



# How the **LED Tidal Wave** Is Changing the Lighting Business in the Northwest

MARKET ACTOR INTERVIEWS

BONNEVILLE  
POWER ADMINISTRATION





10

Installation Contractors  
& Maintenance Firms



13

Outdoor & Street Lighting  
Professionals



2

Manufacturers



10

Manufacturer  
Reps



22

Commercial Chain  
Decision Makers



13

Industrial Lighting  
Professionals



15

Distributors (via Online  
Questionnaire)



# A Maturing LED Market Means **New Players**





# Manufacturers in Asia





# Small and Medium-Scale Manufacturers





# Re-Labelers





# Lighting Consultants

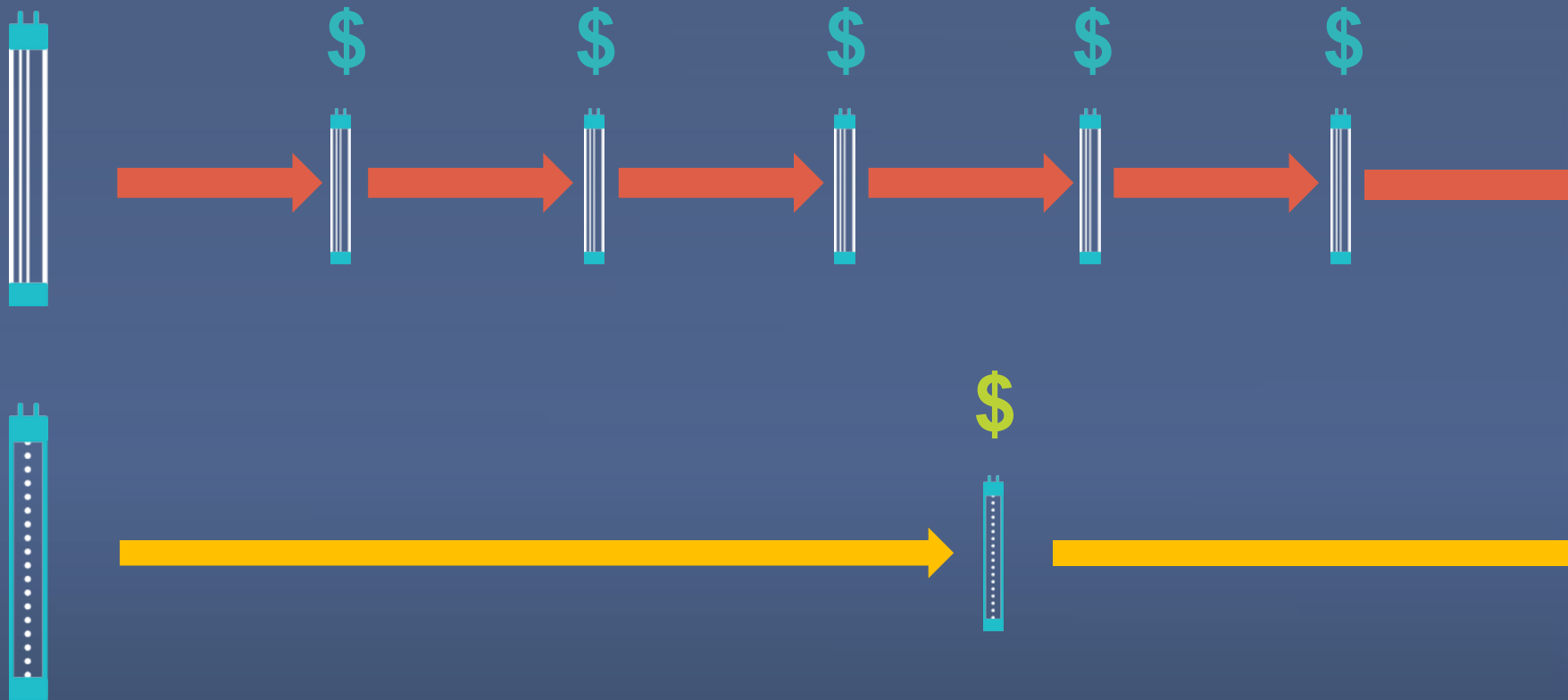


# Competition in the LED arena leads to declining prices





Because of longer-life products,  
unit sales are declining





Manufacturers are phasing out legacy products...



