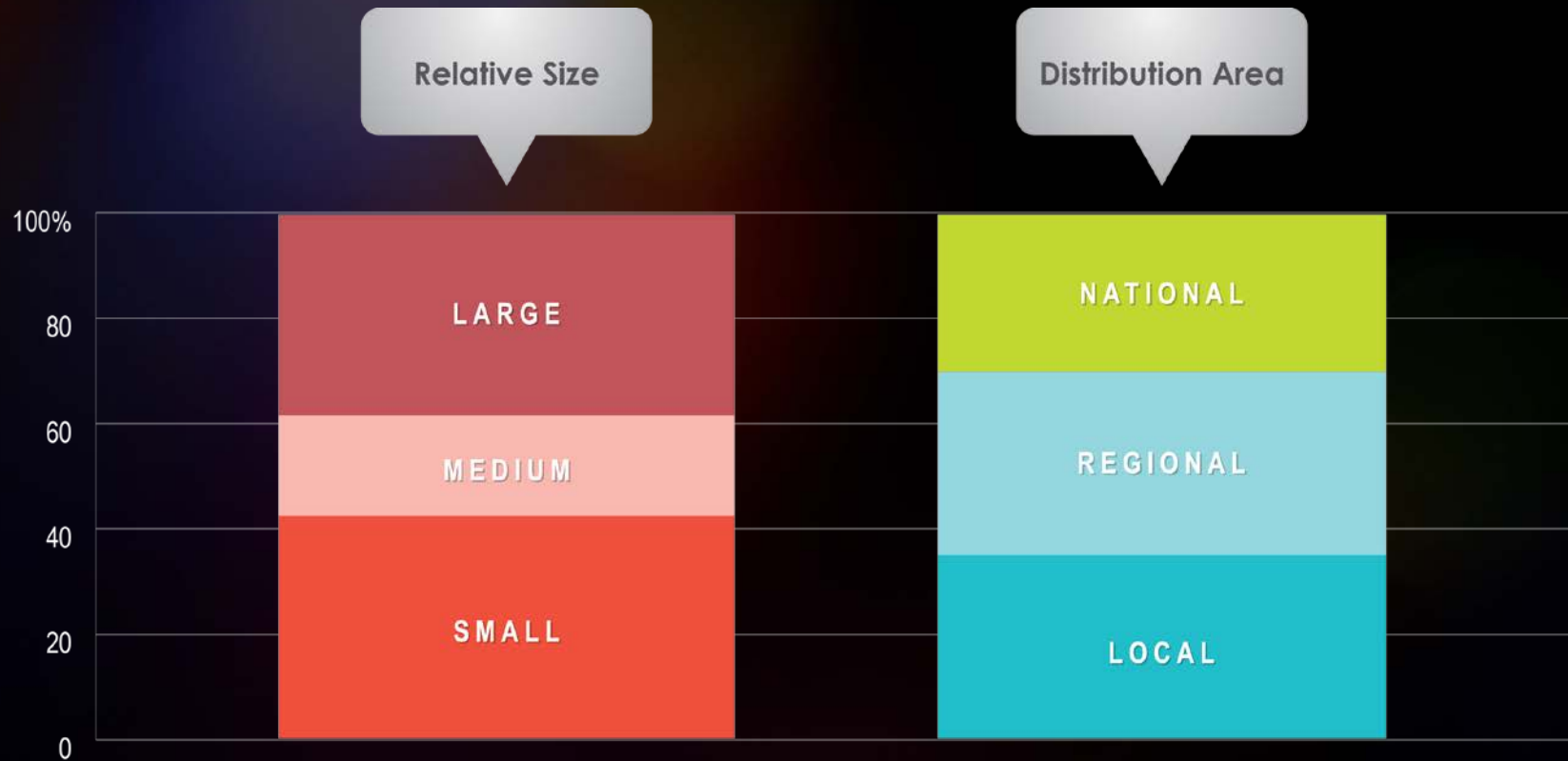


Northwest Non-Residential Lighting Sales 2015



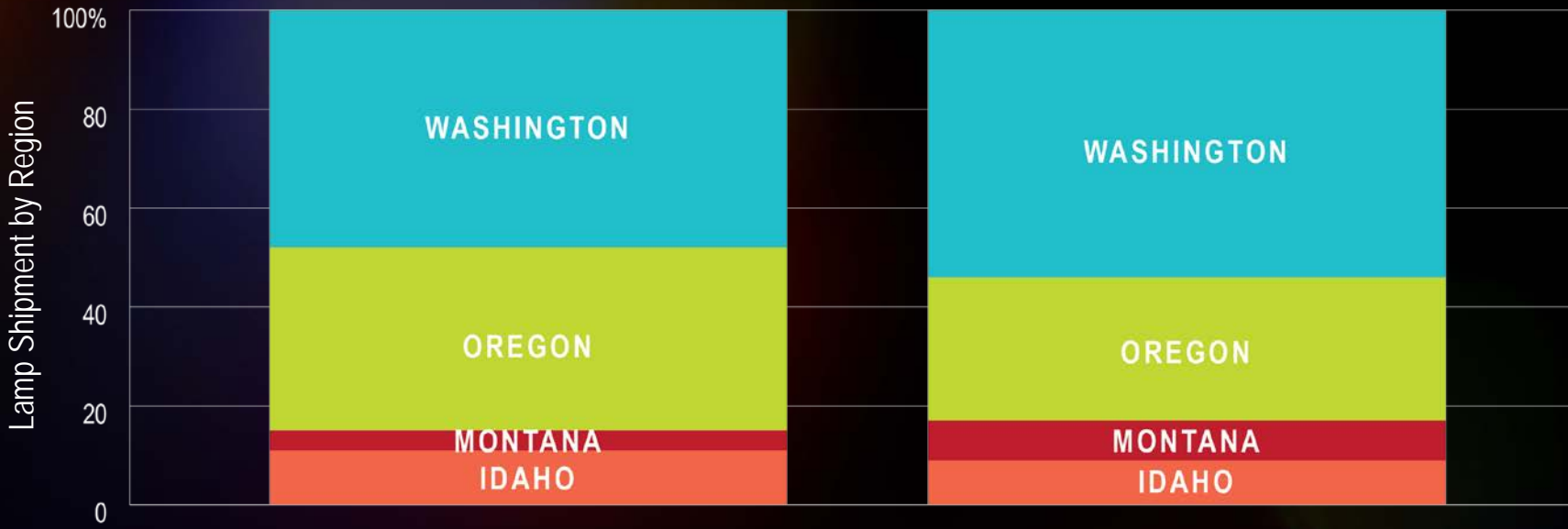
Data Collected from 34 Distributors



