



Annual Lighting Survey of Northwest Electrical Distributors 2025

September 2026



Report Highlights

80%

LED sales continued to rise in 2025, accounting for 80 percent of total unit sales. Up from a 70 percent market share in 2024, this represents the largest single-year jump in LED market share since 2016.

14%

Driven by Oregon's Jan. 1, 2025 ban on linear fluorescents, market share fell to an all-time low of 14 percent in 2025—down 10 points from 2024.

48%

TLEDs continue to be the most prevalent linear technology in the four-foot market with 48 percent market share. With the decline in linear fluorescents, integrated LED linear fixtures are also rising in popularity.

59%

Networked lighting controls made up 59 percent of all reported indoor controls sales in 2025, split between 42 percent networked sensors and gateways and 17 percent Luminaire Level Lighting Controls (LLLC).

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Report Overview

2025 PARTICIPANTS	IN DATASET YEARS COVERED	TOTAL DISTRIBUTORS	MARKET SHARE REPRESENTATION
22	2013 – 2025	48	~70%

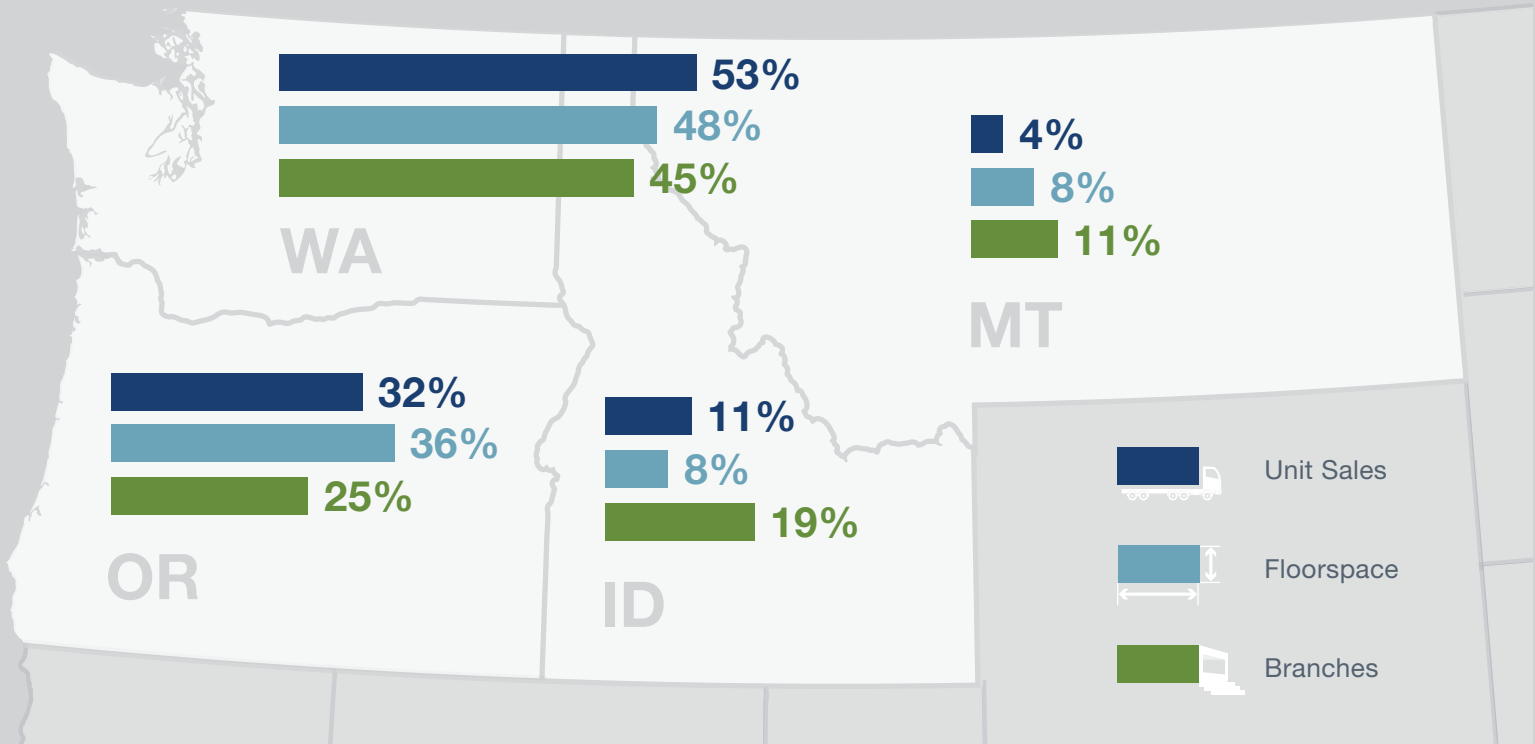
This report presents the results of the thirteenth annual Northwest Energy Efficiency Alliance (NEEA) and Bonneville Power Administration (BPA) Northwest Electrical Distributor Lighting Survey (lighting survey). The Resource Innovations team (research team) worked with NEEA program staff and Evergreen Energy Partners to recruit participants, successfully engaging 22 participants in the 2025 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 2025 and represents 48 total distributors (the “extrapolated sample”). This extrapolated sample represents roughly 70 percent of the total number of distributors in the Northwest. All presented survey findings are derived from the extrapolated sample except if noted otherwise. Qualitative findings are the result of follow-up interviews with seven distributors. While the full data set spans 2013-2025, this report presents findings from more recent years.¹

