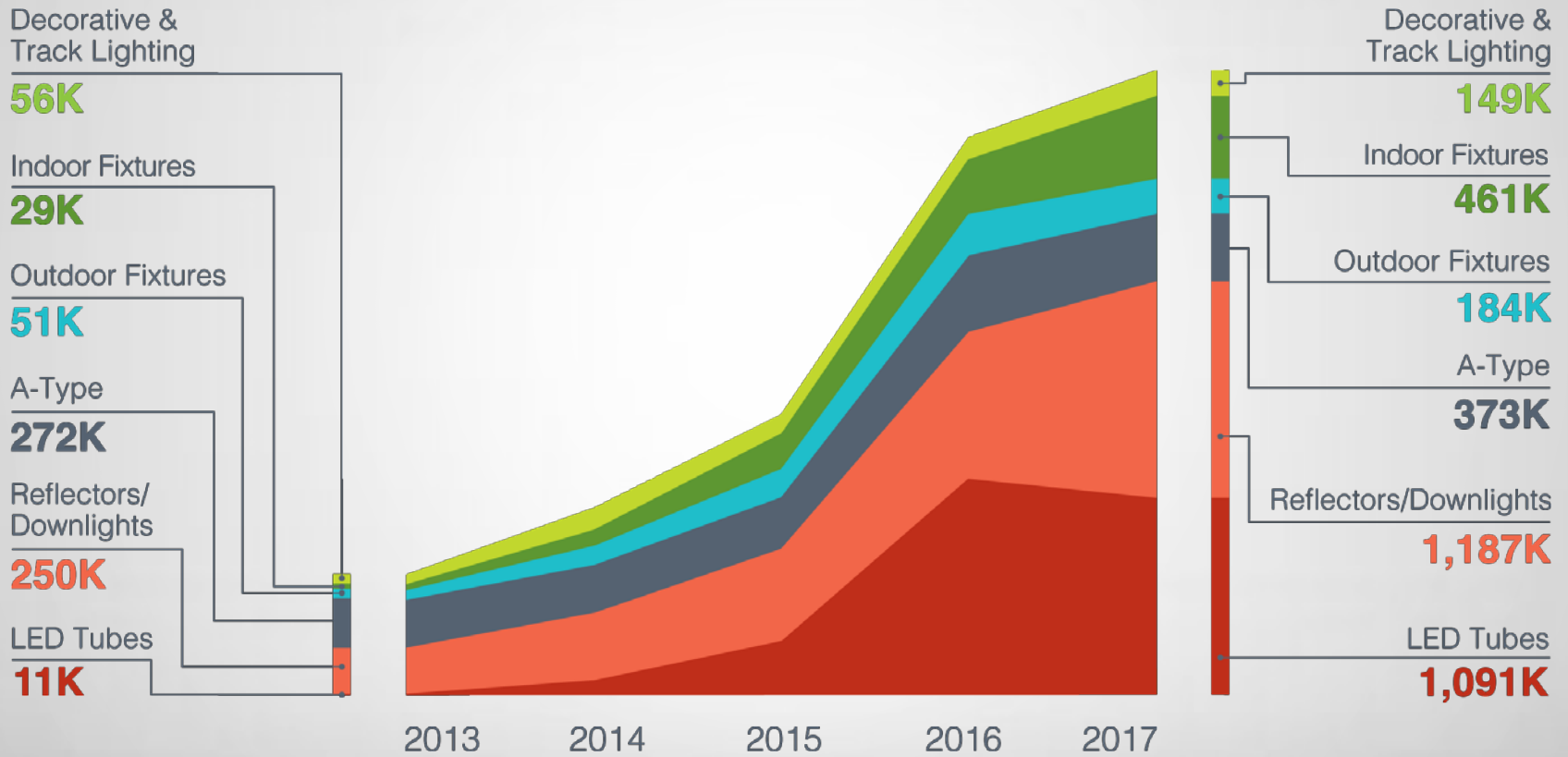


# PERCENT OF UNIT SALES

## by Technology Type 2013-2017

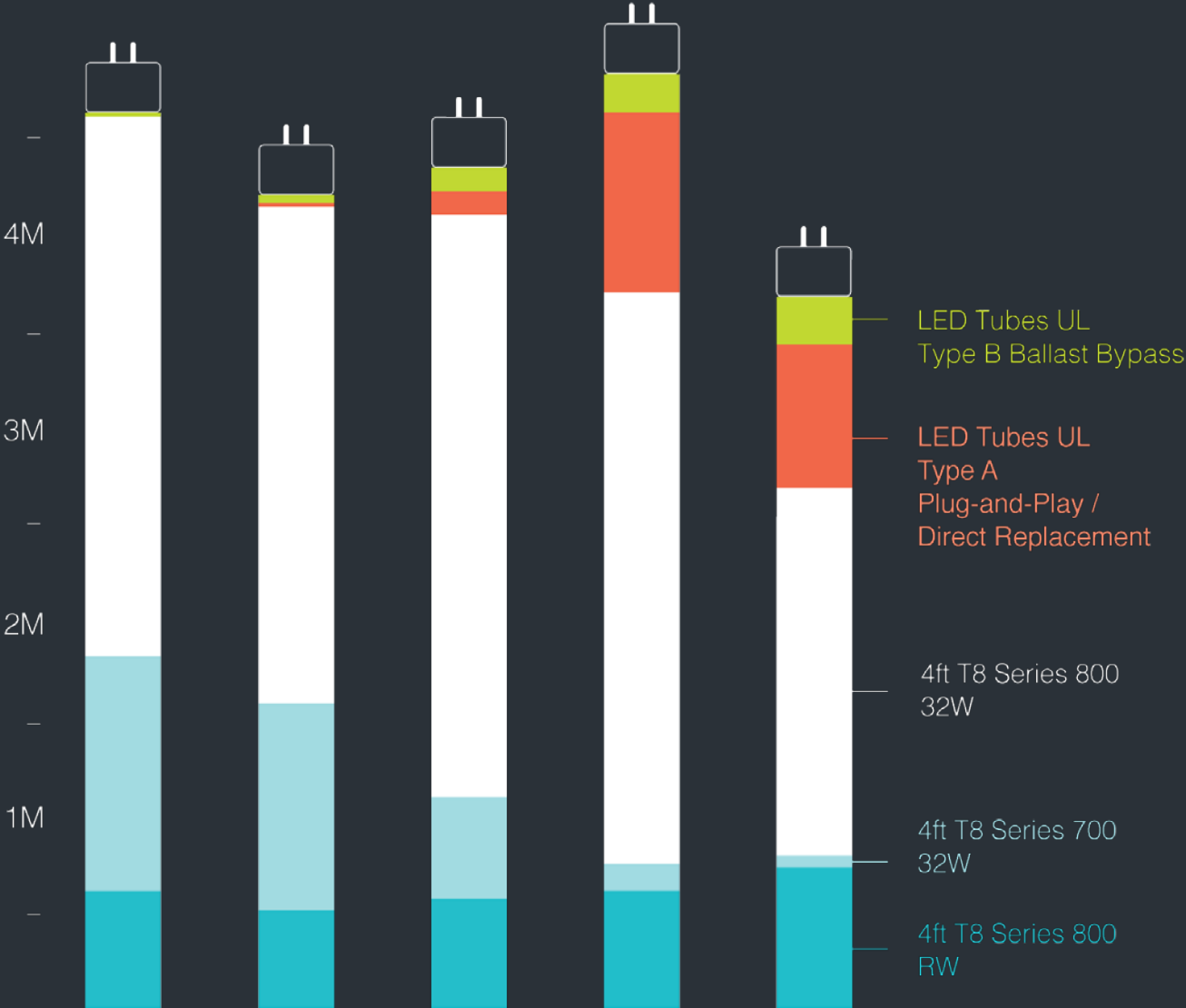


# LED LAMPS AND FIXTURES

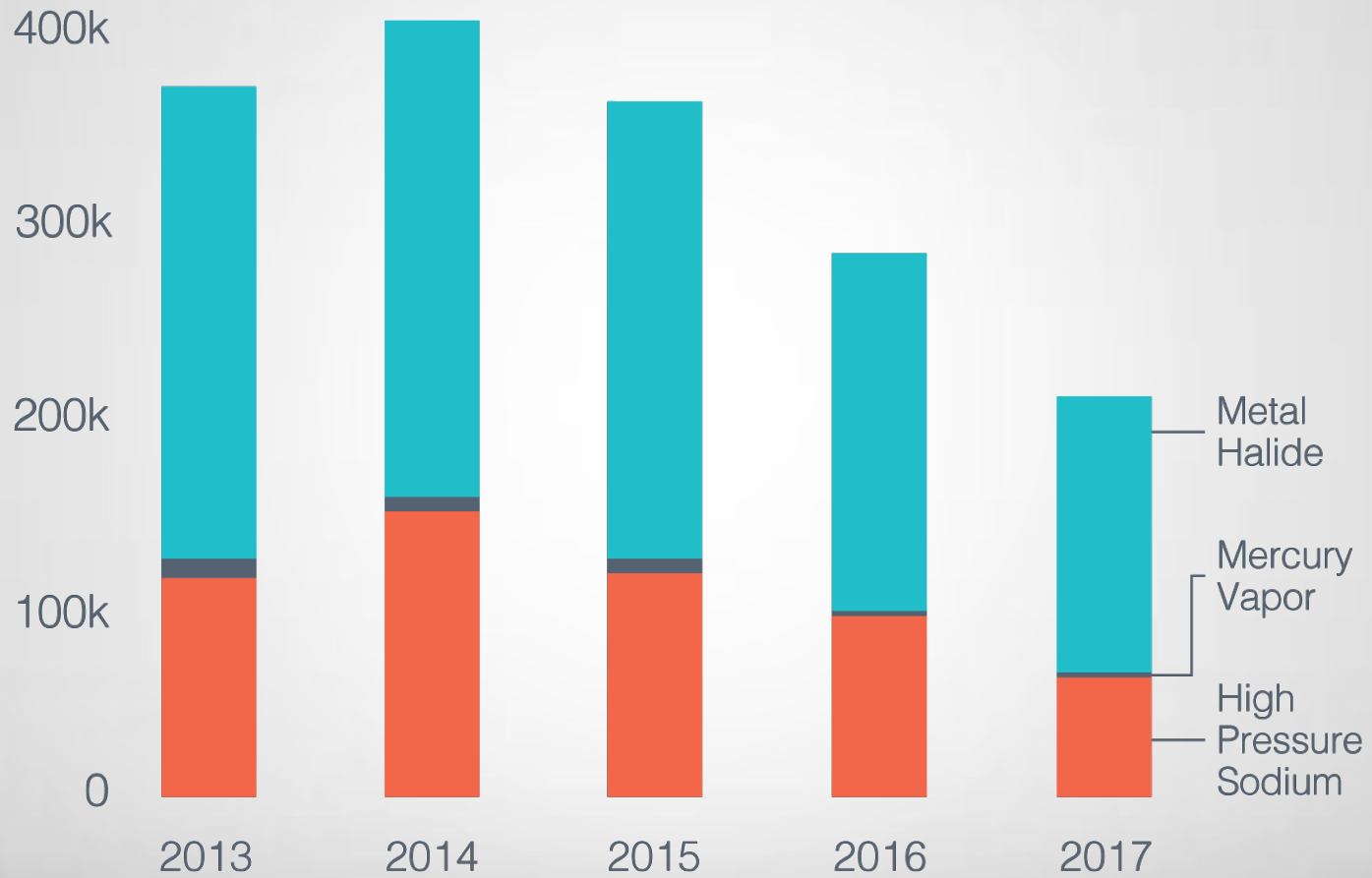




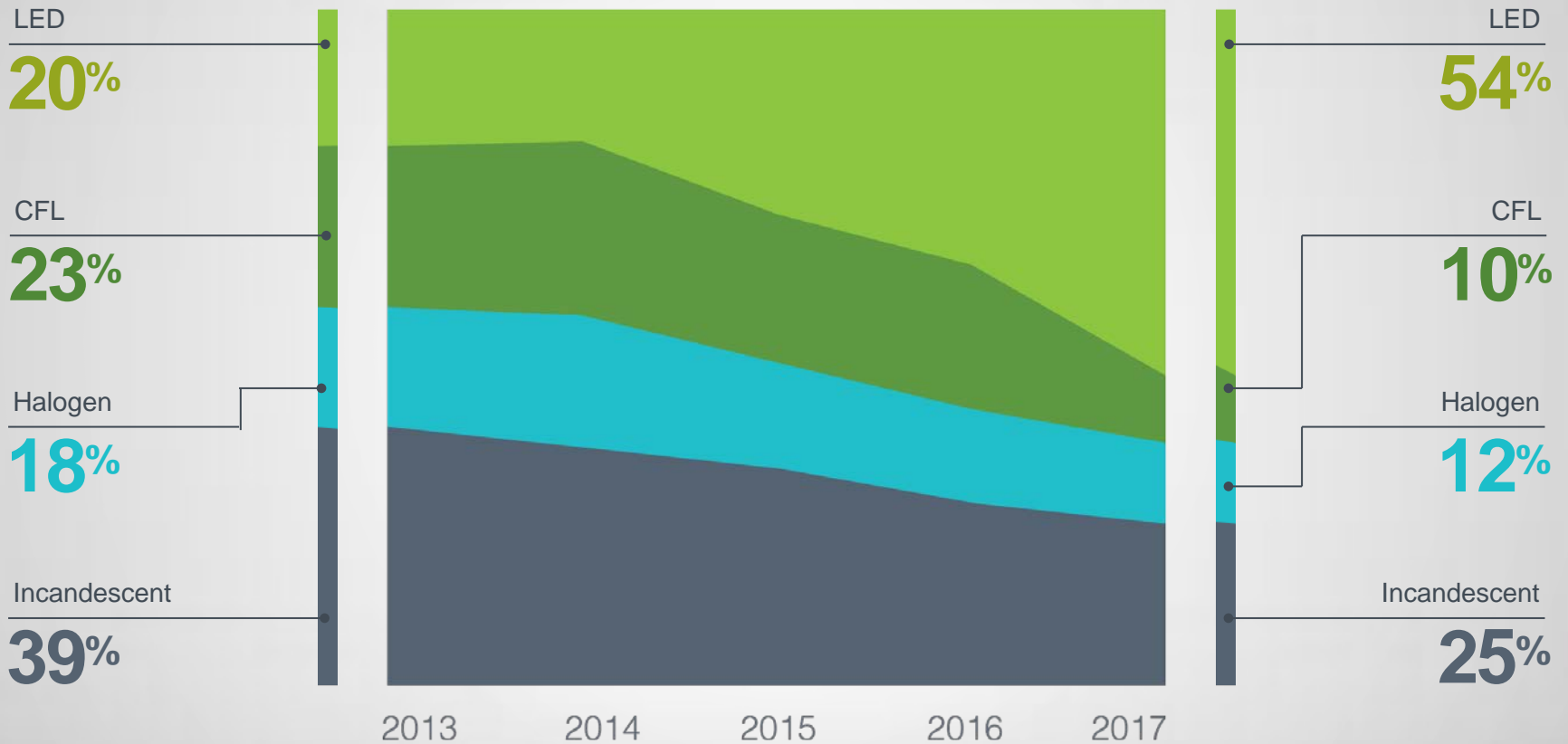