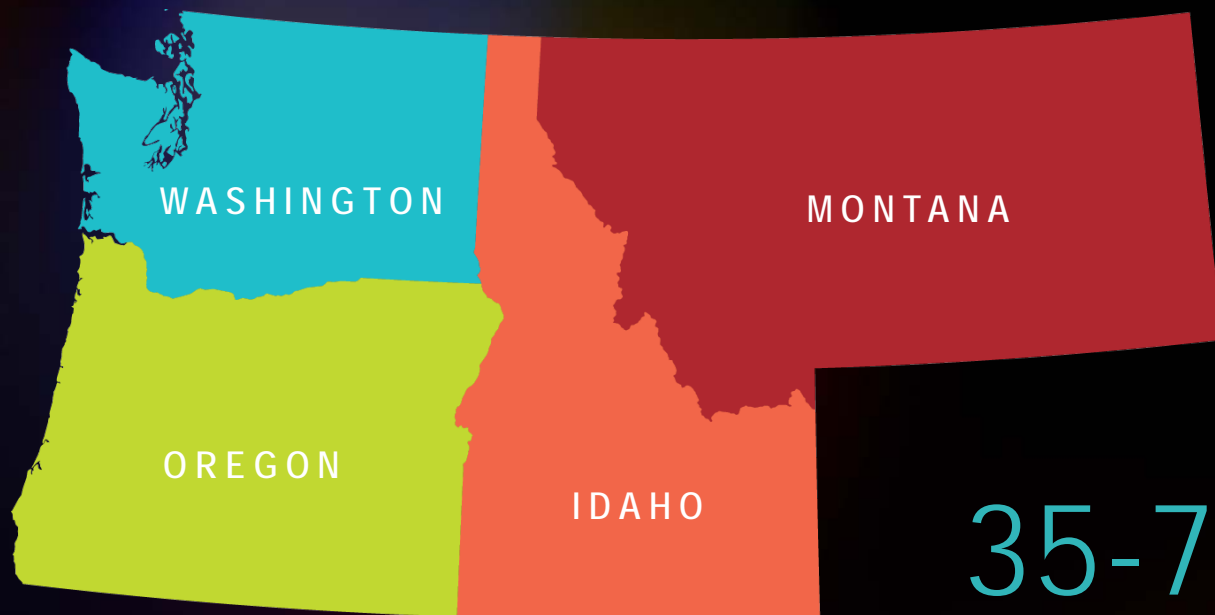


Our Data

Floor Space

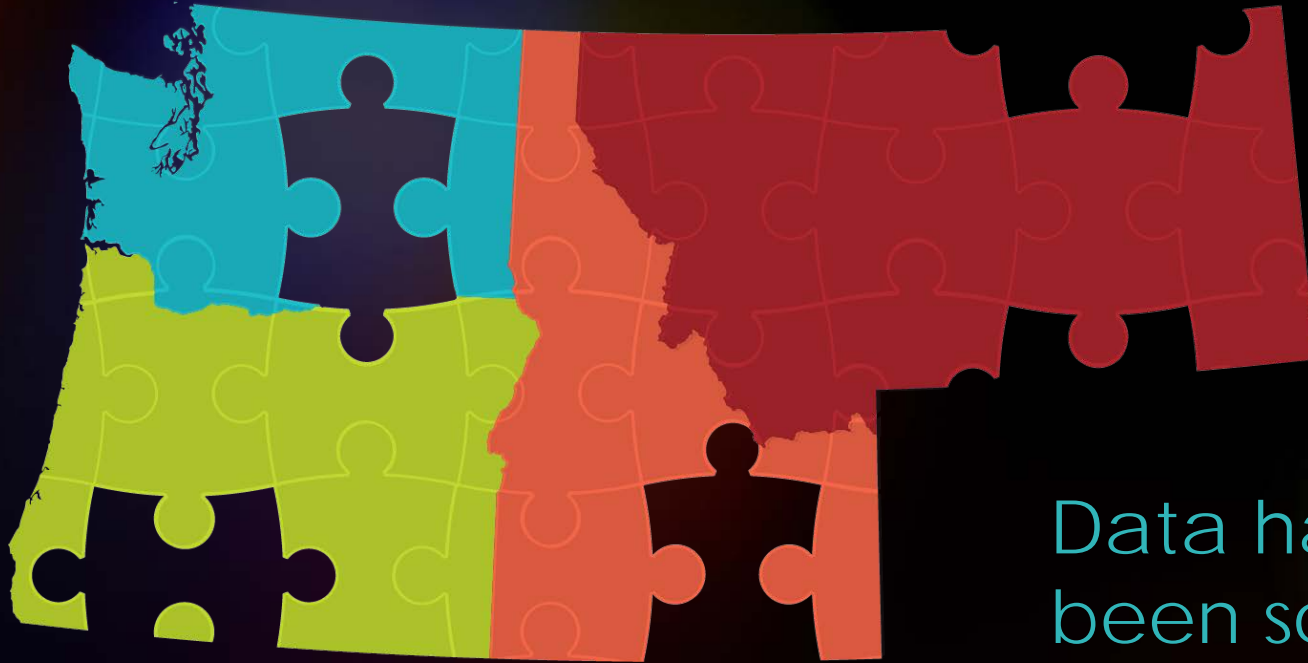


Balanced regional representation



35-70%