FIGURE 1 Oregon, Washington, Idaho, and Montana Bound Lamp Shipments from 2025 Participating Distributors vs. Total Commercial Floor Space and Total Branches by State

Figure 1 shows the share of collected 2025 unit (lamp and fixture) sales from participating distributors going to each Northwest 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.



Source: 2025 distributor sales data analysis, 2019 Commercial Building Stock Assessment (CBSA) floor space by state, and 2026 BPA distributor database.

Unit sales are derived from the 2025 participant sample (n=22).

¹The accompanying Aggregated Sales Data Results Spreadsheet contains data spanning 2013-2025.

FIGURE 2

Characteristics of Distributors Submitting 2025 Data Compared to the Extrapolated Distributor Sample and 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 13 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 2025 participants showed some variations compared to the distributor population, the full extrapolated sample (which includes the 2025 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.

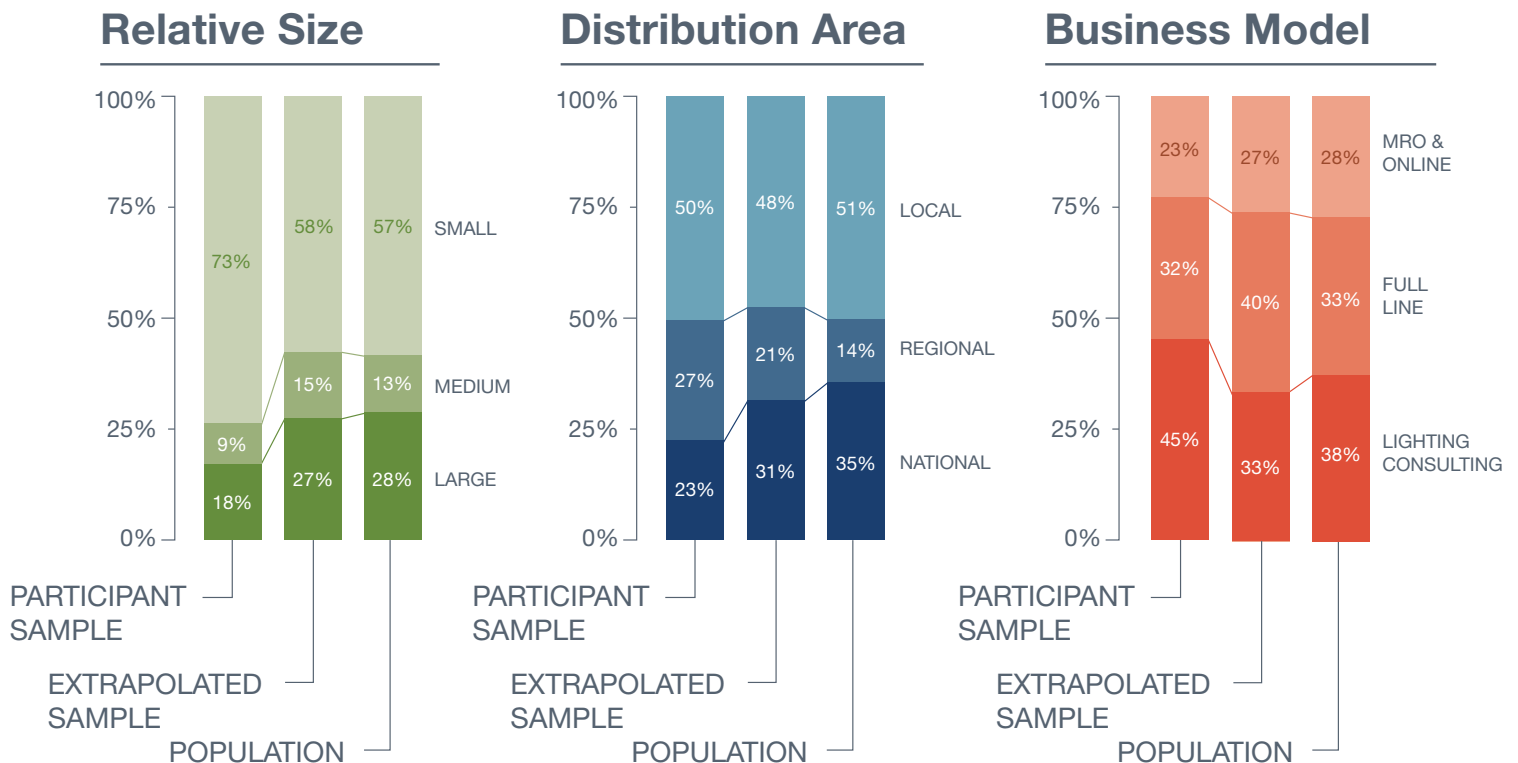
National - Several branches across the country, including the Northwest.