# LINEAR FLUORESCENT LAMPS AND TLEDS



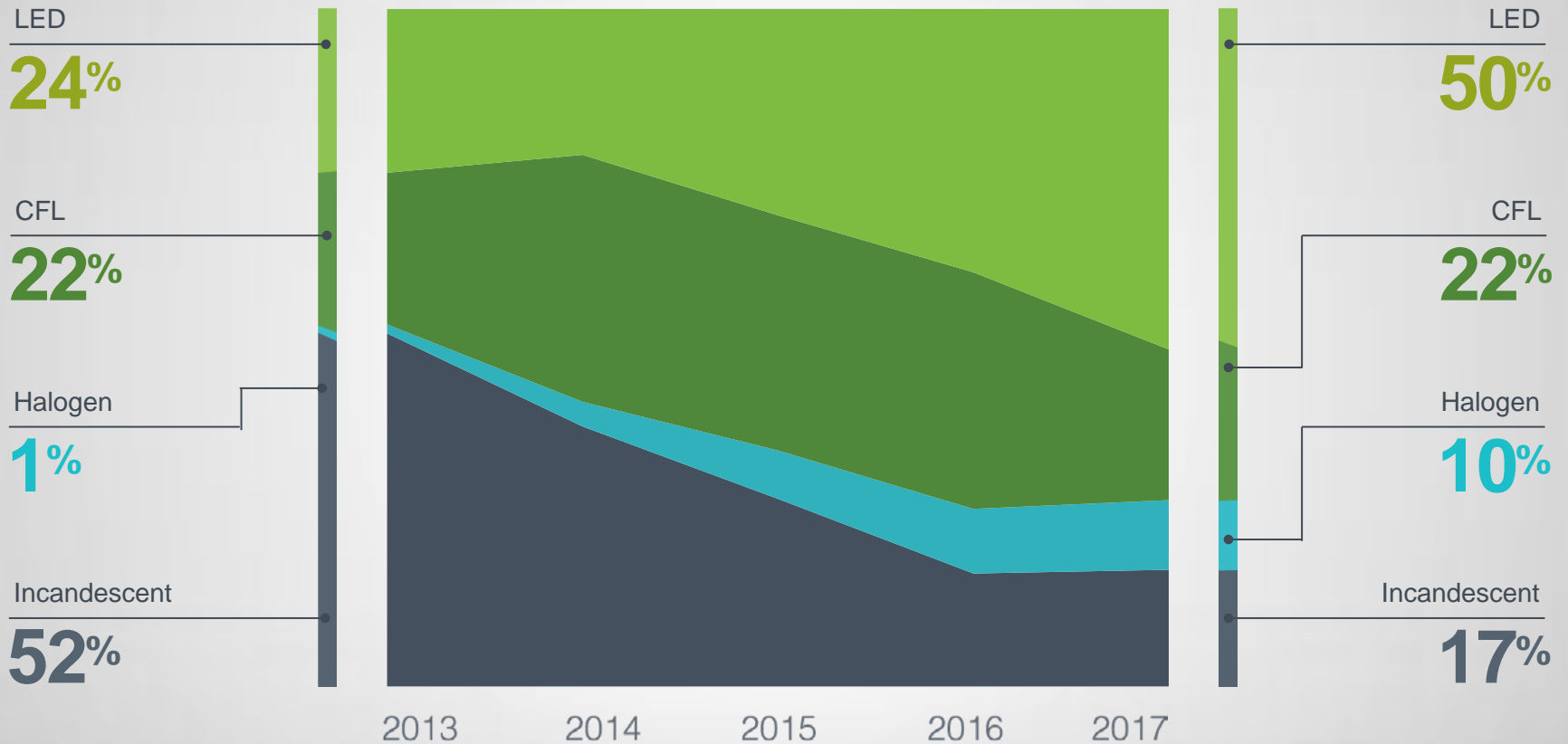
# HIGH INTENSITY DISCHARGE LAMPS



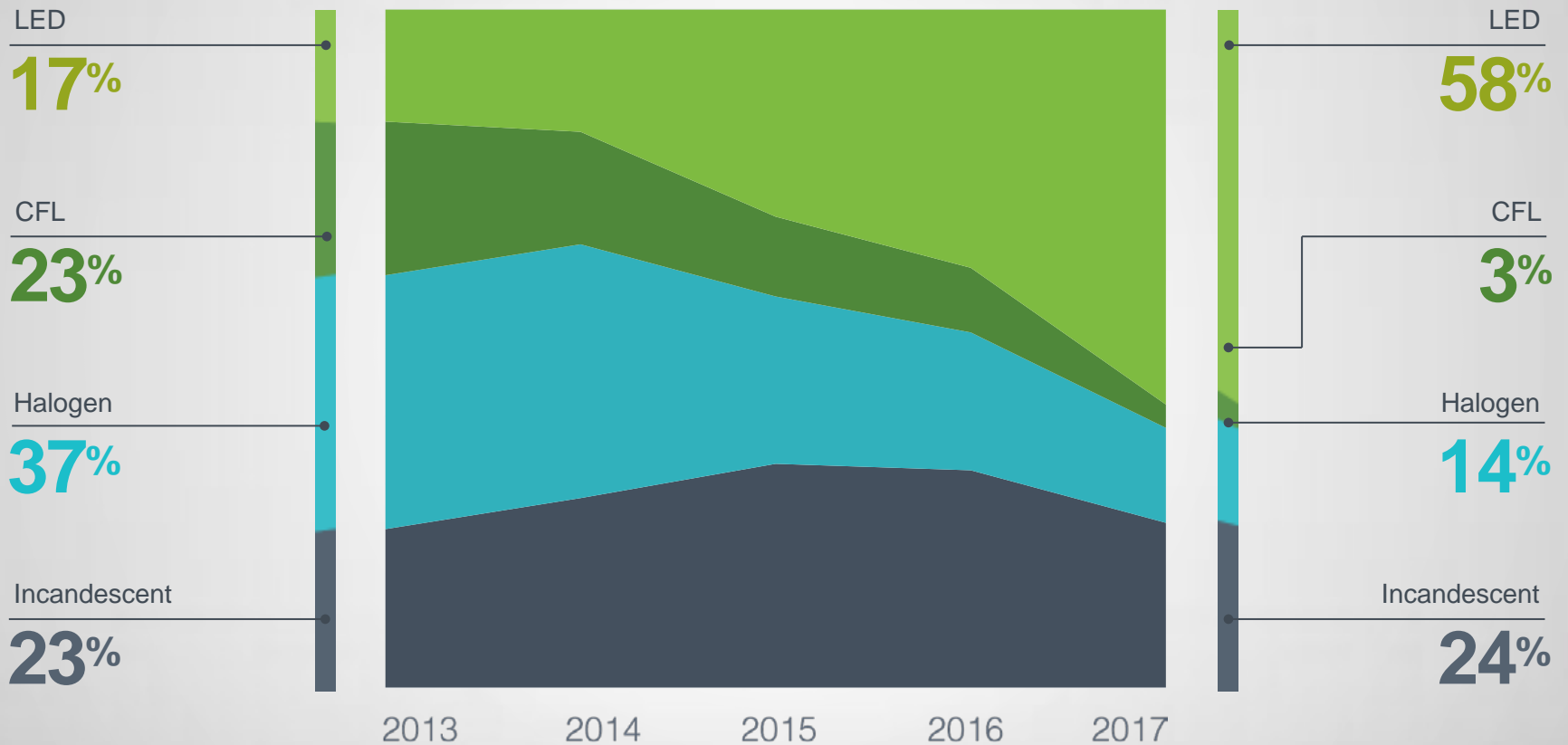
# SCREW-IN LAMPS



# LEDS ARE 50% OF A-TYPE LAMP SALES



# LEDS ARE NEARLY 60% OF SCREW-BASE REFLECTOR SALES



