BONNEVILLE POWER ADMINISTRATION

2024 Annual Lighting Survey of Northwest Electrical Distributors 2020–2024

September 2025

Report Highlights

68%

LED sales as a percentage of total unit sales continue to increase, making up 68% of all unit sales in 2024. Screw-in lamps and downlights have the highest presence of LEDs at 91% and 78% respectively.

-12%

Total unit sales decreased by 12% from 2023 to 2024, with LED unit sales declining by 10%. This marks the lowest total sales volumes observed since sales data collection began in 2013, which may reflect the growing saturation of LED products and their lower replacement needs.

44%

TLEDs continued to steadily gain market share, reaching 44% of all LED sales in 2024, up from 41% in 2023. While LED unit sales and indoor fixture sales declined, TLED unit sales remained relatively flat, indicating sustained interest in simple, affordable alternatives to linear fluorescents.

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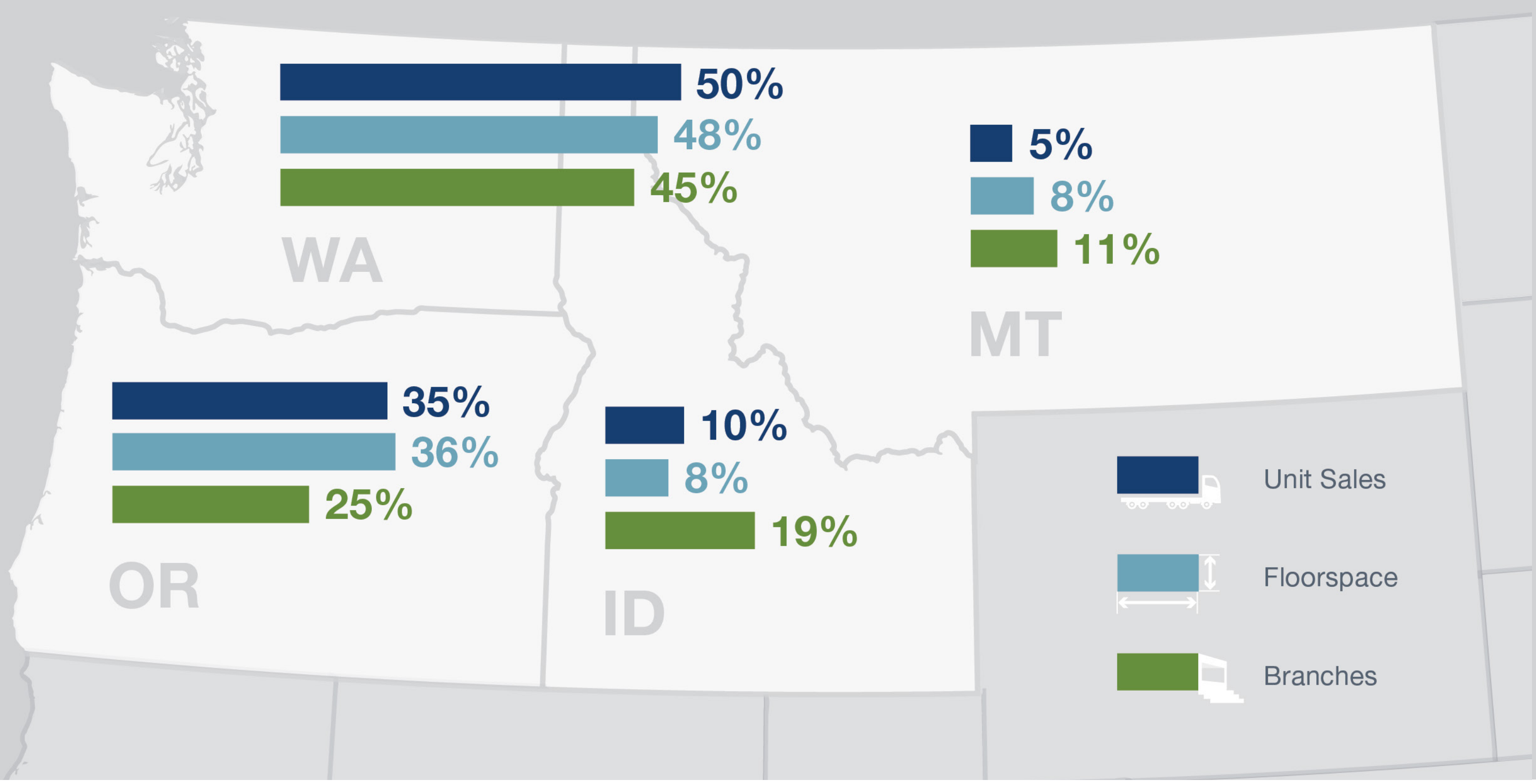
Report Overview

2024 PARTICIPANTS	IN DATASET YEARS COVERED	TOTAL DISTRIBUTORS	MARKET SHARE REPRESENTATION
22	**2020 – 2024**	**48**	**~62%**