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.



Participant Sample (n=22), Extrapolated Sample (n=48), Known NW Distributor Population (n=69)

Survey Results

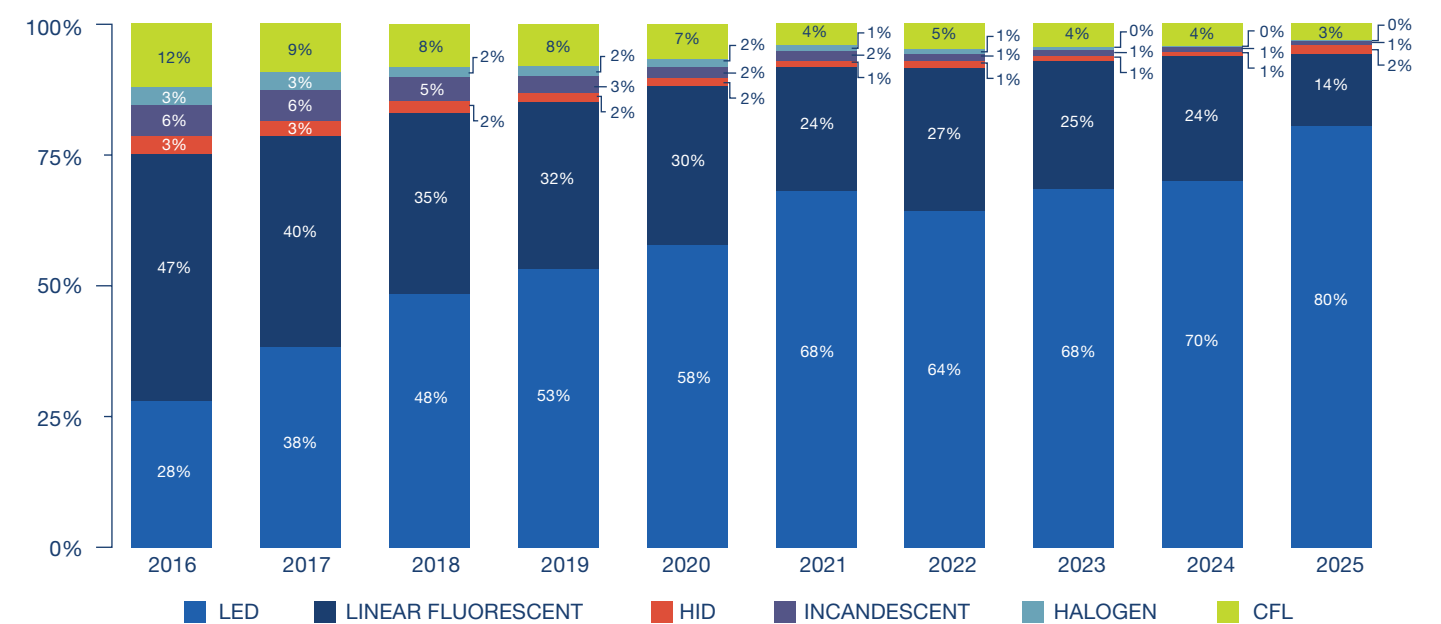
FIGURE 3 Percent of Unit Sales by Technology Type

The Oregon fluorescent ban is impacting the Northwest market. Since 2021, linear fluorescents have accounted for approximately a quarter of total annual sales, but in 2025, after Oregon’s ban went into effect, linear fluorescent market share dropped to 14 percent of total sales. Distributors confirmed this shift, reporting steep declines in linear fluorescent sales in 2025 and noting that fluorescents were already trending downward ahead of the ban.

