



Market Research & Momentum Savings Team

Quarterly Call | February 3, 2021

Bonneville
POWER ADMINISTRATION



Agenda

- › Welcome & Introductions
- › Non-Res Lighting Sales Data & Market Intel



Org Name
+
1 new thing you
have noticed in your
neighborhood since
March 2020



Nonresidential Lighting Sales Data & Market Intel, 2020



Sales Data
Collection



Market Intel
Gathering



Nonresidential Lighting Study Activities



Market Modeling and
Momentum Savings



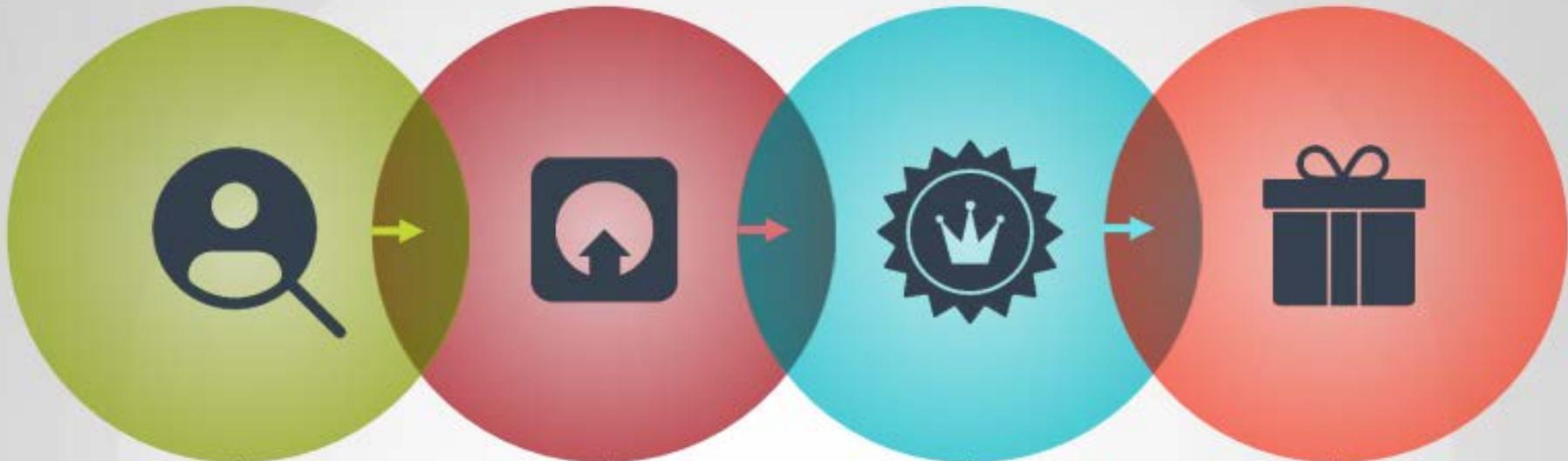
Sales Data Collection and Reporting





7th Year Collecting Distributor Sales Data

Process for Distributor Data Submission



Recruitment

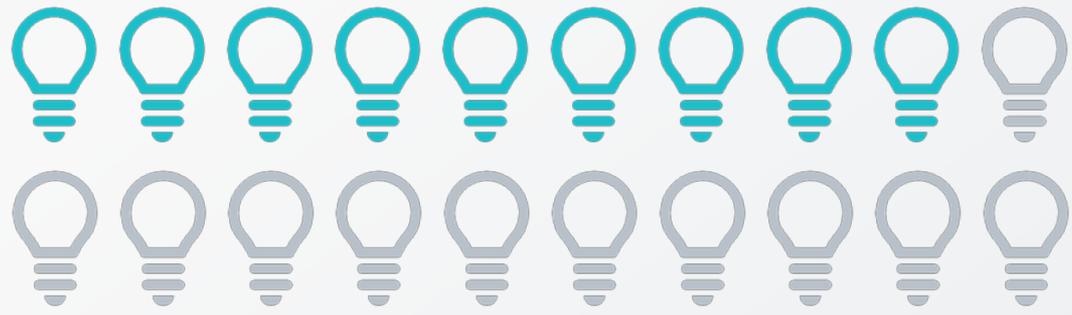
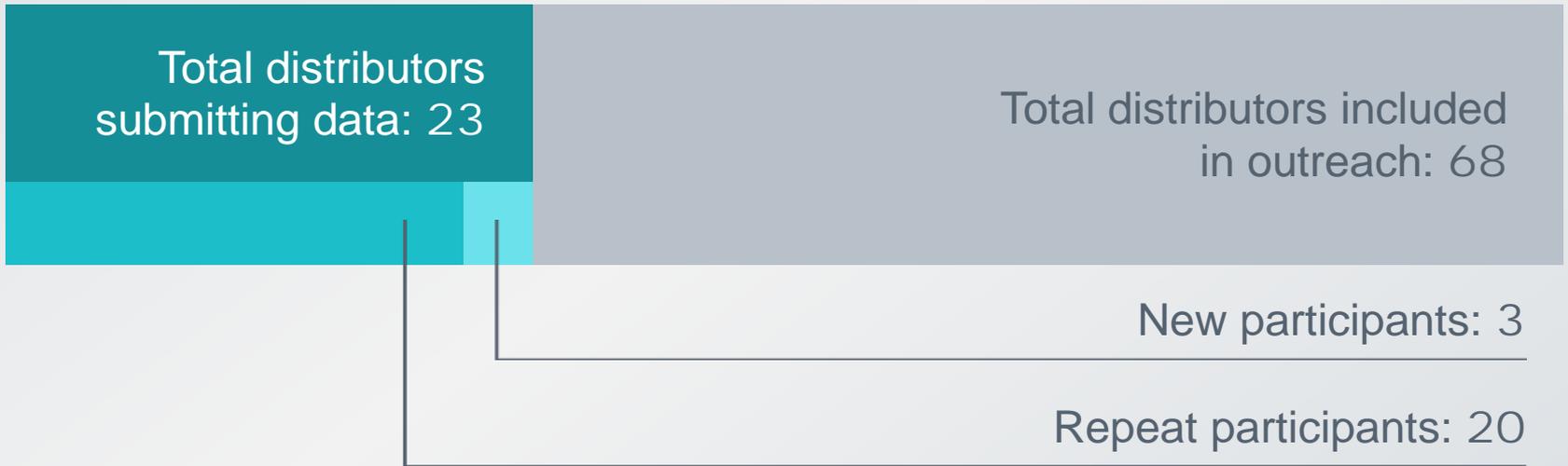
Data Submission