... and focusing R&D efforts on **LED**



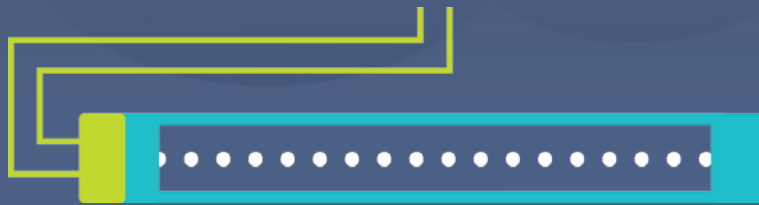
Traditionally, LED lamps were the **premium** option...



...at a **premium price**



Good: TLEDs



Better: Retrofit Kit



Best: LED Luminaire +  
Wireless Controls



Now, LED product offerings **are expanding** to include good/better/best options

Competition + product complexity  
are driving **sophisticated and  
consultative** sales strategies



ROI Analysis & Strategy

Consultative / Partnership

Product Ed. & Training





Online Sales  
Are Increasing



Online-Only Suppliers





# Brick & Mortar Distributors with Online Presence

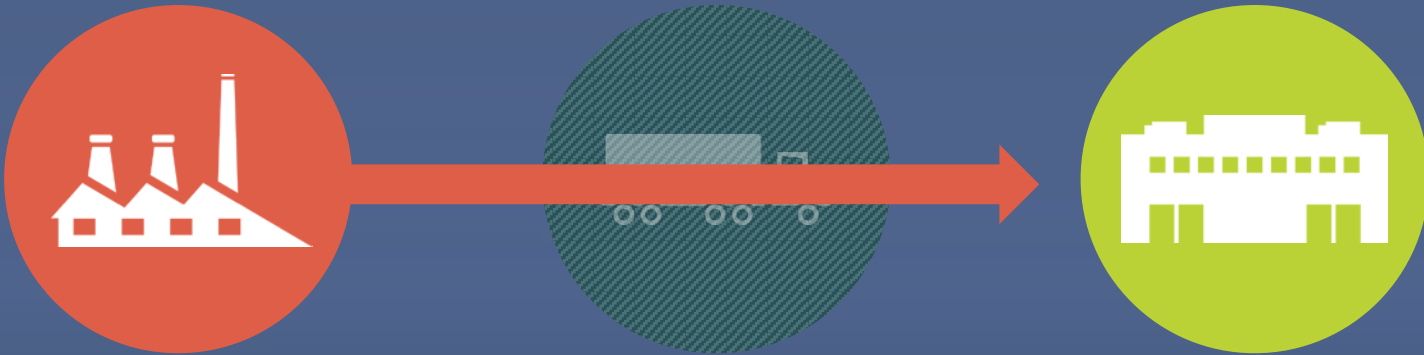


Manufacturers selling direct  
to end users online

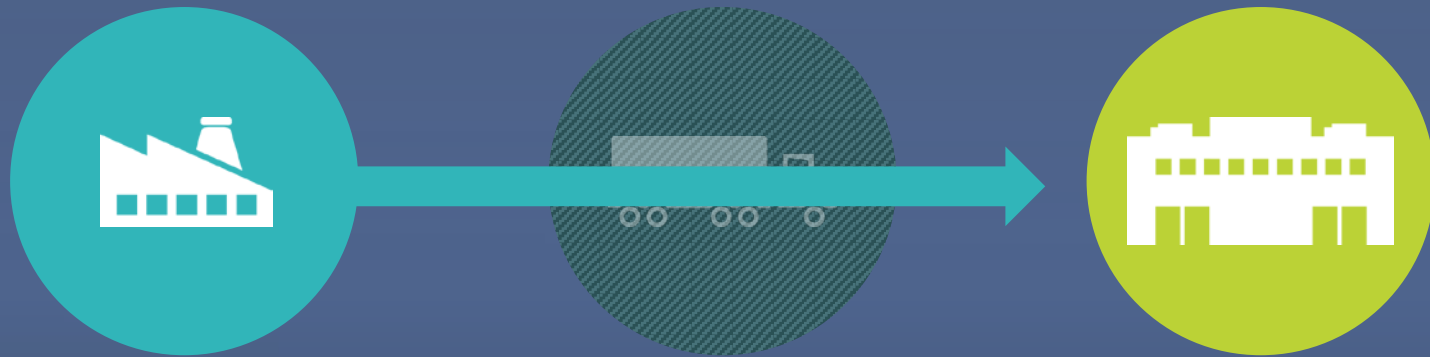
# Supply chain is *evolving*



Some large customers  
demand **direct sales**



Small businesses also get into the  
**manufacturer-direct market** to  
compete on cost





Large businesses  
lead the pack



Falling Behind



Surviving



Pulling Ahead



# The New Normal