The ban has also contributed to a jump in LED sales. Despite seeing a slow, steady increase in LED market share year over year, the increase in LEDs from 70

percent to 80 percent of total sales is one of the largest increases observed in the past ten years. A similar fluorescent ban in Washington that goes into effect in 2029 will strengthen this trend.

In 2025, the total volume of unit sales increased after an all-time low in 2024. According to interviews with distributors, the variable sales volumes from year to year are impacted in part by macroeconomic factors such as tariffs and construction spending. Distributors noted that while the market has generally stabilized in 2025, it has not fully rebounded and large commercial projects in city centers remain down.



Fluorescent Bans in the Northwest

Oregon enacted a phased ban on the sale of fluorescent lighting products, beginning with screw-base CFLs in January 2024 and extending to pin-base CFLs and linear fluorescent lamps (LFLs) in January 2025. Washington has passed a similar ban on CFLs and LFLs, set to take effect January 1, 2029.

These policies are reshaping the linear fluorescent and CFL markets across the region, a shift reflected both in the sales data throughout this report and in follow-up interviews with lighting distributors (see Qualitative Findings below).

- Washington CFL and LFL ban (effective January 1, 2029)
- Oregon CFL Screw Ban (effective January 1, 2024)
- Oregon CFL Pin Base and LFL Ban (effective January 1, 2025)

Qualitative Findings on the Impact of the 2025 Oregon Fluorescent Ban

In 2025, a ban on the sale of fluorescent lighting products went into effect in Oregon. To add context to the sales data and better understand how the ban is affecting distributors and shaping broader market trends, the research team conducted 7 follow-up interviews with a subset of the 22 distributors that participated in the 2025 survey. These 7 distributors have historically reported sales of fluorescent products, and most also sell in Oregon.

- Every distributor interviewed reported that their overall linear fluorescent and CFL sales declined meaningfully between 2024 and 2025. While most attributed a sizable portion of this decline to the Oregon ban, many also noted that fluorescents were already on a downward trajectory before the ban took effect, and several expect the technology to be phased out nationally within the next few years. This shift was reflected in distributors' stocking decisions: several had already begun reducing or discontinuing fluorescent inventory ahead of the ban, independent of any regulatory requirement, citing declining customer demand.
- Most distributors are not taking formal steps to prepare for Washington's upcoming 2029 fluorescent ban, with a few noting they do not plan to change their approach until it takes effect. One distributor reported they would be proactively communicating with their customers, but this was not the case among most distributors. Several noted that they expect to have already phased out most of their fluorescent stock by then regardless, driven more by declining demand than by the impact of legislation.
- Distributors were asked to estimate the portion of their linear fluorescent, LED, and CFL sales that went to each Northwest state in 2025. Several distributors were unable to parse their sales this granularly. Among distributors who did report a breakdown, none showed any linear fluorescent or CFL sales into Oregon in 2025. Washington accounted for the largest share of linear fluorescent and CFL sales for most distributors, though some reported sales to Idaho and Montana as well. Overall, interviewed distributors also noted declines in fluorescent sales in other Northwest states, though many attributed this to growing LED reliability and shifting customer preferences rather than the Oregon ban itself.
- In general, distributors reported that TLEDs remain the most common replacement for linear fluorescents, but several noted growing interest in full fixture retrofits, particularly among commercial customers seeking long-term flexibility. Distributors also described a split between cost-sensitive customers gravitating toward TLEDs and more sophisticated commercial customers opting for comprehensive fixture upgrades.
- Awareness of Oregon's recently-passed exemption for large facilities (over one million square feet) was limited among distributors, and most did not expect it to meaningfully change their stocking decisions going forward. Several distributors also raised questions about how compliance with the exemption would be verified, given the lack of clear documentation requirements. One distributor cited the exemption as evidence of a lack of commitment to efficiency and was critical of the confusing guidance surrounding it.
- The research team also examined distributor sales data for those with a meaningful share of Oregon sales (defined as greater than 40 percent of total sales going to Oregon) and those with no reported Oregon sales. Distributors with a meaningful share of Oregon sales saw a 59 percent decrease in LFL sales, while those with no reported Oregon sales saw a 20 percent drop in LFLs. This gap suggests the ban is driving the large decline in Oregon-facing distributors' fluorescent sales beyond the broader decline already underway across the region.

“It's just a matter of time before it's gone. Why would I want to be stuck with LFLs?”