of the total market
represented

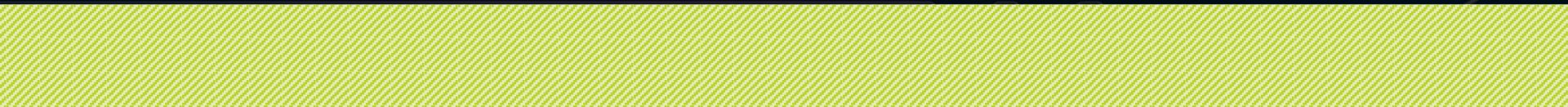


Data has not
been scaled up
to represent the
total market



SALES DATA FINDINGS

A MARKET IN FLUX

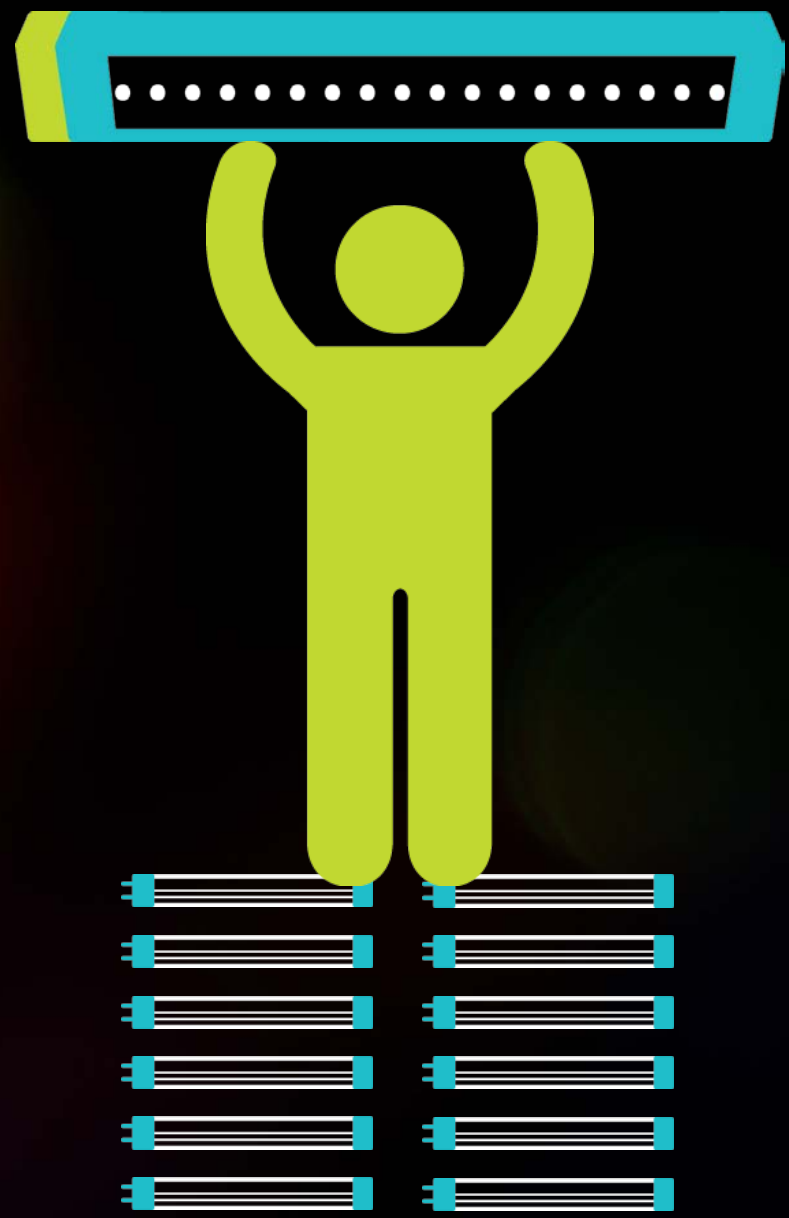




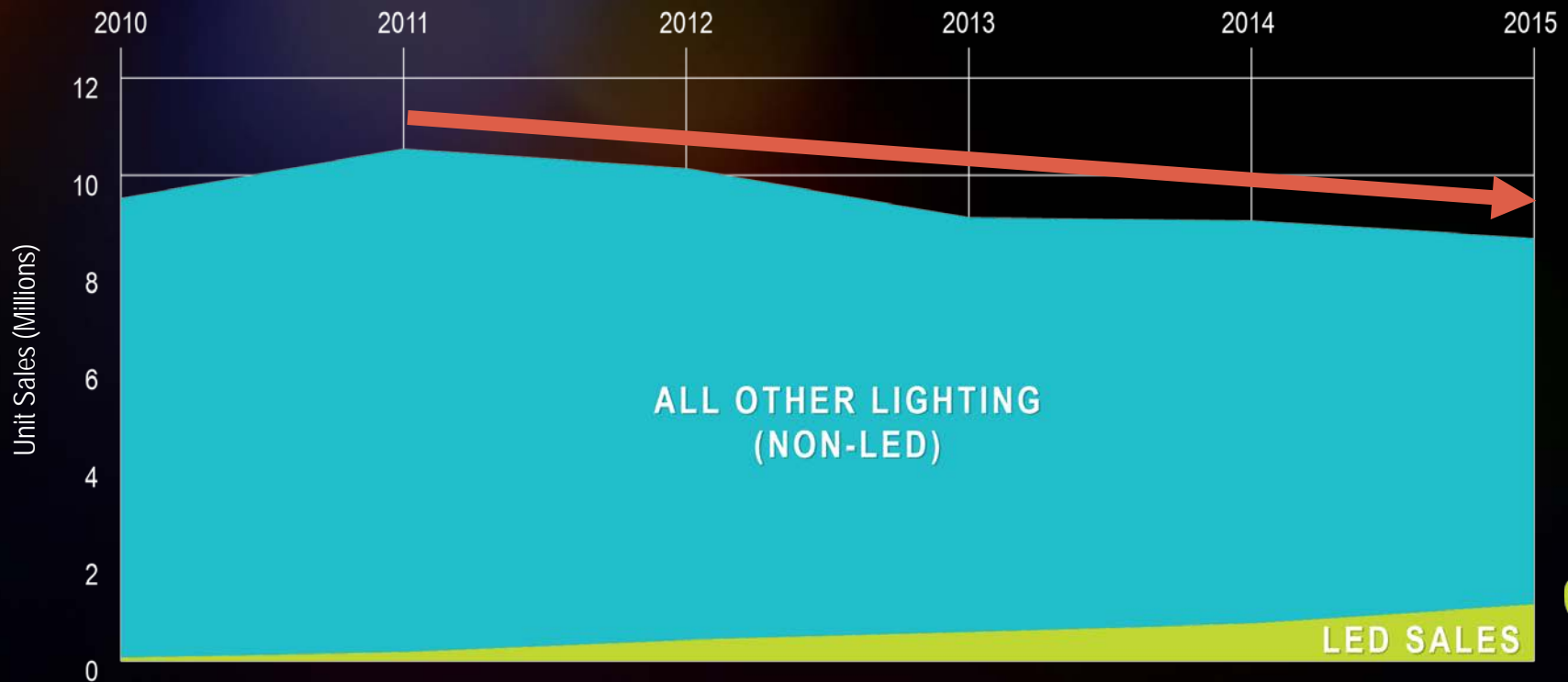
LED sales,
while still a small
part of the market,
are booming