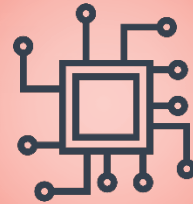
# LIGHTFAIR®



# WHY WE ATTENDED—IT'S A BIG DEAL



World's Largest  
Lighting Trade Show



Gain Insight  
Into Technologies

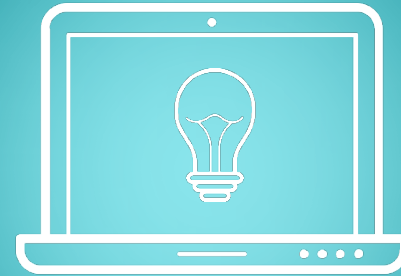


Talk with  
Manufacturers

# WHO WE TALKED TO



**25 Manufacturers**



**1 Online Retailer**

## **Range of Titles**

Marketing and Product Development Staff

Sales Reps

Engineering Managers

Product Managers



# LEDS



**Make up 50% to 100% of manufacturers' product lines**

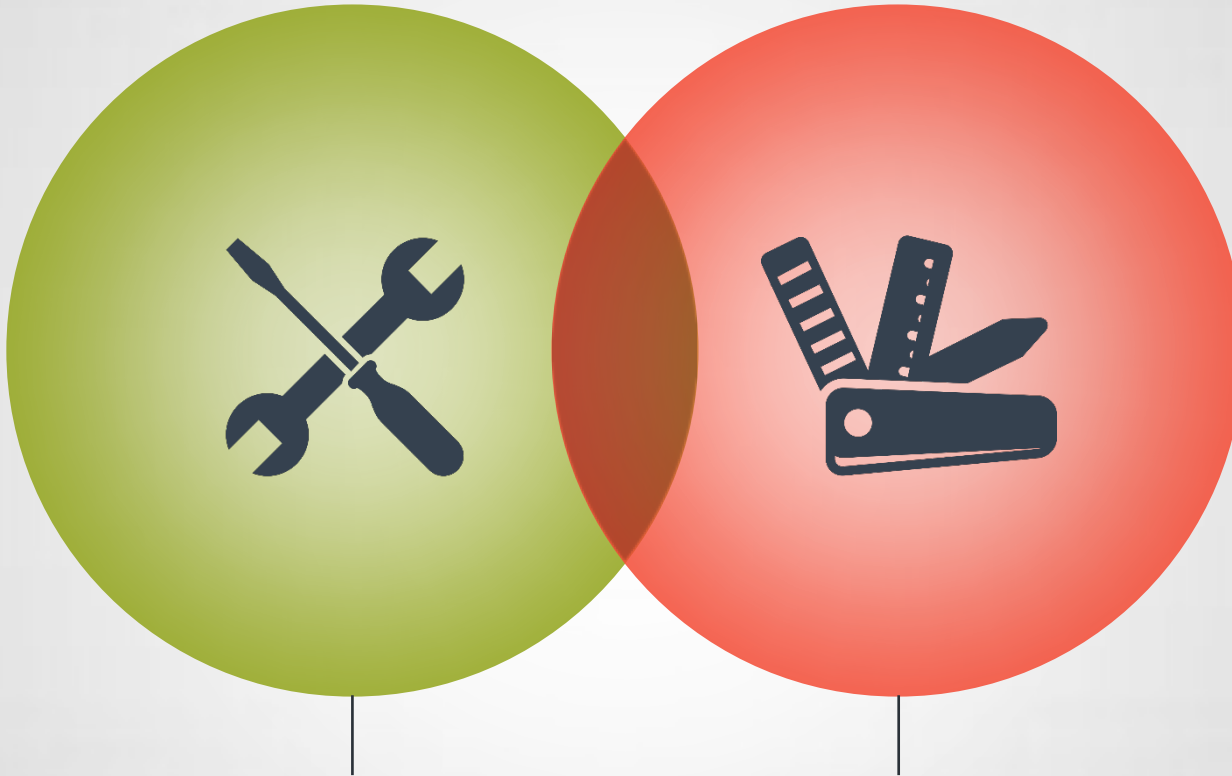