This report presents the results of the twelfth annual Northwest Energy Efficiency Alliance (NEEA) and Bonneville Power Administration (BPA) Northwest Electrical Distributor Lighting Survey (lighting survey). The Resource Innovations team (research team) worked with NEEA program staff and Evergreen Energy Partners to recruit participants, successfully engaging 22 participants in the 2024 sales data collection effort. The research team combined these data submissions with previously collected data and filled data gaps caused by inconsistent participation to produce a full dataset that covers years 2013 to 2024 and represents 48 total distributors (the "extrapolated sample"). This extrapolated sample represents roughly 62% of the total number of distributors in the Northwest. All results shared in this report are derived from the extrapolated sample and focus on years 2020 to 2024.[1]

FIGURE 1 2024 Unit Sales from Participating Distributors vs. Total Commercial Floor Space and Total Branches by State

This year, 22 Northwest distributors submitted sales data for 2024. **Figure 1** shows the share of collected 2024 unit (lamp and fixture) sales by state along with state shares of total commercial floor space and known distributor branch locations. The percentages of unit sales by state are approximately proportional to each state's share of regional commercial floor space and distributor branches, indicating that the participant sample is reasonably representative of the broader distributor population.



[1] The accompanying Aggregated Sales Data Results Spreadsheet contains data spanning 2013-2024.

FIGURE 2

Characteristics of Distributors Submitting 2024 Data Compared to the Extrapolated Distributor Sample and Pacific Northwest Distributor Population

Figure 2 shows the mix of participating distributors (participant sample) by relative size, distribution area, and business model, compared to both the mix of the 48 distributors participating over the 12 years of the study (extrapolated sample) and the mix of the population of distributors in the Northwest (population). The research team found that while the 2024 participants showed some variations compared to the distributor population, the full extrapolated sample (which includes the 2024 participants) is reasonably proportional to the Northwest distributor population.

Figure 2 Definitions

Size

Large - More than 10 branches in the Northwest.
Medium - Between 5 and 10 branches in the Northwest.
Small - fewer than 5 branches in the Northwest.

Distribution Area

Local - Small number of branches in a small geographic area, no larger than a single state.

Regional - Several branches across multiple states in the Northwest, few if any outside of the Northwest.

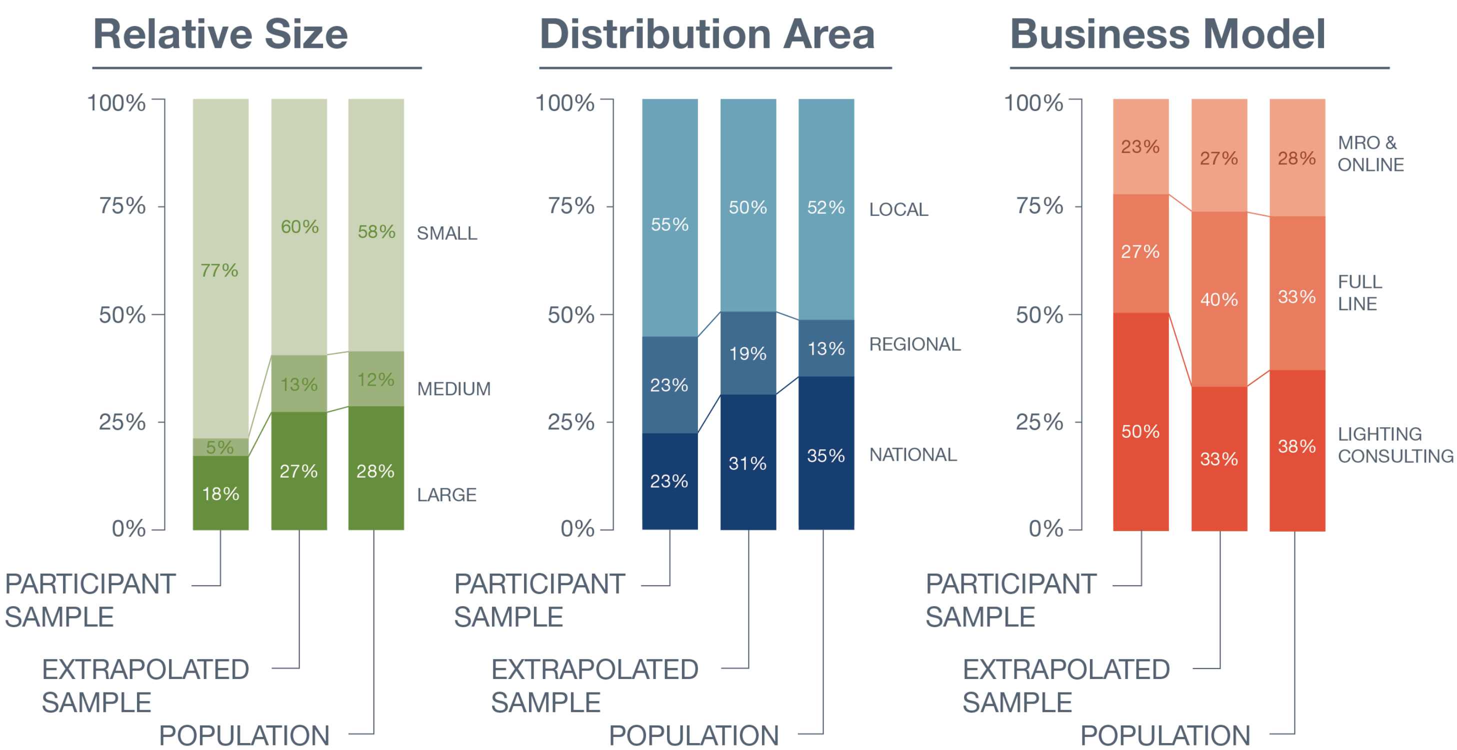
National - Several branches across the country, including the Northwest.