Long-life LEDs mean
fewer replacements



Total Unit Sales are shrinking

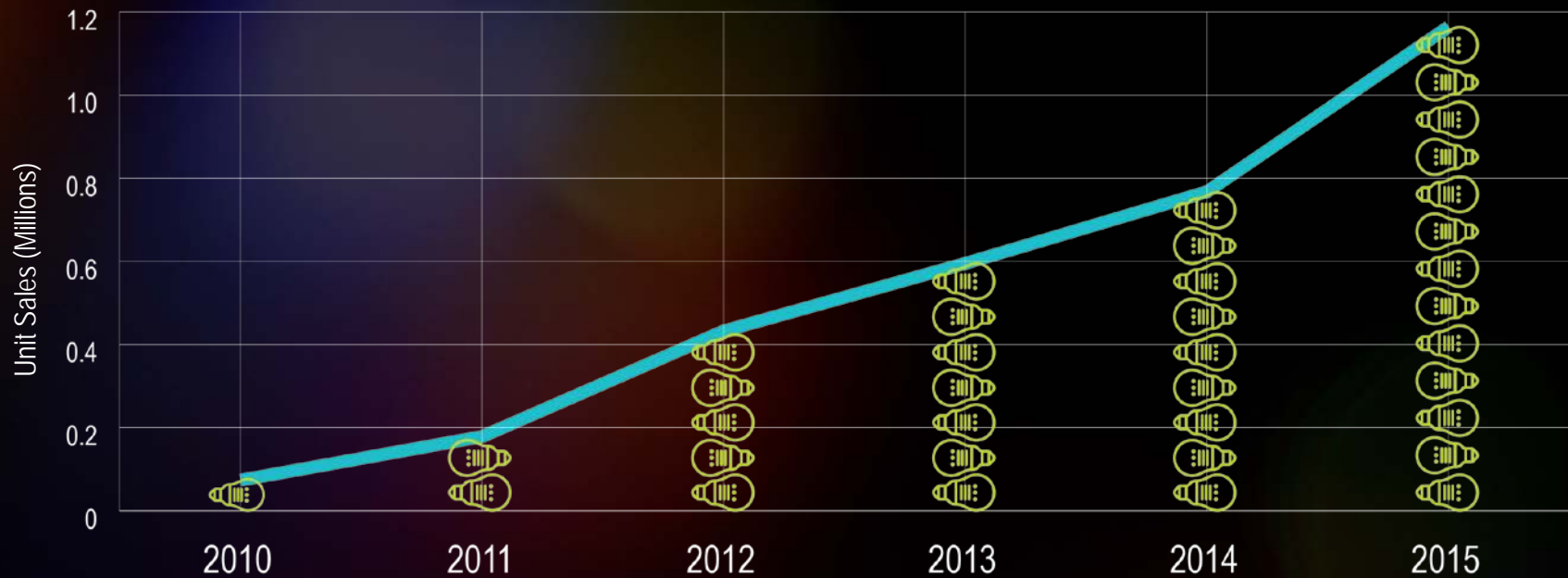


as LED sales grow

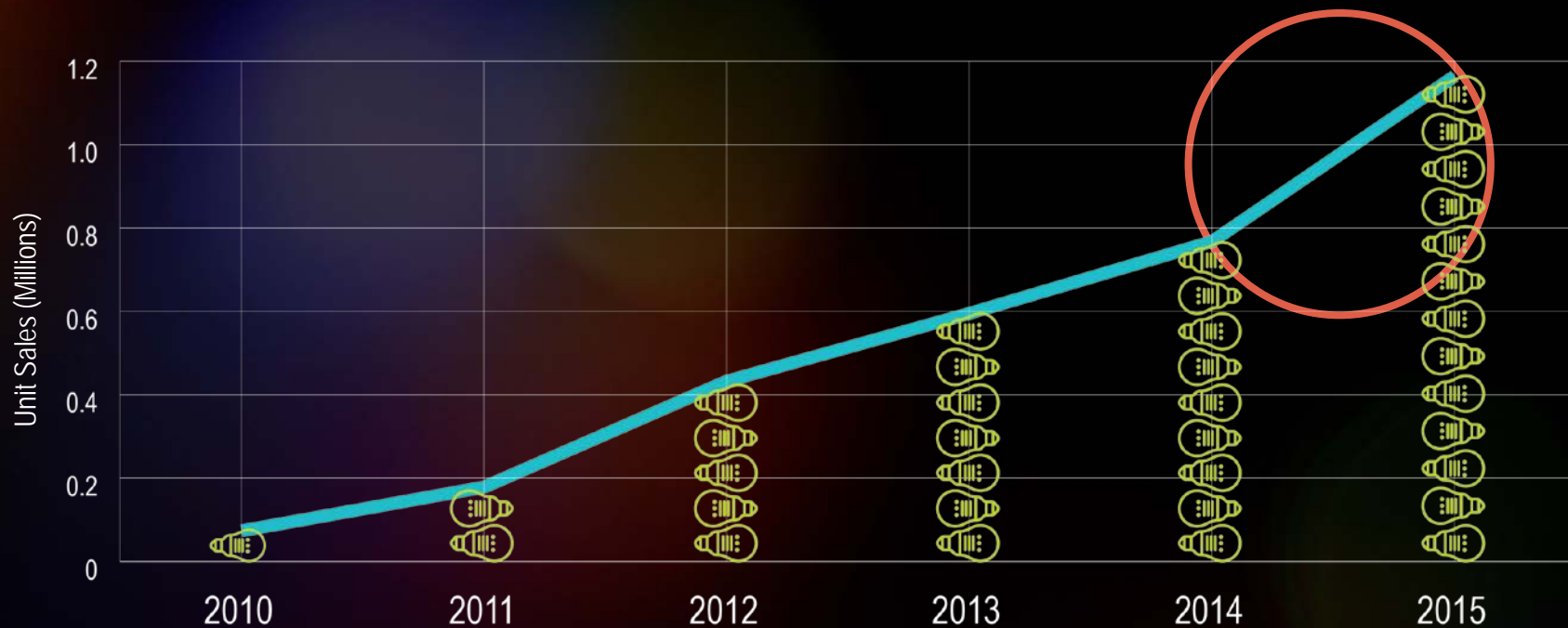


Manufacturers are **Phasing Out** Legacy Products





But LED Unit Sales are Growing



But LED Unit Sales are Growing



LED GROWTH

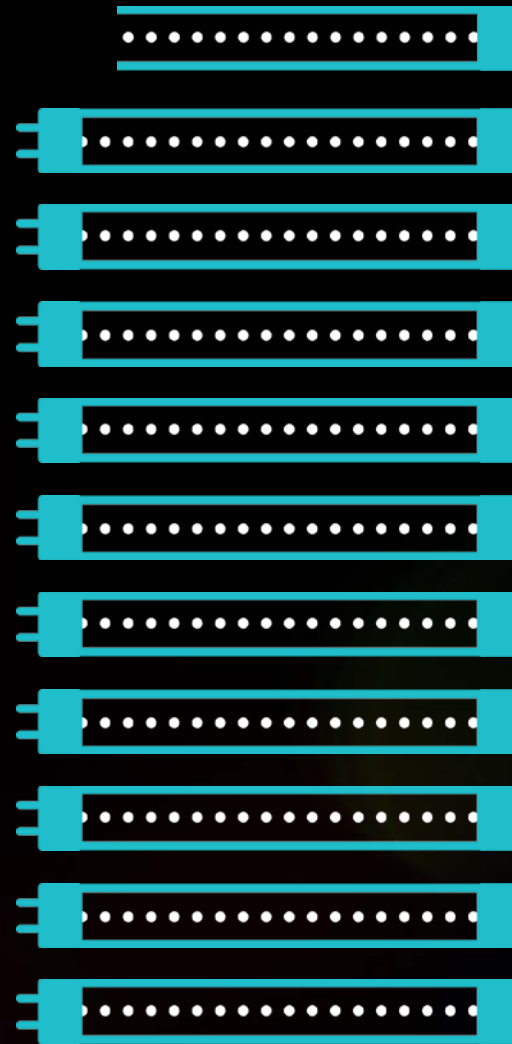
Product Type Differences



2015 TLED Unit Sales
saw 2.7x Growth