**Becoming a commodity**



**Close to their theoretical maximum efficiency**

# LUMINAIRES



Retrofit Kits  
Readily Available

Some Feature Customizable  
Lenses/Diffusers

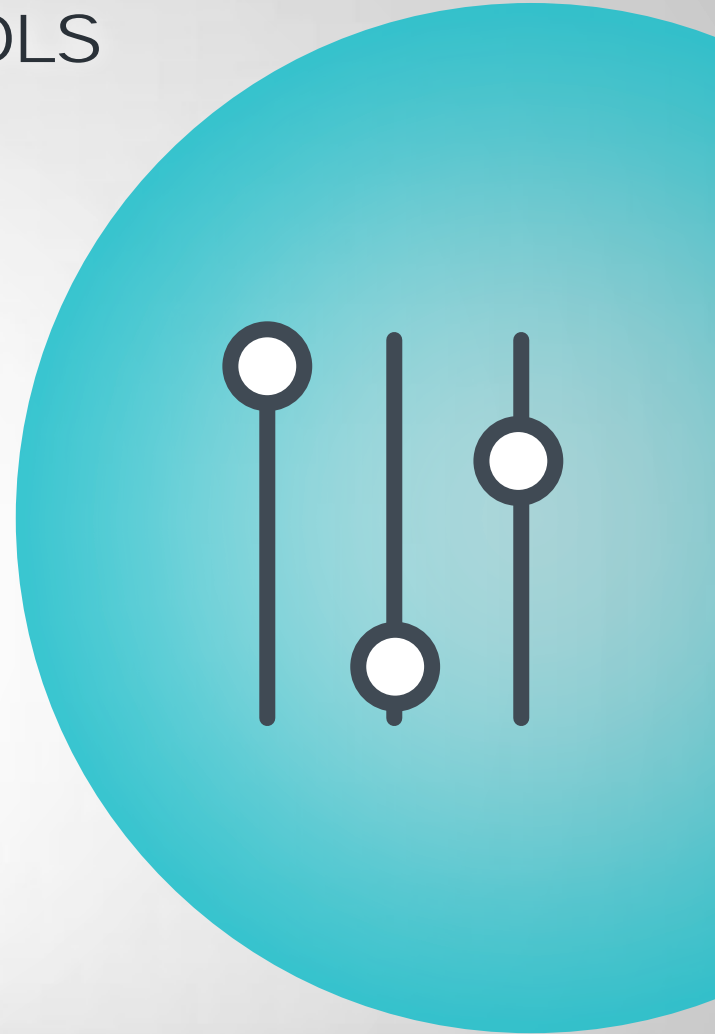
# ADVANCED LIGHTING CONTROLS

## **Widely featured at LF 2018:**

Manufacturers are focusing on controls as the “next frontier” now that LEDs have scaled up

## **Controls Trends:**

- Easy-to-install products
- Color tuning
- Luminaire-level lighting controls (LLLCs)
- Integrating non-lighting features
- No common protocols



# SUPPLY CHAINS

**Traditional supply chains still most common**  
**Wholesale distributors by far the largest channel**



# ROLE OF UTILITIES

## Mixed manufacturer opinions about the role of utility incentives



Helpful in getting to where we are  
Some think incentives are still  
critical to generating LED sales

Might be needed only where  
electricity rates are low  
Incentives are a “crutch”

# CONTACT

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# APPENDIX

# HOW IT FITS TOGETHER