Business Model

Maintenance, repair and operations (MRO) and online distributors may sell lighting products only or a mix of lighting and other products with a focus on maintenance sales.

Full line distributors sell a variety of electrical products including lighting.

Lighting consulting distributors focus on energy efficiency products and project-based work. This project-based work includes new construction, renovation, and retrofit sales, and tends to focus on LEDs and lighting control products.



Survey Results

FIGURE 3 Percent of Unit Sales by Technology Type, 2020–2024

LEDs remained the largest technology segment of Northwest total unit sales in 2024 at 68%. The market share of linear fluorescents has been gradually decreasing since 2021, making up 23% of total unit sales in 2024.

From 2023 to 2024, the total volume of unit sales decreased, as did LED unit sales. The research team projects that both total unit sales and LED unit sales will continue to decline over time due to the extended lifetime of LEDs.

While sales volumes have seen variations over the past four years, the market share of all technologies remained relatively consistent. The research team anticipates that market shares will continue to experience incremental shifts to LEDs, although there is potential for larger shifts through market changes like the Oregon fluorescent ban going into effect in January 2025.

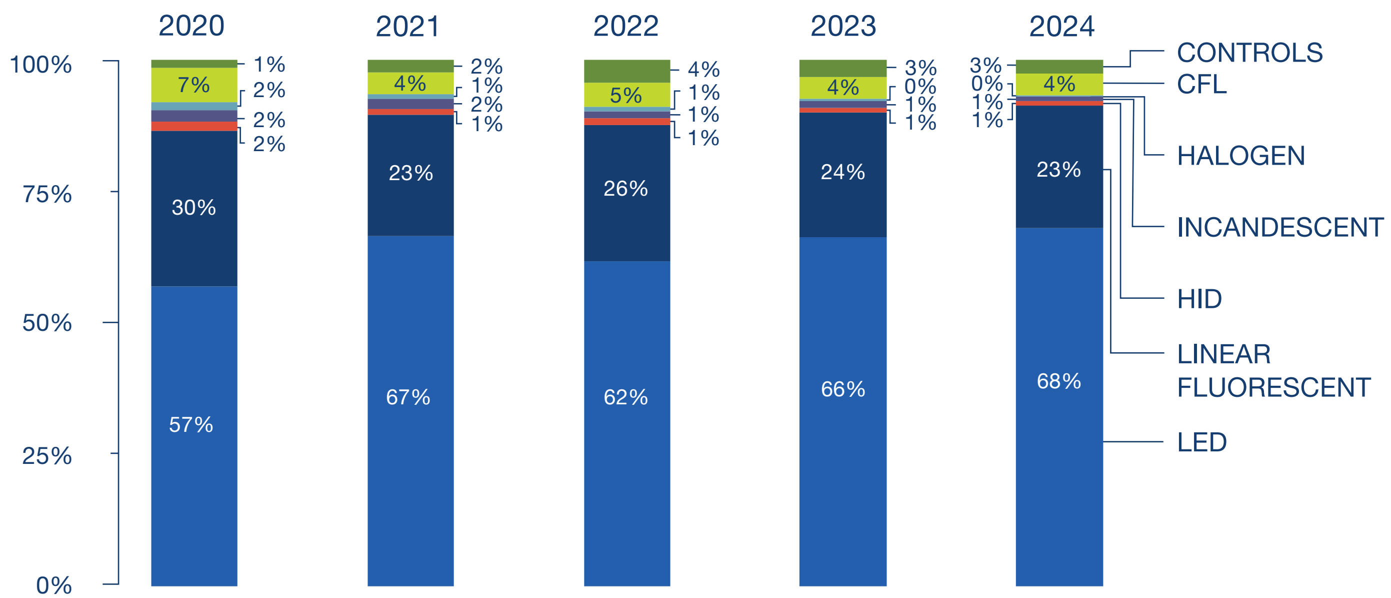


FIGURE 4 Percent of Unit Sales by Technology Type Across Business Models, 2020–2024

The technology sales mixes in 2024 for full line and for MRO and online look similar (compared to those for lighting consulting distributors) but these two business models have seen diverging trends since COVID-19. Among full line distributors, LEDs have gained market share, making up 72% of sales in 2024. Among MRO and online distributors, LEDs have slowly been declining since 2021 but saw an uptick in 2024, now making up 54% of sales. Conversely, linear fluorescents decreased to 36% in 2024, after gradually increasing over the past few years. The sales mix of lighting consultant distributors is distinct, with all lighting unit sales coming from LED technologies throughout 2020 to 2024. Lighting consulting distributors saw a large spike in controls sales in 2022, with controls making up 16% of total sales, likely due to an influx of controls projects in 2022. However, this sharply decreased to 2% in 2023 before slightly increasing to 3% in 2024. This brings sales back to levels typical for the business model and more closely aligns with the 3% market share for full-line distributors.