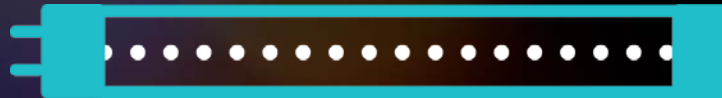
2014: 84.7K



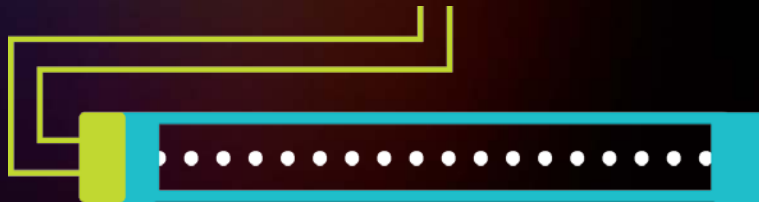
2015: 229.9K



Product Offerings are Expanding in TLEDs



Good: TLEDs



Better: Retrofit Kit



Best: LED Luminaire +
Controls

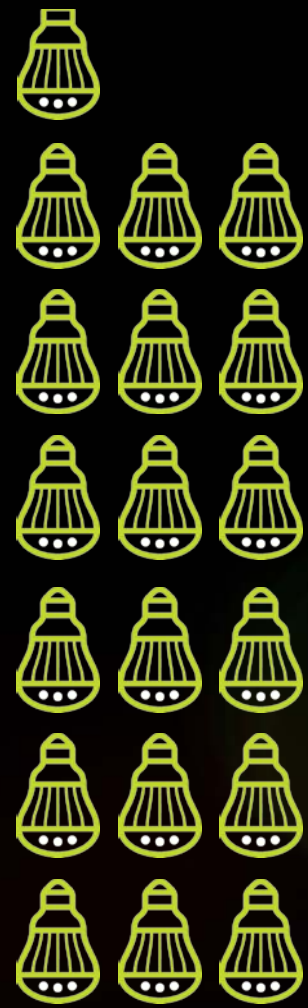




Downlights saw 2x Growth

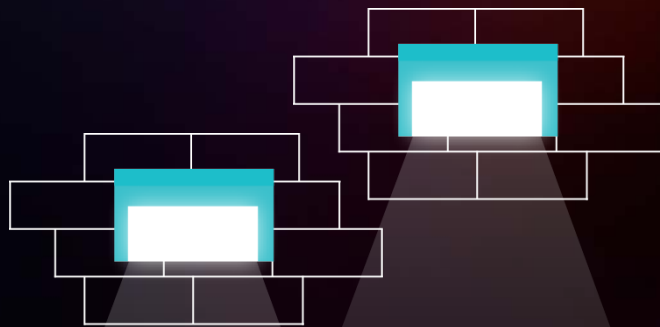


2014: 97K

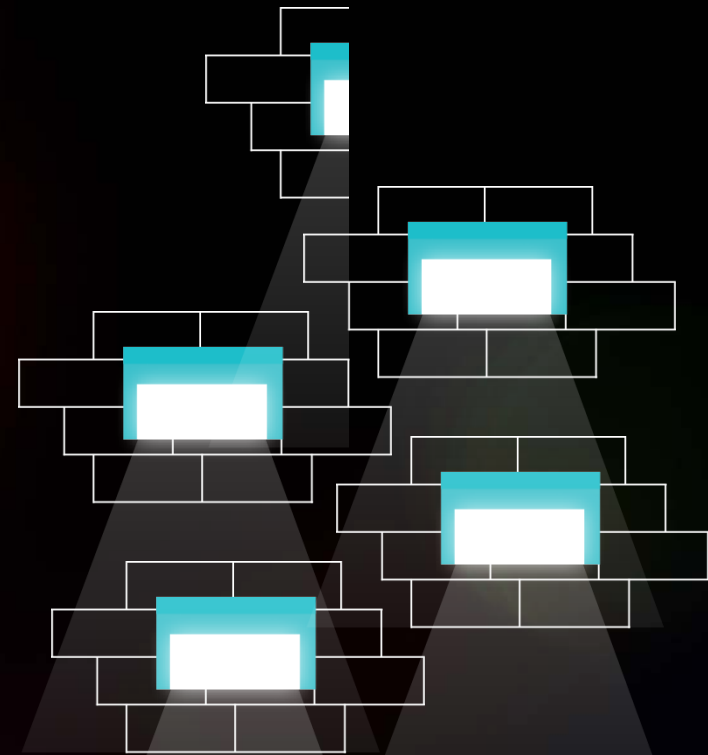


2015: 199K

Fixtures saw 2.2x Growth