QA/QC

Distributor Incentive



Disposition of Distributor Outreach

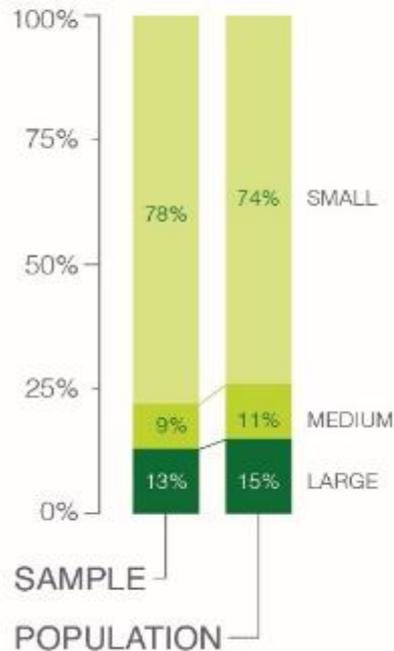


Data collected from these 23 distributors represented ~45% of total market unit sales

Representative Sample of Distributors

Mix of Distributors Submitting Data Compared to the Pacific Northwest Distributor Population, 2019

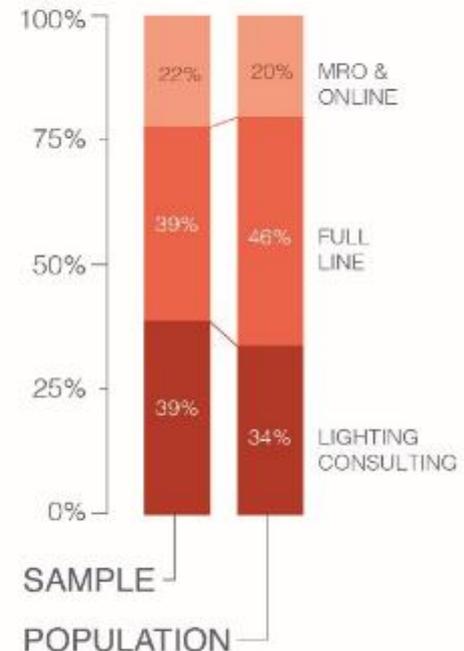