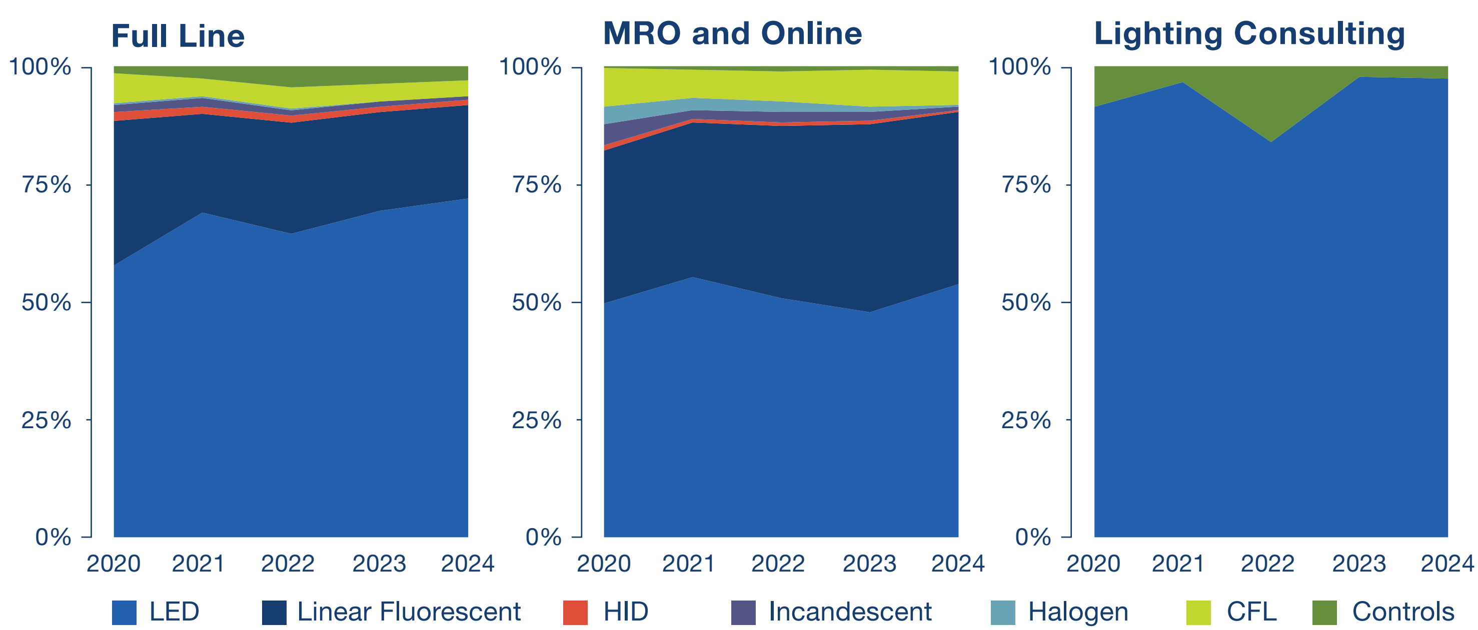


FIGURE 5 LED Percent Unit Sales, 2020–2024

The sales mix of LED technologies remained relatively stable between 2023 and 2024. In 2024, TLEDs continued to make up the largest portion of total LED unit sales at 44%, up from 41% in 2023. Indoor fixtures and A-Type LEDs both saw small decreases in sales mix from 2023 to 2024, now making up 16% and 11%, respectively. Other LED technologies (reflectors and downlights, outdoor fixtures, and decorative lighting) saw no change in sales mix from 2023 to 2024.