“People are starting to realize they're living in the past [with LFLs]”

“Oregon doesn't stick to its guns.”

NOTE: This analysis was completed to illustrate directional impact of the ban only; use caution if deriving inputs or making assumptions for state-specific analyses, as precise state-level sales data was limited.

FIGURE 4 Percent of Unit Sales by Technology Type Across Business Models

Among the three business models, technology sales mixes vary. Full line distributors saw a large increase in LED sales from 74 percent in 2024 to 86 percent in 2025, after more modest increases since 2022. The increase in LEDs came at the expense of linear fluorescents which dropped from 20 percent of sales in 2024 to 9 percent in 2025. Among MRO and online distributors, linear

fluorescents' share of sales also decreased but the drop was less significant (from 37 percent in 2024 to 33 percent in 2025). LEDs' share of sales peaked for MRO and online distributors in 2025 at 59 percent. The sales mix of lighting consultant distributors is distinct, with all lighting unit sales coming from LED technologies throughout 2022 to 2025.

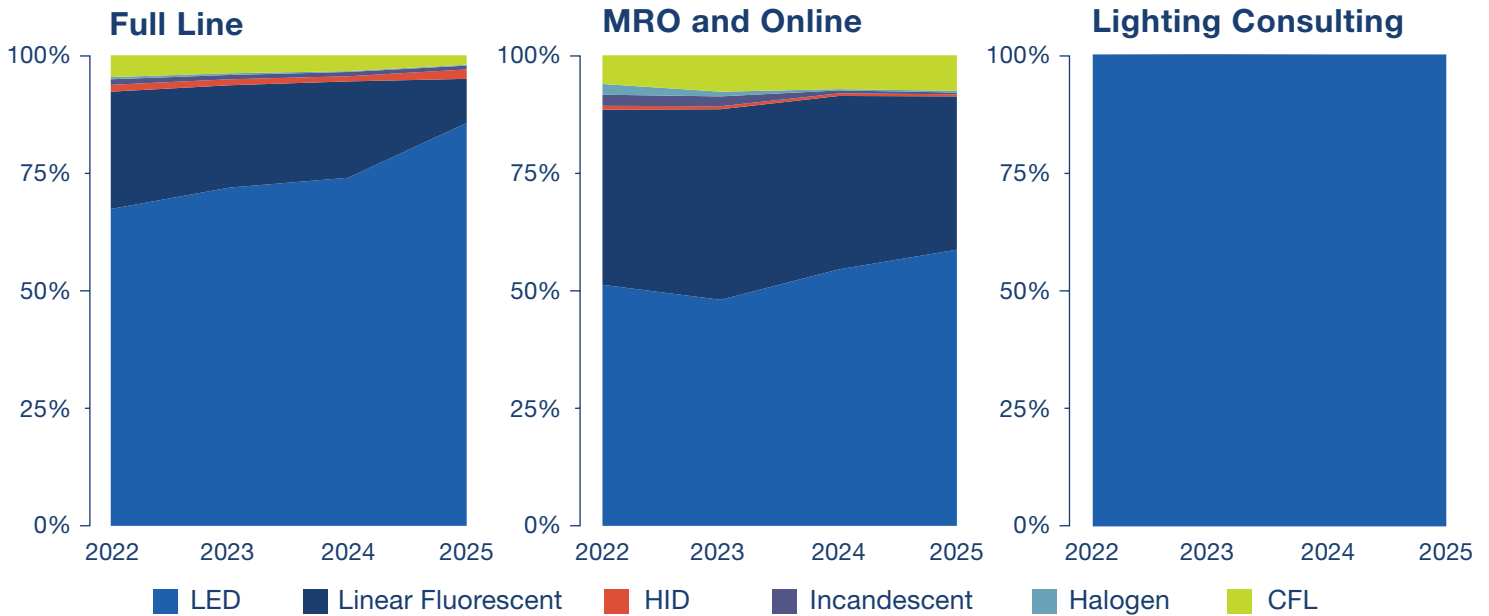


FIGURE 5 Total Sales Volumes by Business Model

Changes in sales volumes varied by business model as well; full line distributors saw a 17 percent increase in total unit sales, while MRO and online saw a decrease of 18 percent. Lighting consultants also experienced a decrease in total sales from 2024 to 2025. Distributor interviews suggest MRO and online distributors may

have been more impacted by the Oregon ban, given that these business models have traditionally sold a higher share of fluorescent products. Distributors also reported that the loss of utility rebates for LEDs played a role in lower overall sales in Oregon.