Relative Size



Distribution Area



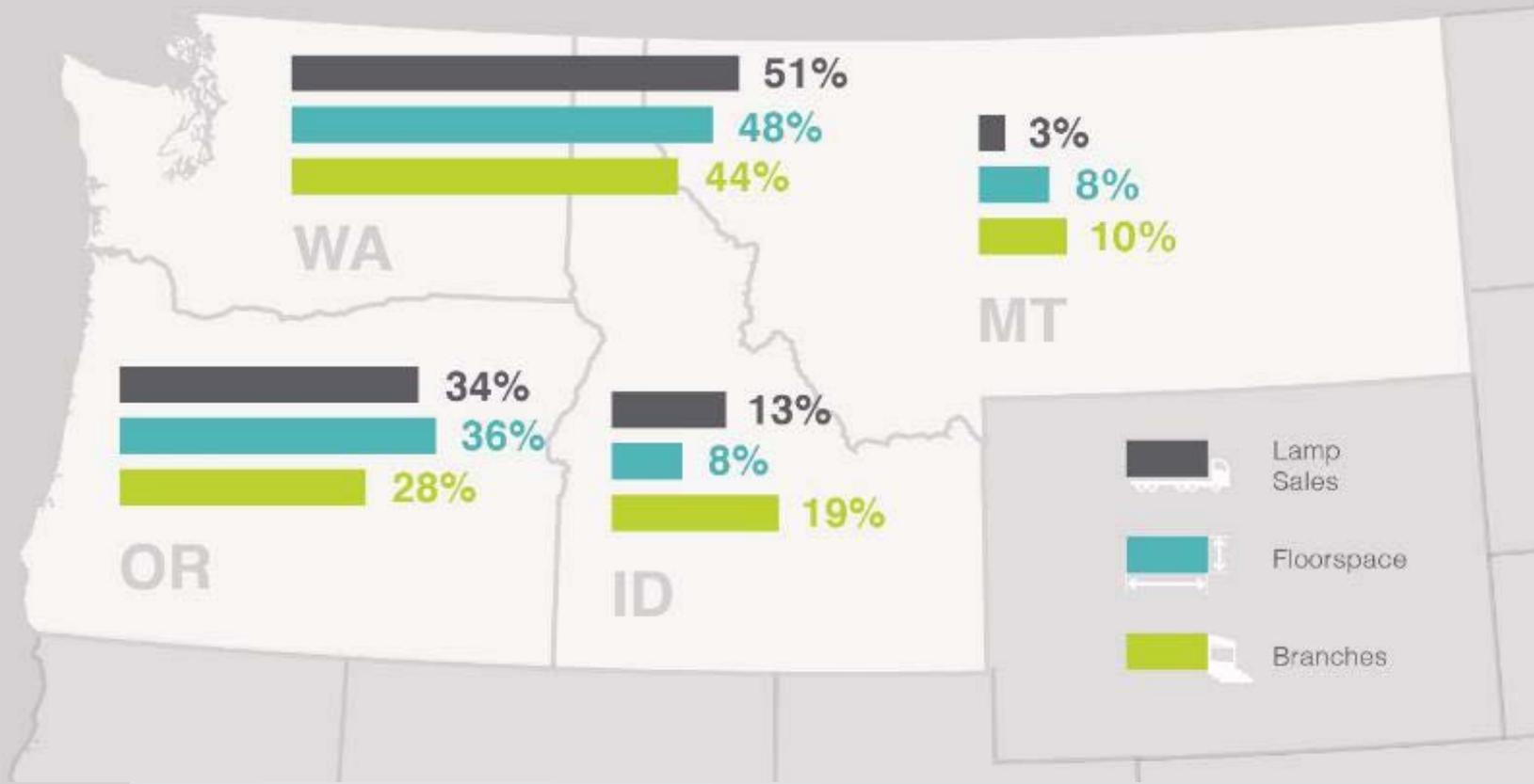
Business Model





Data is Representative of the Region

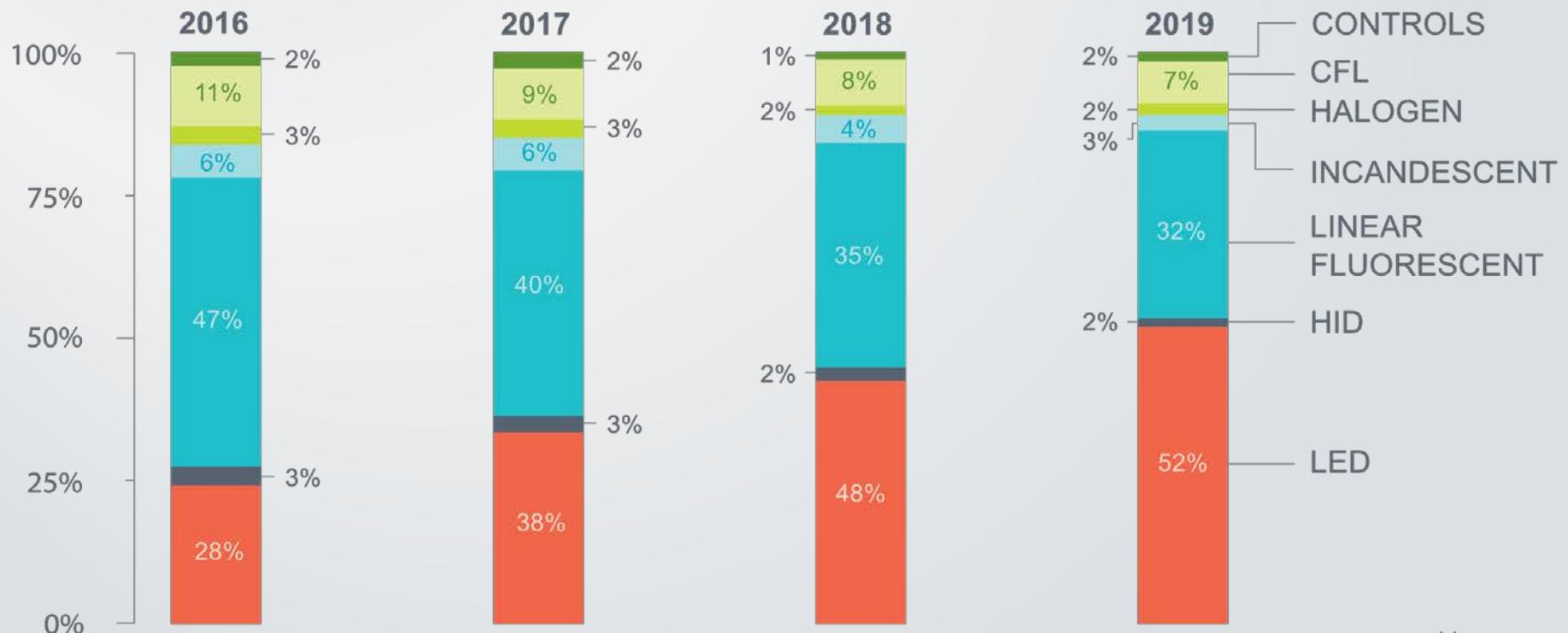
Distributor Lamp Shipments, Floor Space, and Branches by State, 2019





LEDs Continue Gaining Market Share

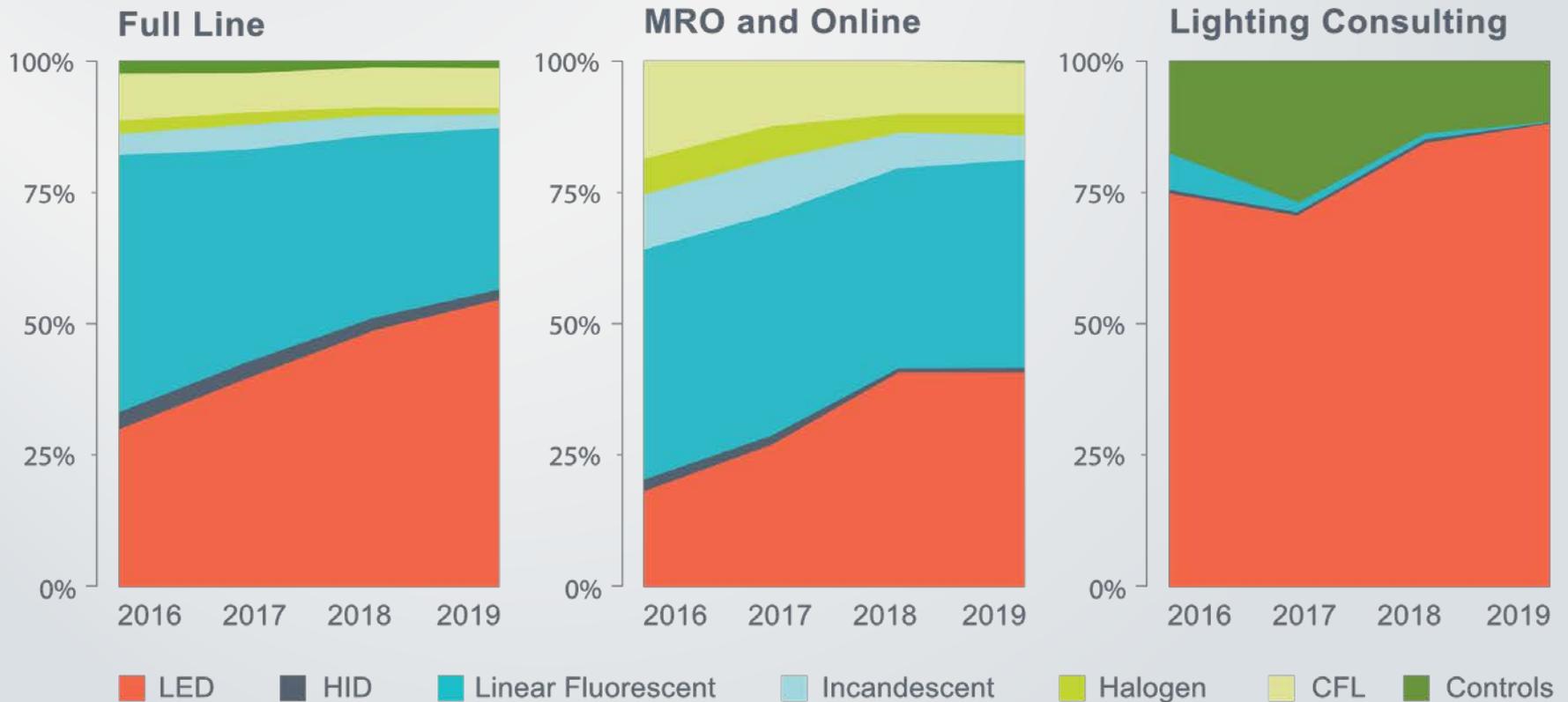
Percent of Unit Sales by Technology Type, 2016-2019