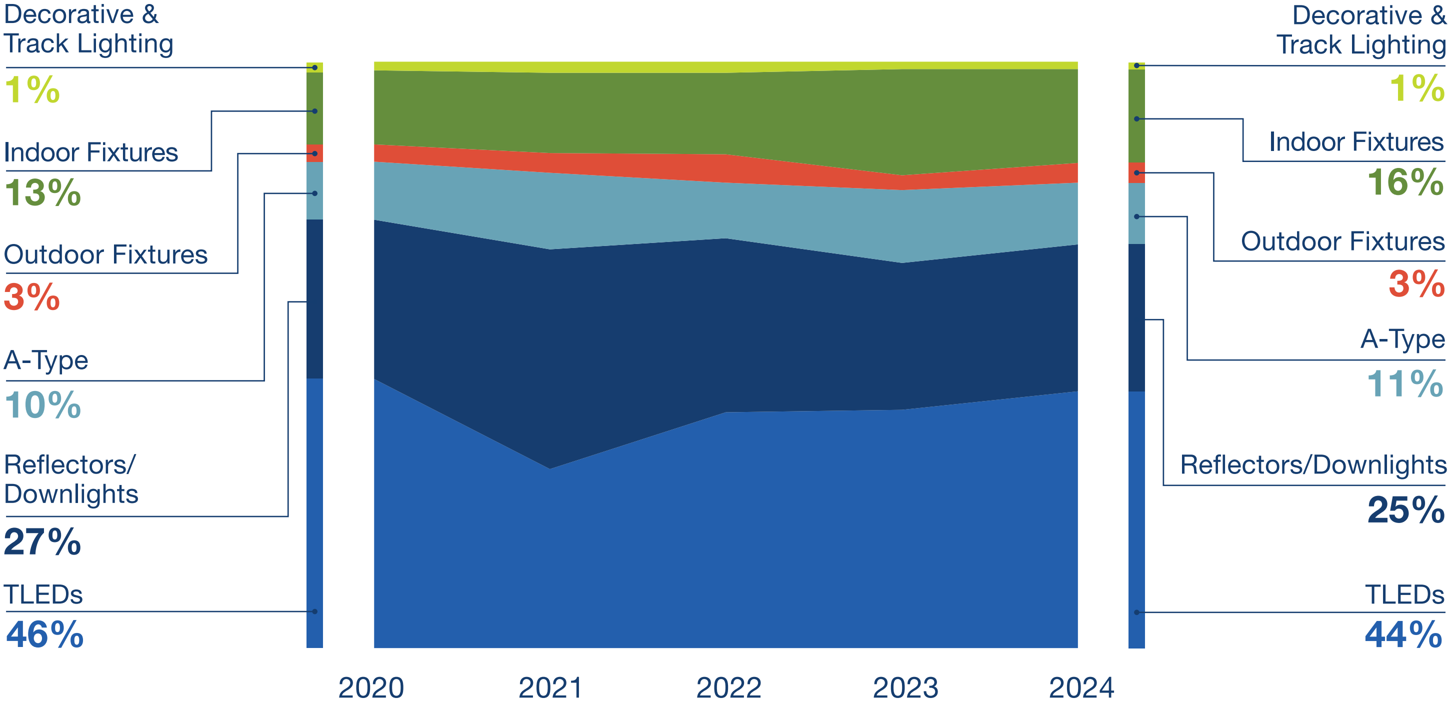


FIGURE 6 LED Penetration by Application, 2020–2024

As consistent with previous years, A-type lamps and reflectors showed the highest market penetration for LEDs compared to other lamp types in 2024 (at 90% and 95%, respectively). Out of lamp types with lower LED penetration (decorative and linear lamps), decorative lamps showed a large increase in LED penetration from 65% in 2023 to 79% in 2024, likely due to the continued evolution of LED design and increases in the types of form factors.