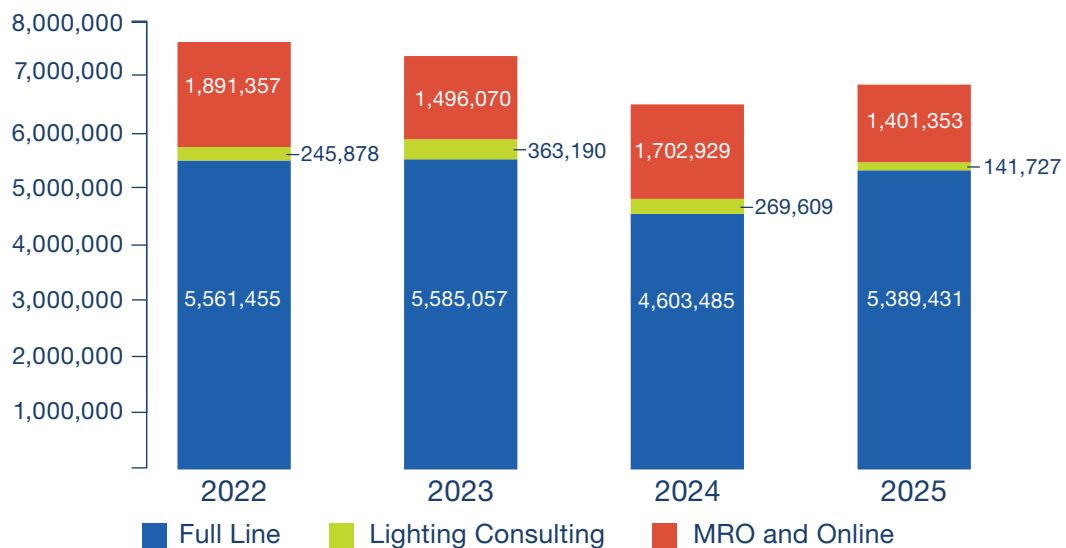


FIGURE 6 LED Percent Unit Sales

Within LED sales, the technology shares remained relatively stable between 2024 and 2025. In 2025, TLEDs continued to make up the largest portion of total LED unit sales at 36 percent, despite a drop from 44 percent in 2024. Reflectors/downlights and outdoor fixtures both saw increases in sales mix from 2024 to 2025, now making up 32 percent and seven percent of sales respectively. Other

LED technologies (A-type, high bay and low bay, indoor fixtures, linear fixtures and decorative lighting) saw little or no change in their relative share of LED sales from 2024 to 2025, though within the linear application specifically, there was an increase in the share of linear LED fixtures compared to fluorescents (See Figure 9).