Sales Mix Varies by Distributor Business Model

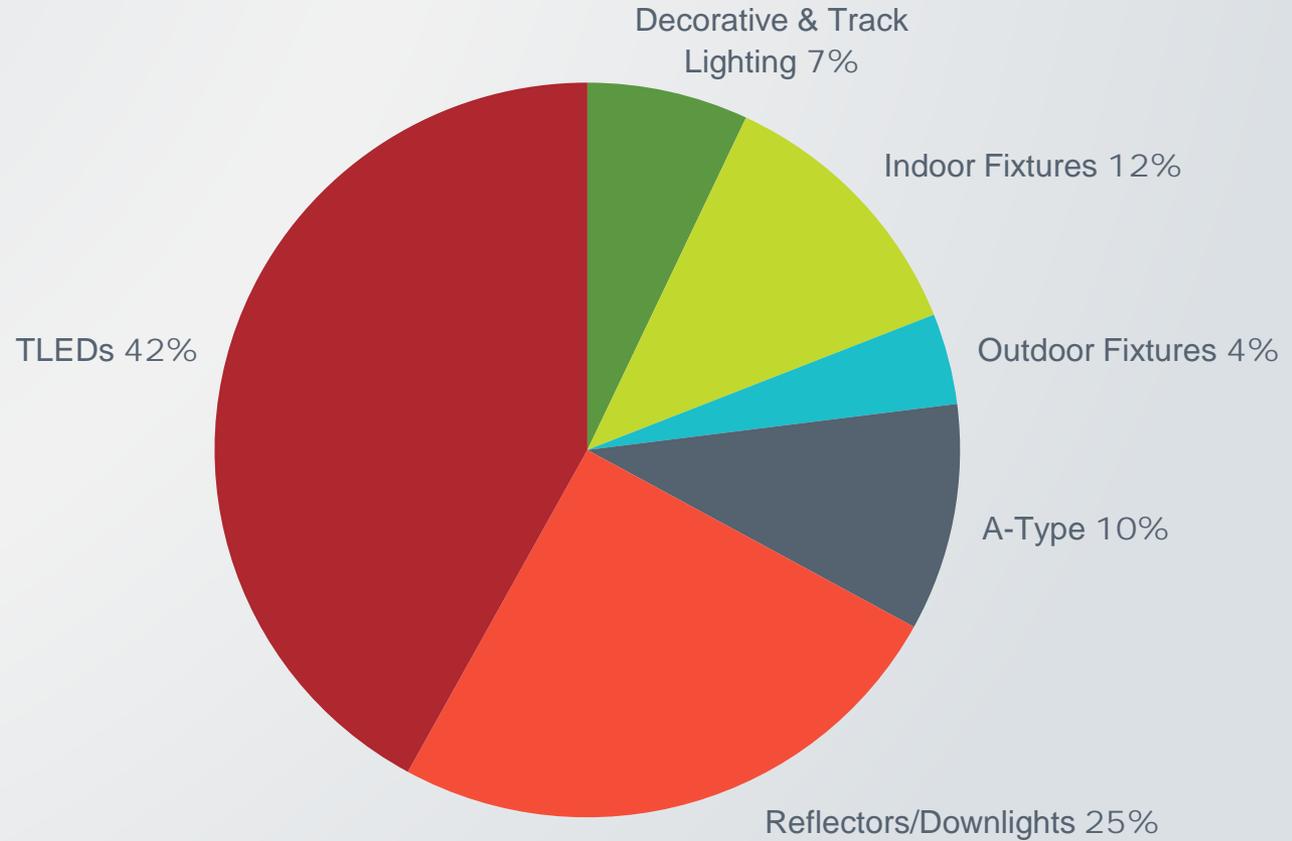
Percent Unit Sales by Tech Type Across Business Models, 2016-2019