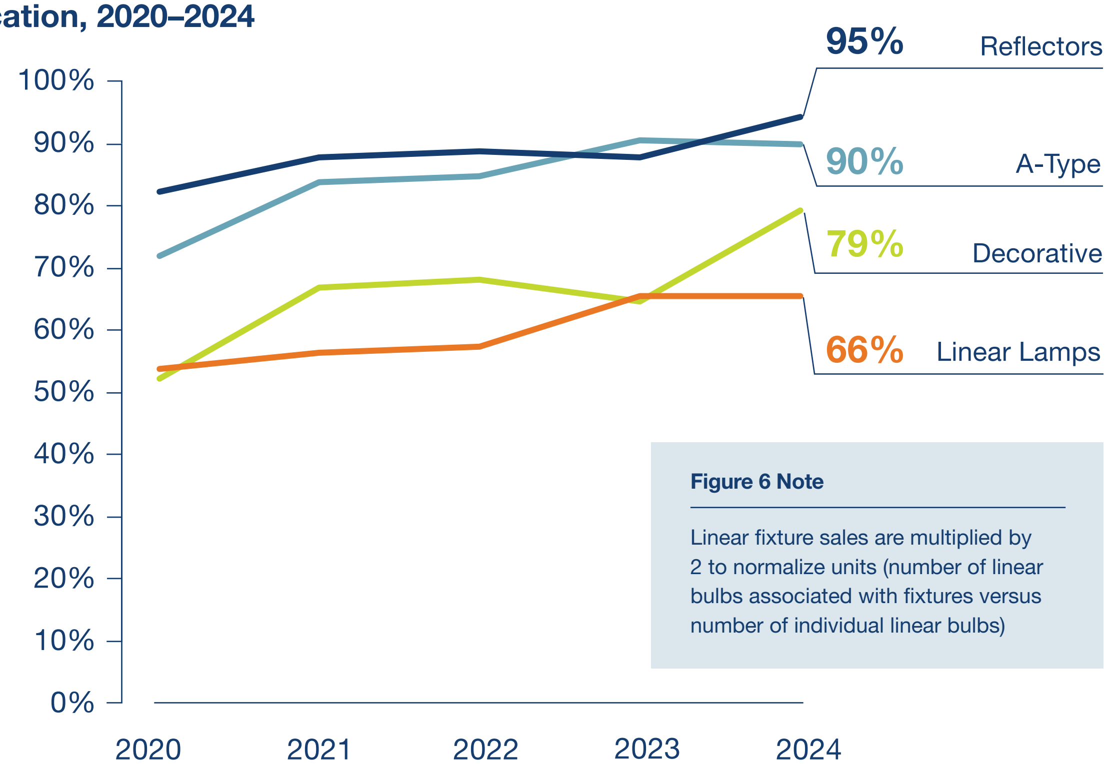


Figure 6 Note

Linear fixture sales are multiplied by 2 to normalize units (number of linear bulbs associated with fixtures versus number of individual linear bulbs)

FIGURE 7

Downlight Sales by Technology Type, 2020–2024

For the four downlight products shown, the sales mix continued to favor LED lamp and fixture alternatives over compact fluorescent lamp (CFL) pin-based lamps. LED technologies made up 78% of downlight applications in 2024, a slight increase from 77% in 2023. LED retrofit kits decreased from 34% of downlight sales in 2023 to 30% in 2024. LED fixtures hold the largest portion of the market with 40% of downlight sales.

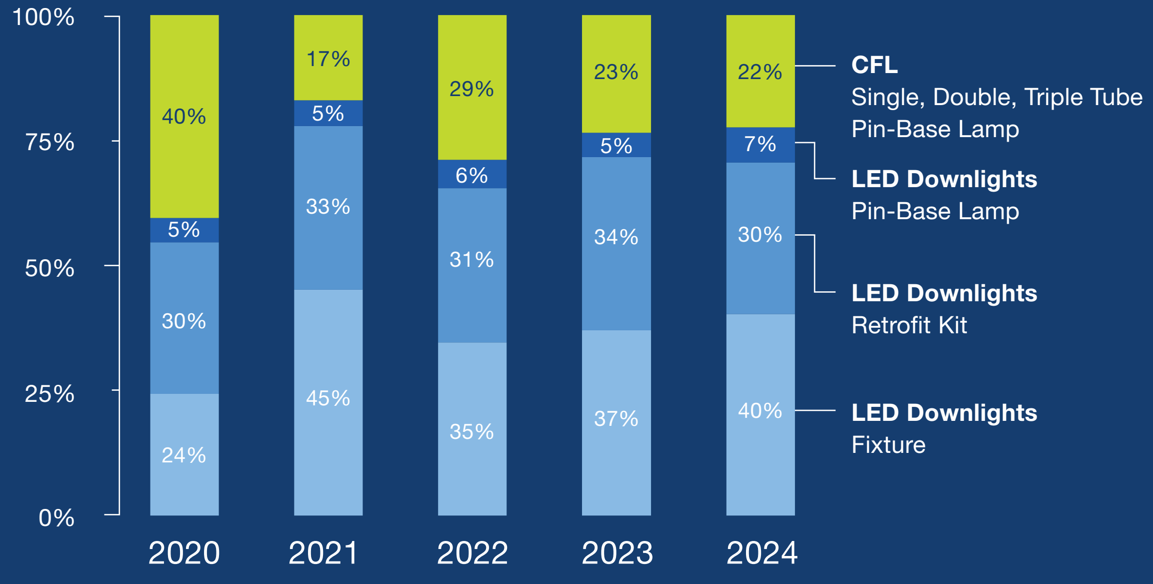


FIGURE 8

Percent Linear Lamp Sales by Type, 2020–2024

Among linear lamps, the sales mix between 4-foot T8 linear fluorescent lamps and TLEDs continued shifting towards TLEDs after the two technologies reached equal market share in 2022. In 2024, 4-foot T8 linear fluorescent lamps made up 44% of linear lamp sales and TLEDs made up 56%. Reduced wattage linear fluorescent lamp sales have steadily declined as LEDs gained market share and made up 13% of linear lamp sales in 2024. This trend corroborates insights shared by lighting manufacturers at the LightFair 2025 tradeshow, who noted that TLED sales remain strong. They also noted that among TLEDs, UL Type B continues to gain popularity over UL Type A. The sales data reflects this trend as well, showing UL Type B sales at 37% of linear lamp sales, compared to 11% for UL Type A. UL Type A+B represented 6% of the linear lamp category in 2024, while UL Type C represented 1% percent in 2024.