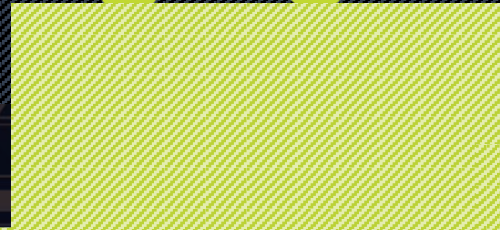


2014: 86K



2015: 189K

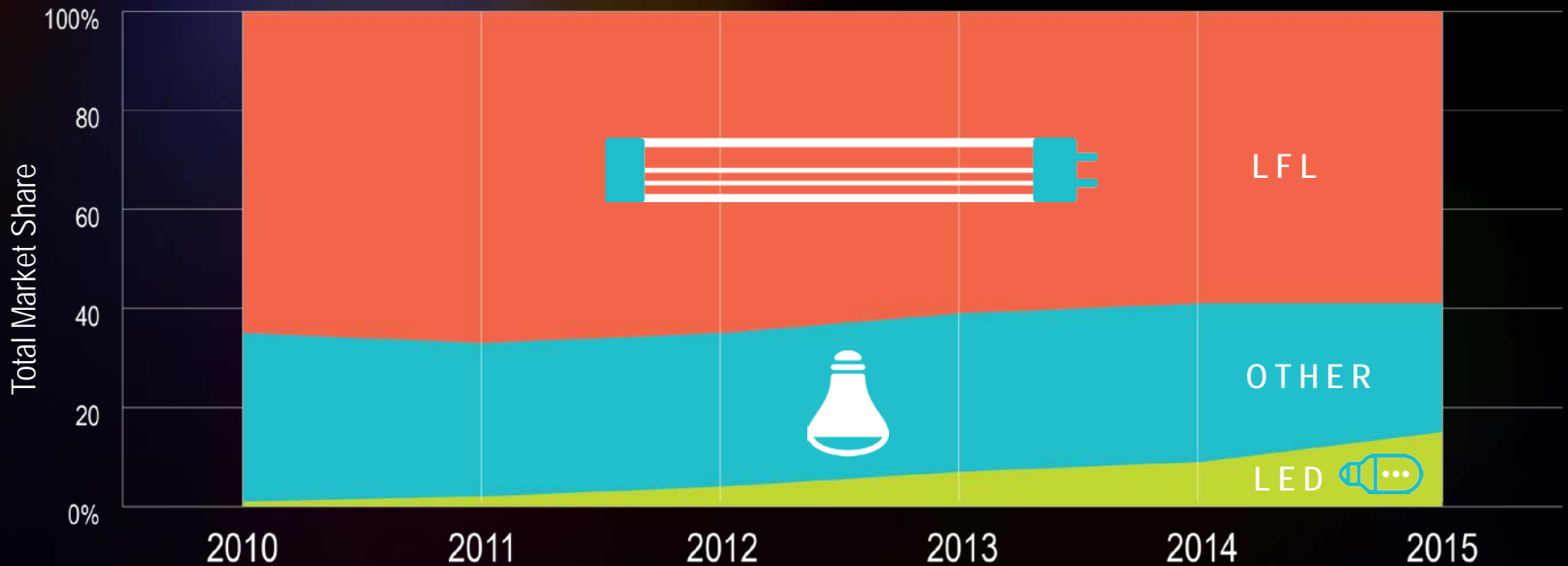


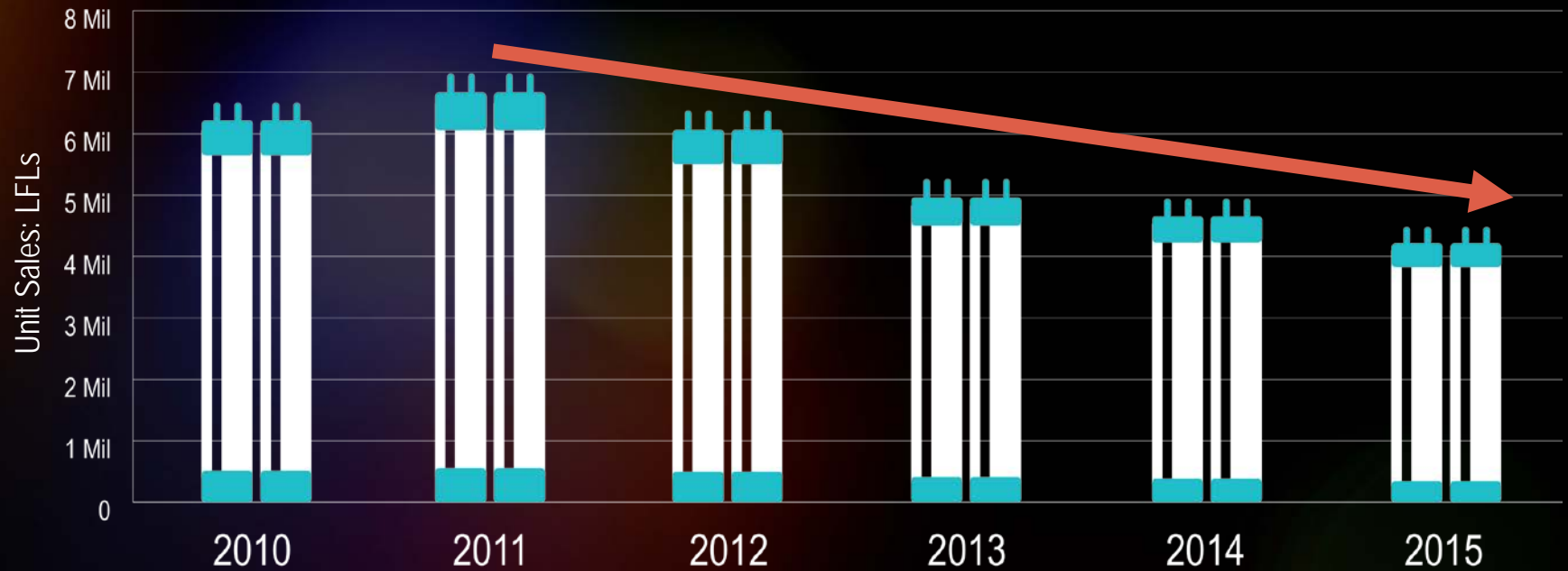


LINEAR FLUORESCENT LAMPS
Still Dominant



LFLs Remain Dominant in Market Share



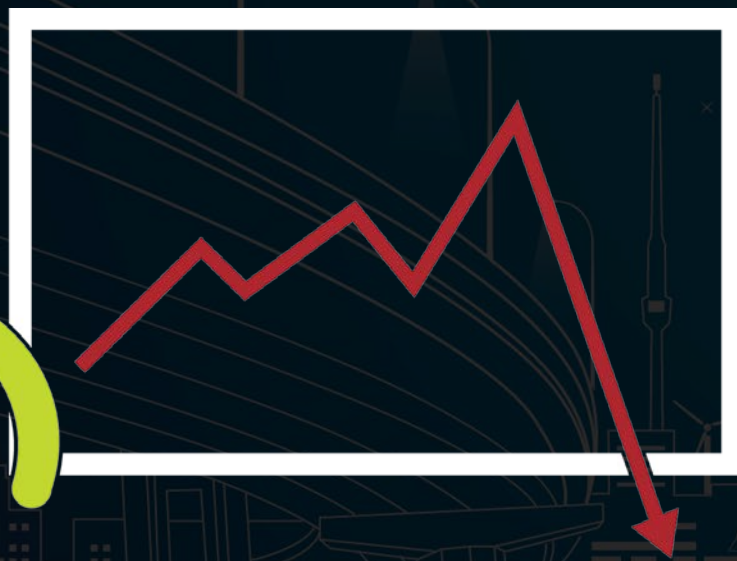


...but show **steady decline**
in unit sales



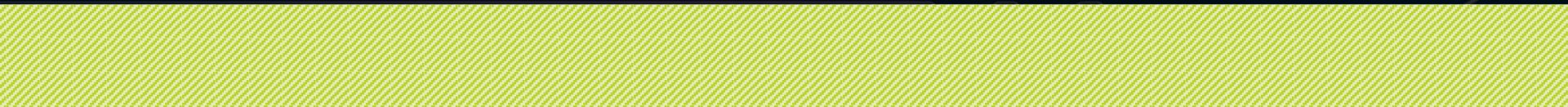
LFLs are shifting toward more efficient options even as sales decline