TLEDs Make Up 42% of LED Unit Sales

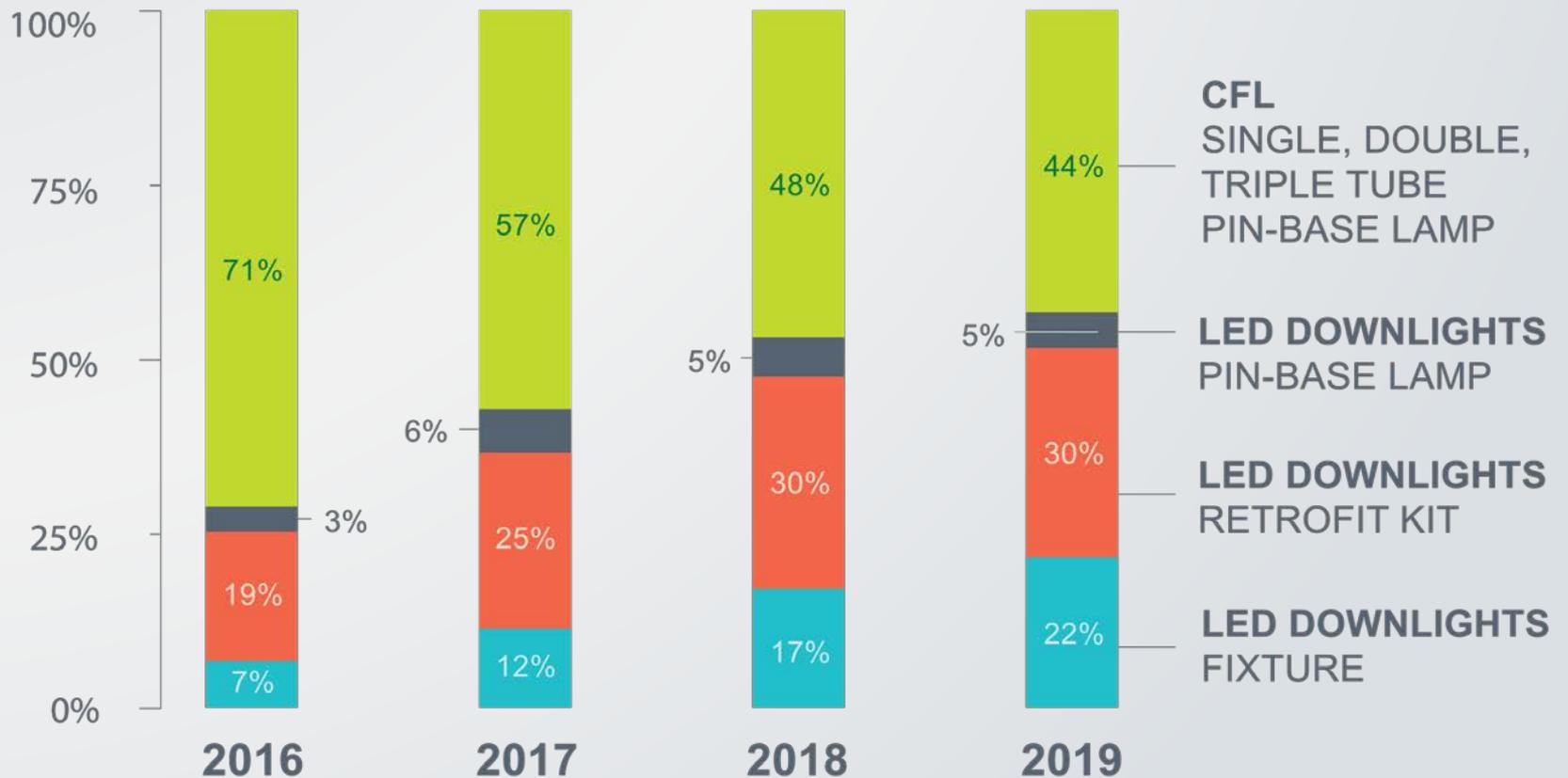
Percent of LED Unit Sales, 2019





LEDs Steadily Replace CFLs

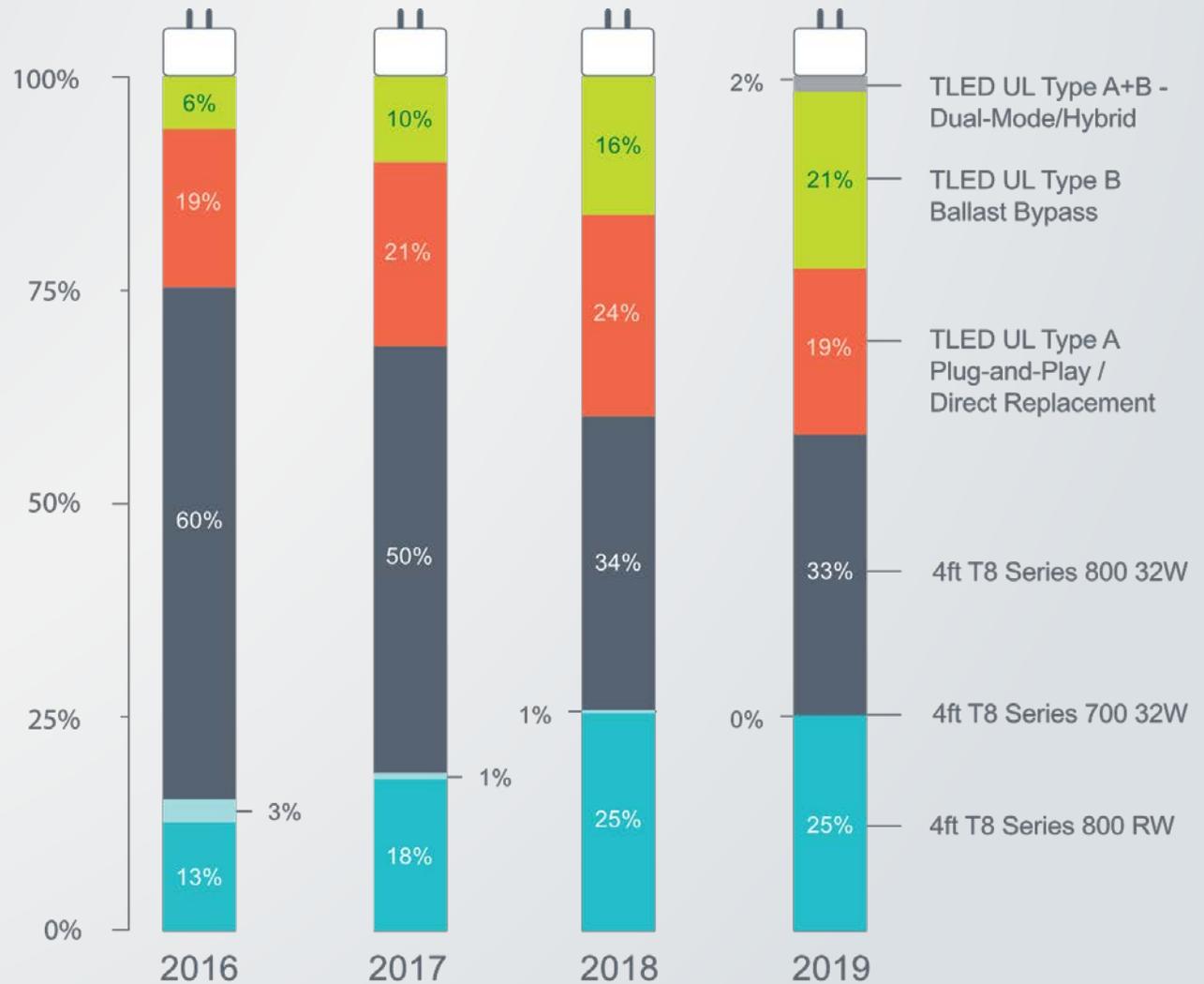
Downlight Sales by Technology Type, 2016-2019