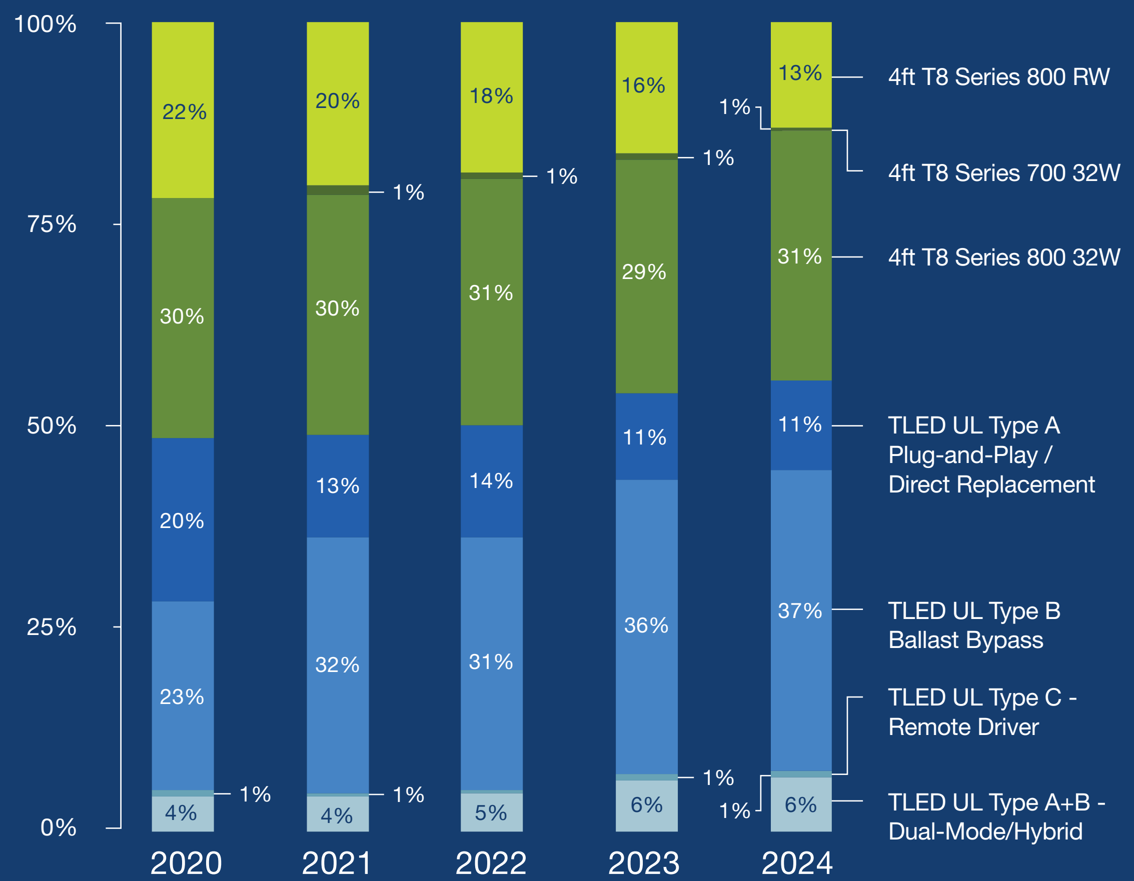
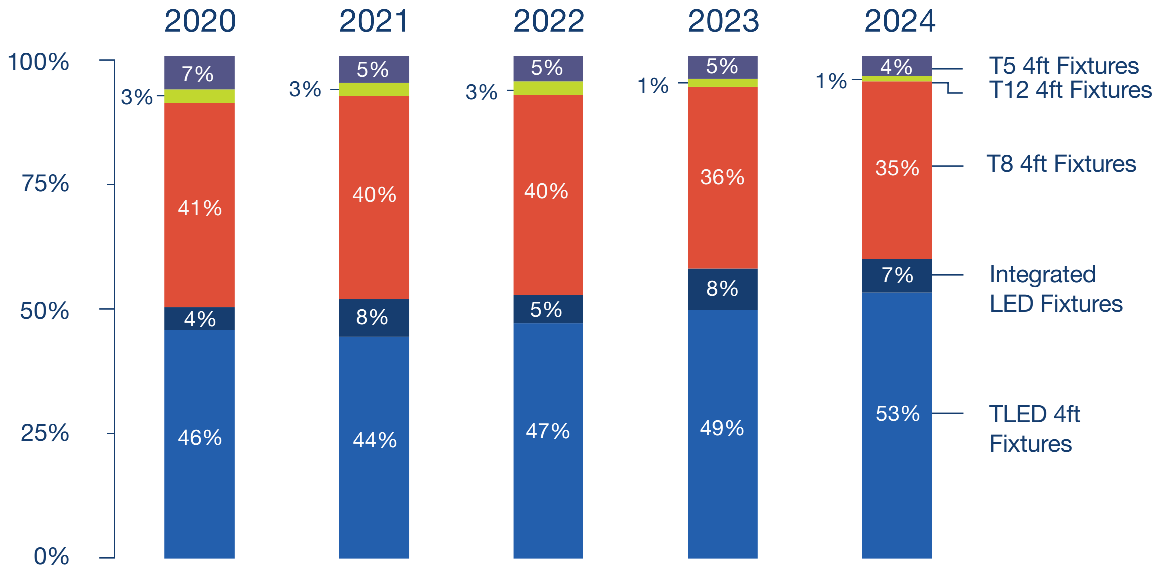