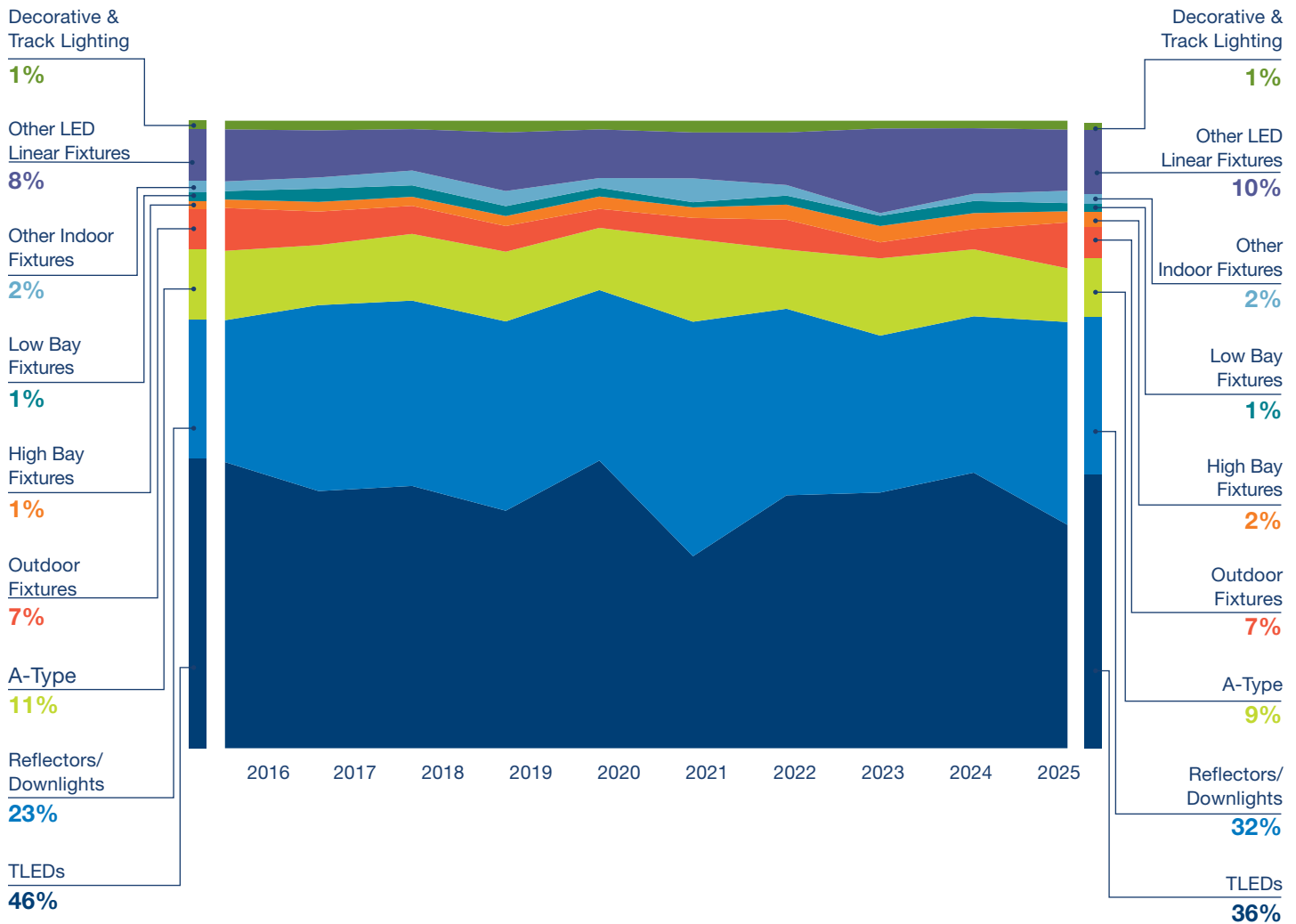


FIGURE 7

LED Penetration by Application

In 2025 LEDs dominated sales in all applications. The Oregon fluorescent ban coincided with a 10 percentage point increase in LED penetration in the linear application, bringing LED technology up to 76 percent of all linear sales. As consistent with previous years, A-type lamps and reflectors showed the highest market penetration of LEDs compared to other lamp types in 2025 (at 92 percent and 94 percent, respectively), with the decorative application not far behind, with 85 percent LED penetration in 2025.

The shift to LEDs in all applications over the past nine years has been dramatic. LEDs have gained the most market share in the decorative application, increasing 65 percentage points. The transformation of linear lamps has lagged behind other applications, going from 27 percent LED penetration in 2016 to 76 percent in 2025. However, regulations in Northwest states will only increase LED sales in this application as consumers seek out simple, affordable replacements for linear fluorescents.