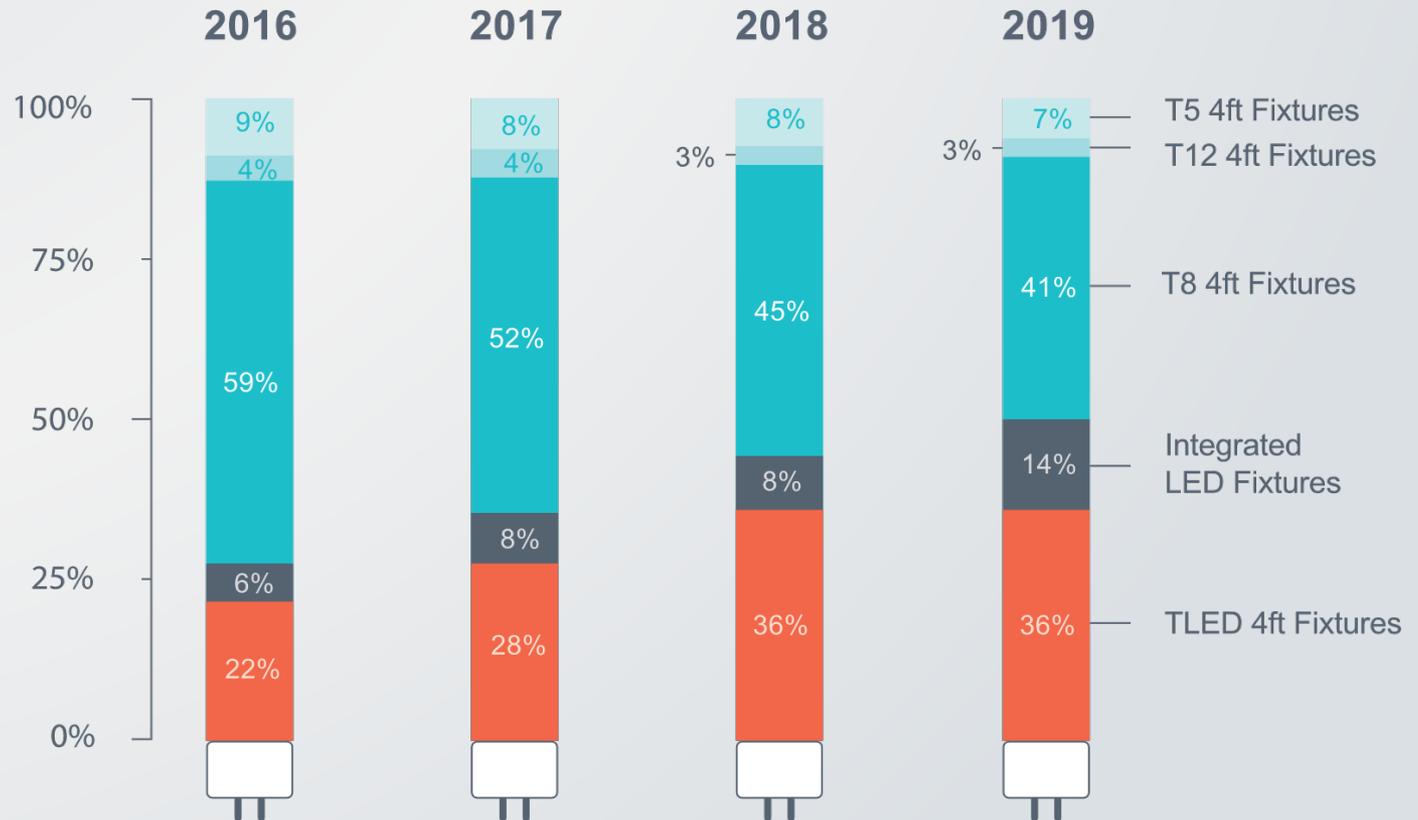
Percent Linear Lamp Sales by Type, 2016-2019

**40% of
Linear
Lamps
are
TLEDs**



Ambient Linear Sales are **50% LED**

Percent Ambient Linear Lamp and Fixture Sales by Type, 2016-2019

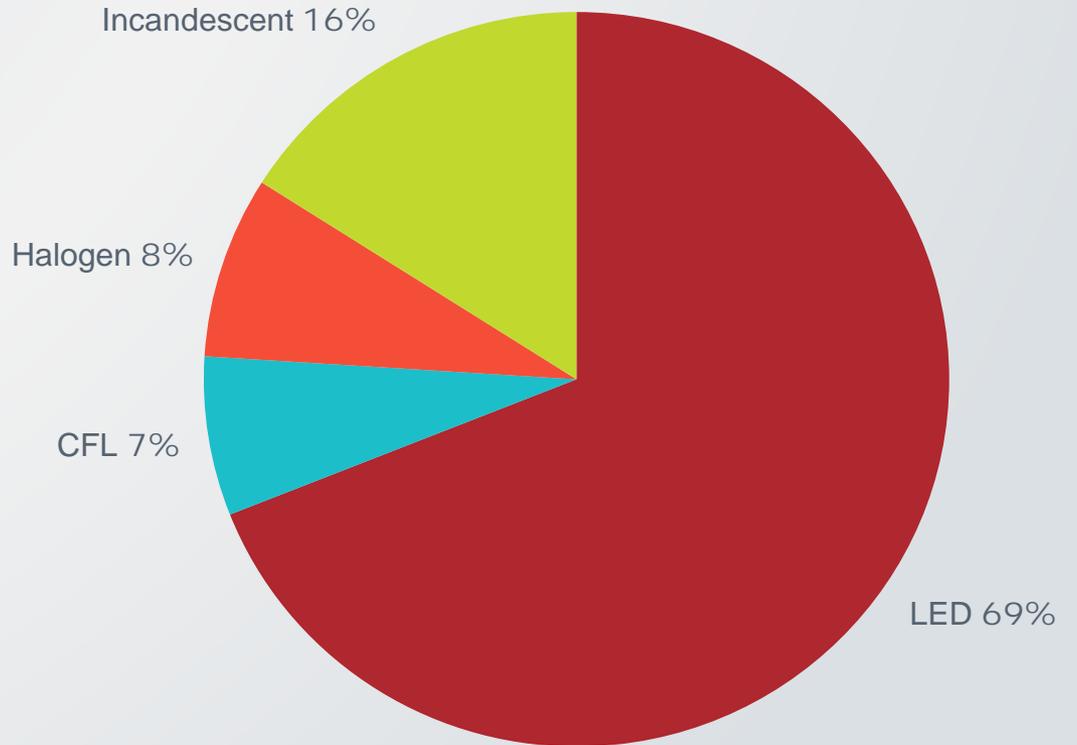


Note:
Sales are normalized to an average of two lamps per fixture



**69% of
Screw-In
Lamp
Sales are
LED**

Percent of Screw-In Lamp Sales by Type, 2019





Market Intel Gathering

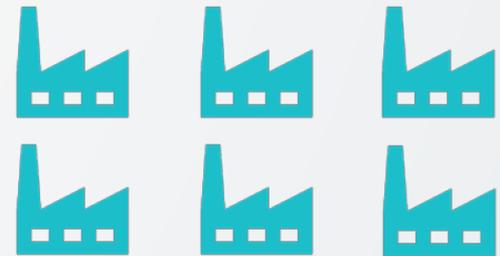




Manufacturer Interviews



8 manufacturing
companies
(2 large, 6 small)