HID LAMPS

Continue to Decline





HID displaced by
fluorescent and LED

LEDs available for
Hazardous Environments

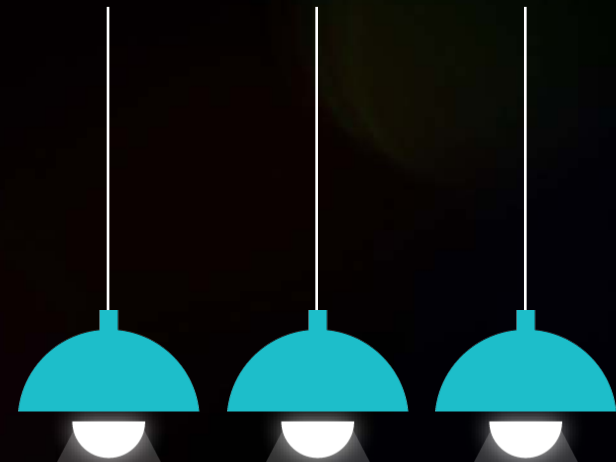




2011: 800K Units

2015: 300K Units

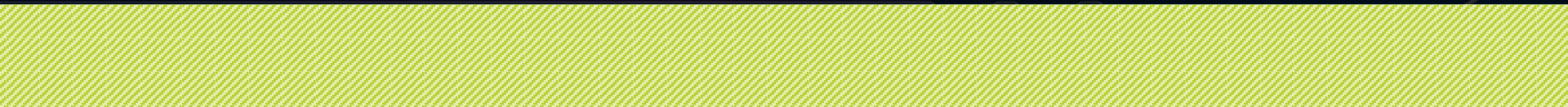
In 2015 HID Unit Sales
dropped 37%





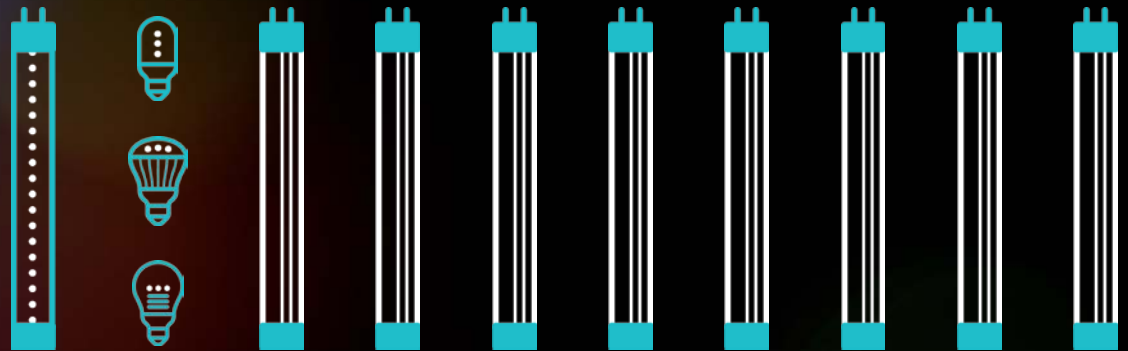
DYNAMIC FUTURE

More Changes to Come



LED in the mainstream

Today



2030

