RESIDENTIAL LIGHTING

SHAKE-UP:

ENERGY STAR 2.0

AND NEW MARKET ACTORS
There is some SCUTTLEBUTT around the role of ENERGY STAR LEDs in the marketplace.
ENERGY STAR LEDs ARE...

More Expensive
Omni-Directional
Dimmable
Longer Lifetime
Some manufacturers think ENERGY STAR 2.0 specification is TOO STRINGENT
...AND OUT OF STEP

with current consumer preferences and awareness.
Other manufacturers DISAGREE.

They built their business model on high-quality ENERGY STAR lamps.
RETAILERS ARE ACTING.

WHILE THE POLICY DEBATE CONTINUES,
LESS OF THESE

22.8 years

10 years
MORE OF THESE.

4.6 years
THE SUPPLY CHAIN IS CHANGING TOO.
<table>
<thead>
<tr>
<th>Category</th>
<th>Manufacturers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Manufacturers</td>
<td>GE, Osram Sylvania, CREE, Philips</td>
</tr>
<tr>
<td>Contract Manufacturers</td>
<td>MLS, San’an Opto</td>
</tr>
<tr>
<td>Small &amp; Mid-sized</td>
<td>MaxLite, TCP, Lighting Science Group</td>
</tr>
<tr>
<td>Traditional Retailers</td>
<td>Home Depot, Lowe’s, Walmart, ACE Hardware, Fred Meyer</td>
</tr>
<tr>
<td>Online Retailers</td>
<td>1000bulbs.com, LampsPlus.com, LightingDirect.com</td>
</tr>
</tbody>
</table>
THEN.
IMPLICATIONS AND QUESTIONS

Where will prices go from here? What does that mean for incentives?

What products are coming? Which are going?

How will programs work with online and contract manufacturers?
But what do the **DATA** **SAY?**
NEEA’s RETAIL SHELF SURVEYS
MORE GENERAL PURPOSE ENERGY STAR LEDS IN 2015

- 2012: Not ES, ES
- 2013: Not ES, ES
- 2014: Not ES, ES
- 2015: Not ES, ES
AND MORE SPECIALTY
ENERGY STAR LEDs IN 2015

Not ES

ES

2012
2013
2014
2015
TRUE AT ALL THREE RETAILERS

DIY Retailer 2

Mass Merchandise Retailer 1

DIY Retailer 1

% General Purpose ENERGY STAR LEDs
THINGS TO CONSIDER
DISPARATE TIMING

- Summer Shelf Study: August 2015
- ENERGY STAR Partner Meeting: October 2015
- Products on Shelves: 2016 and Beyond
SAMPLE SIZE

Number of Stores in Sample

- 2012: 13
- 2013: 13
- 2014: 12
- 2015: 53
RETAILER VARIABILITY

LEDs at 10 sampled DIY Retailer 2’s stores (2015)

Store Locations

Not ENERGY STAR

ENERGY STAR

25%
75%
73%
27%
UPCOMING

- 2015 sales data (select retailers)
- Another round of NEEA shelf survey (all retailers)
- Interviews with online lighting retailers
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