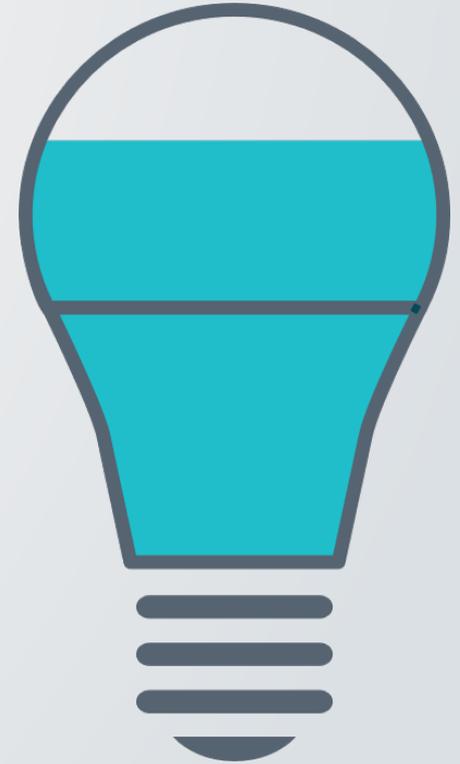


10 manufacturing staff



LEDs

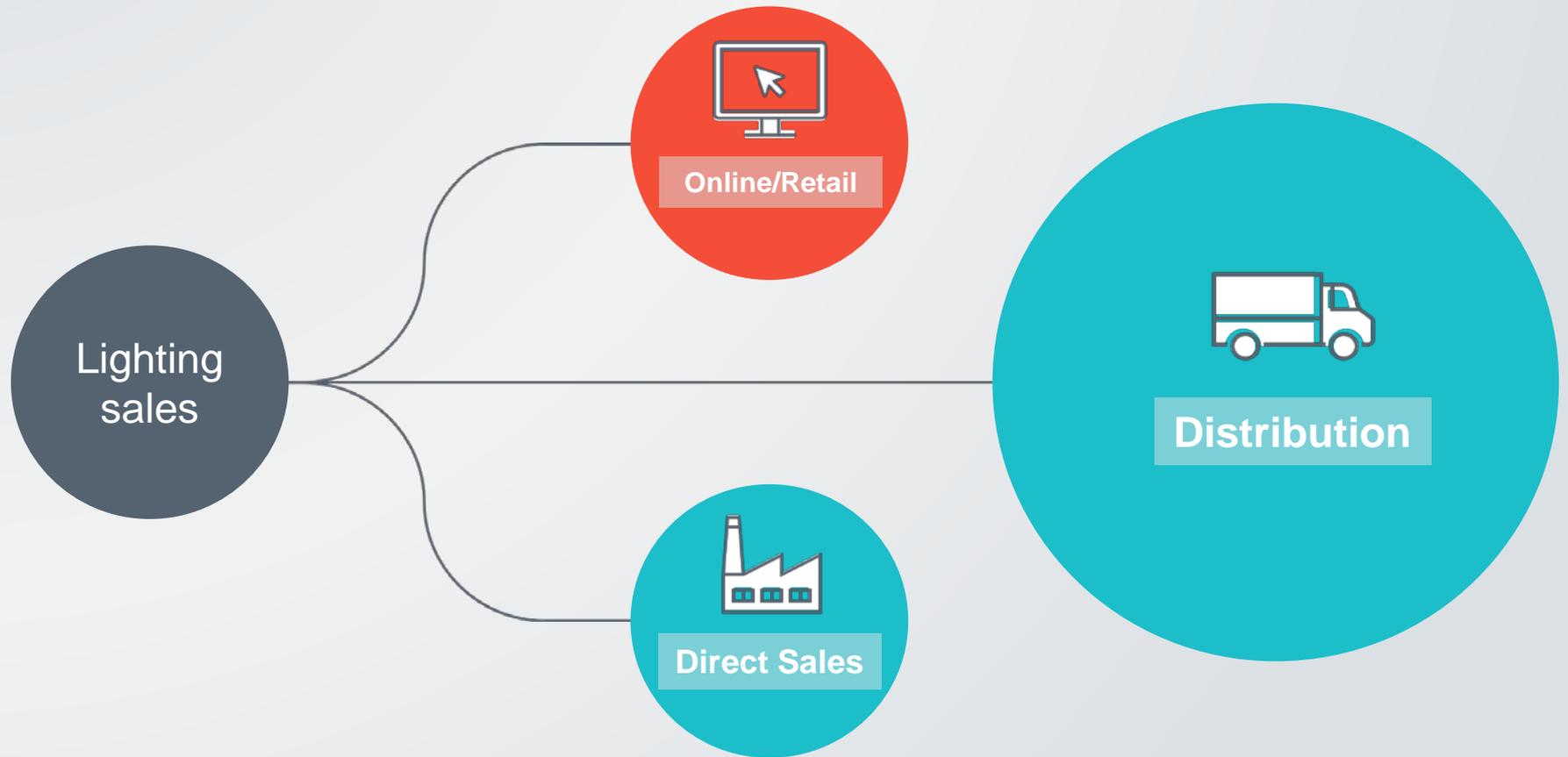
Make up 70%
to 100% of
manufacturers'
sales and will
continue to
grow



Cannabis is the one
exception for LED
proliferation, but this is
expected to change in
the next decade