FIGURE 9

Percent of Ambient Linear Lamp and Fixture Sales by Type, 2020–2024

In the ambient linear application, LED products continued to replace linear fluorescent products. LED products reached more than half (52%) of sales in this application for the first time in 2021 and have grown to 60% in 2024. T12 four-foot sales shares remained the same from 2023 to 2024, while T8 four-foot and T5 four-foot sales shares slightly decreased. Integrated LED fixtures have stayed relatively flat in market share since 2020 and made up 7% of ambient linear lamp and fixture sales in 2024.

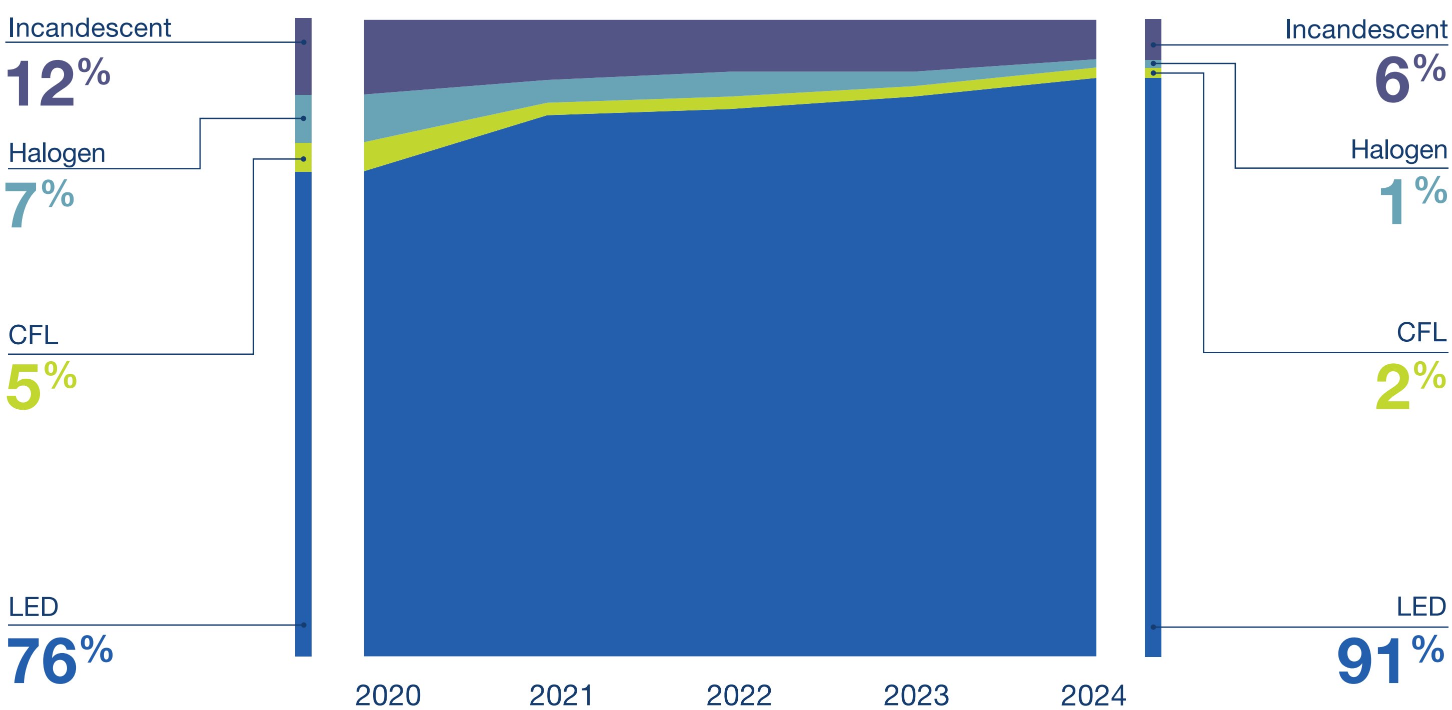


NOTE: Sales are normalized to an average of two lamps per fixture.

FIGURE 10

Screw-In Lamp Sales by Type, 2020–2024

Among screw-in products, LED products have consistently grown in market share since 2020 and held 91% market share in 2024. The market share of CFLs (2%) did not change from 2023 to 2024, while halogens continued to lose market share and account for a smaller portion of the sales mix each year. Incandescent products decreased slightly from 8% in 2023 to 6% market share in 2024, likely due to the US Department of Energy's backstop requirement for general service lamps (GSLs). This regulation, which went into effect in July of 2023, requires an efficacy of 45 lumens per watt for GSLs with few exemptions, effectively banning all non-LED products from the screw-in lamp market. The research team expects that incandescent products' market share will approach zero in the coming years.



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