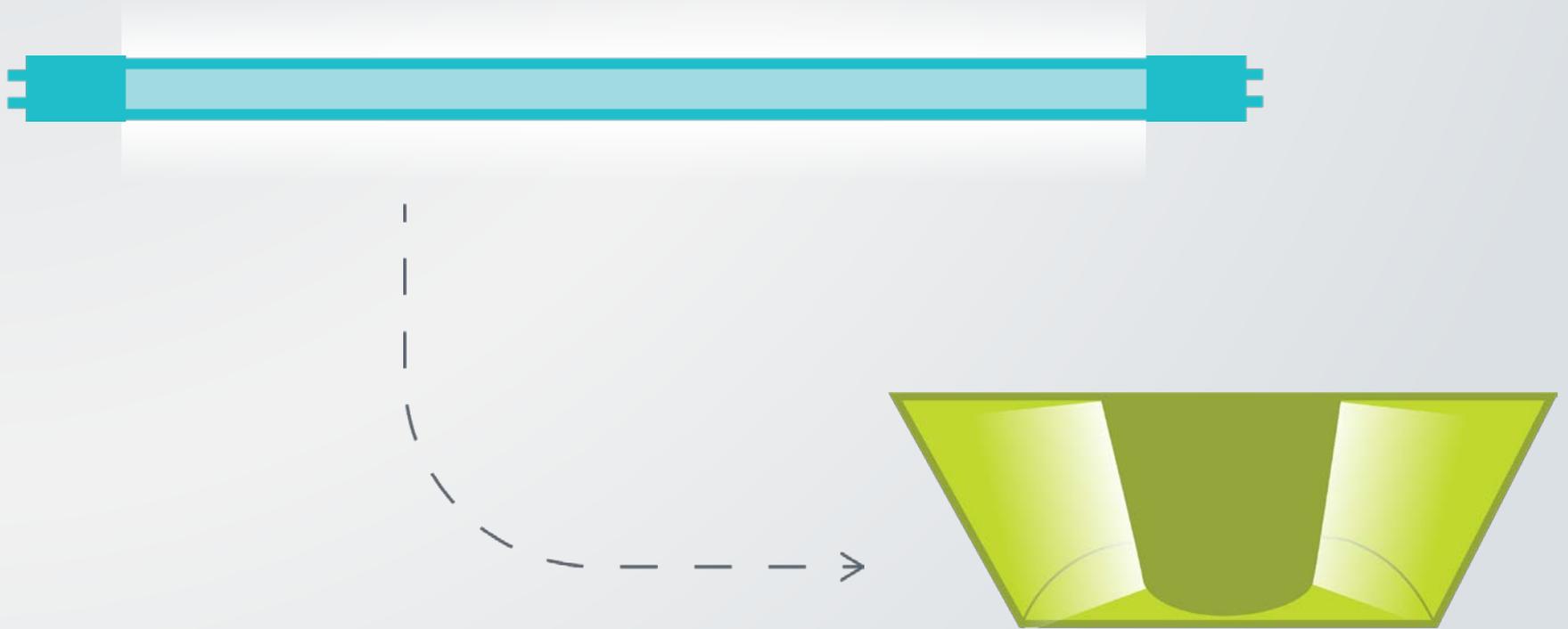


Sales Channels





Key Trends in Manufacturing





COVID-19 Impacts



Supply Chain Issues



Decrease in
sales/demand



Not seeing uptake in legacy or
lower quality/cheaper products



Sales Data Collection & Market Intel Gathering: Goals, **2021** and Beyond



Continuous improvement to the data collection process



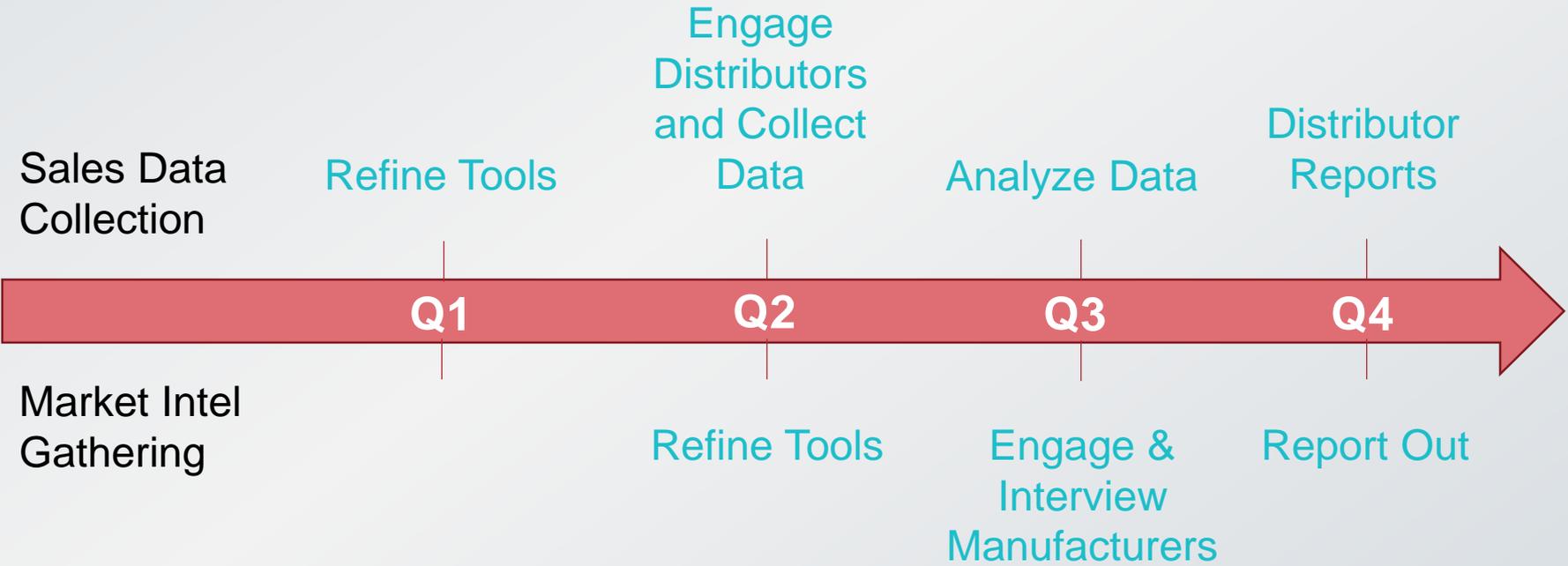
Leverage market actor engagement to further research goals



Streamline data processing using analytical tools



2021 Project Overview



Contact



TIM BANKROFF

BPA Project Lead

tjbankroff@bpa.gov



See you on May 5th, 2021!

MomentumSavings@bpa.gov

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