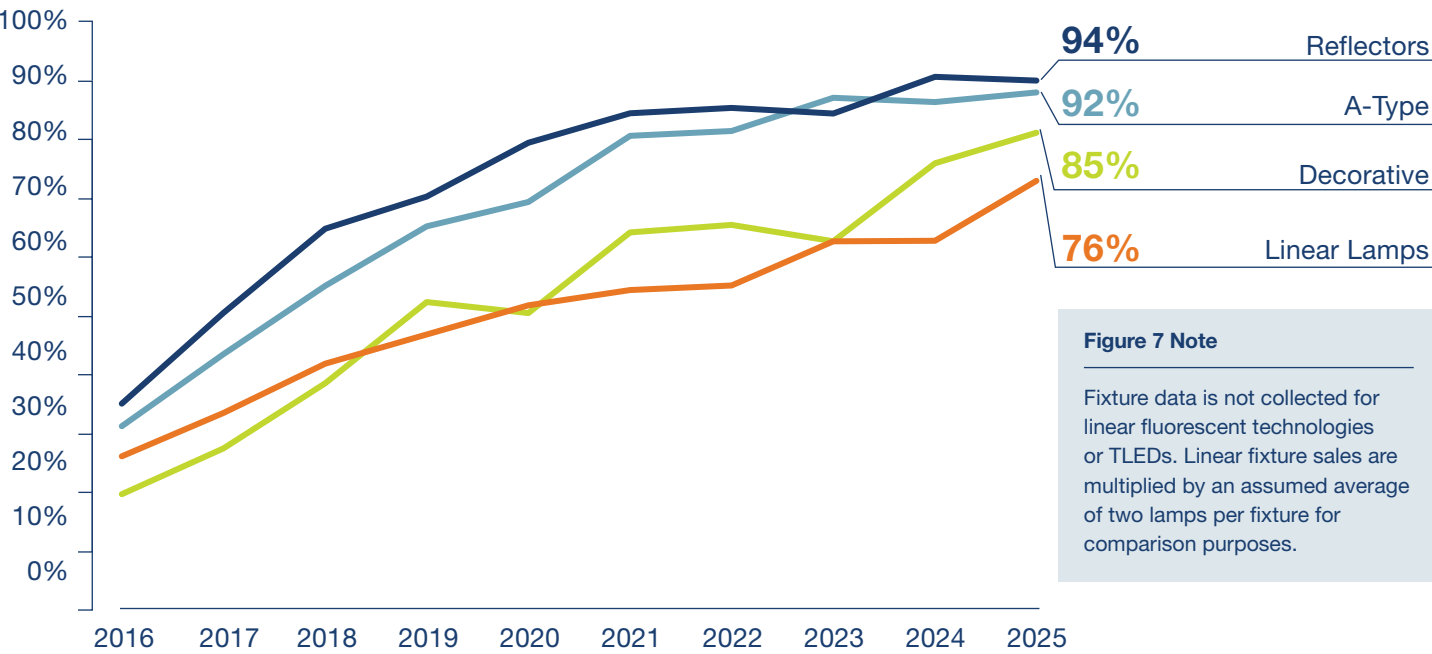


FIGURE 8 Downlight Sales by Technology Type

For the four downlight products shown, the sales of LED lamp and fixture alternatives are strong compared to compact fluorescent lamp (CFL) pin-based lamps. LED technologies made up 88 percent of downlight applications in 2025, a 10-point increase from 78 percent in 2024. Oregon banned the sale of screw-in CFLs in 2024 and pin-based CFLs in 2025. CFL sales share held relatively steady following the 2024 screw-in ban, but dropped notably in 2025 after the pin-based ban took effect, suggesting the pin-based ban had a more immediate impact on downlight sales than the earlier screw-in restriction. CFLs are now at an all-time low of 12 percent of downlight sales for the region in 2025.

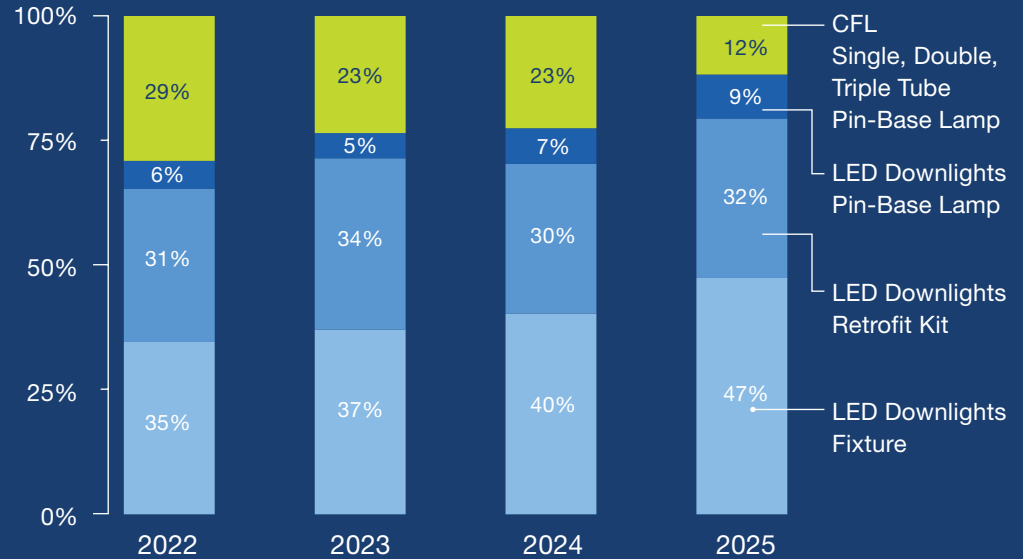


FIGURE 9 Percent of Ambient Linear Fixture Sales by Type

In the ambient linear application, integrated LED fixtures and TLEDs continue to replace linear fluorescent products. LED products (lamps and fixtures) reached more than three quarters (77 percent) of sales in this application in 2025, reflecting an increase in market share of 11 percentage points over 2024. Notably, integrated fixtures now account for 29 percent of total fixture sales. Four-foot T8 fixtures saw a large drop in sales, accounting for 20 percent of linear fixture sales in 2025. This drop is likely driven by Oregon's linear fluorescent ban. Several distributors confirmed retiring T8 fixture inventory in favor of integrated LED and TLED-compatible alternatives as the fluorescent stock is phased out.

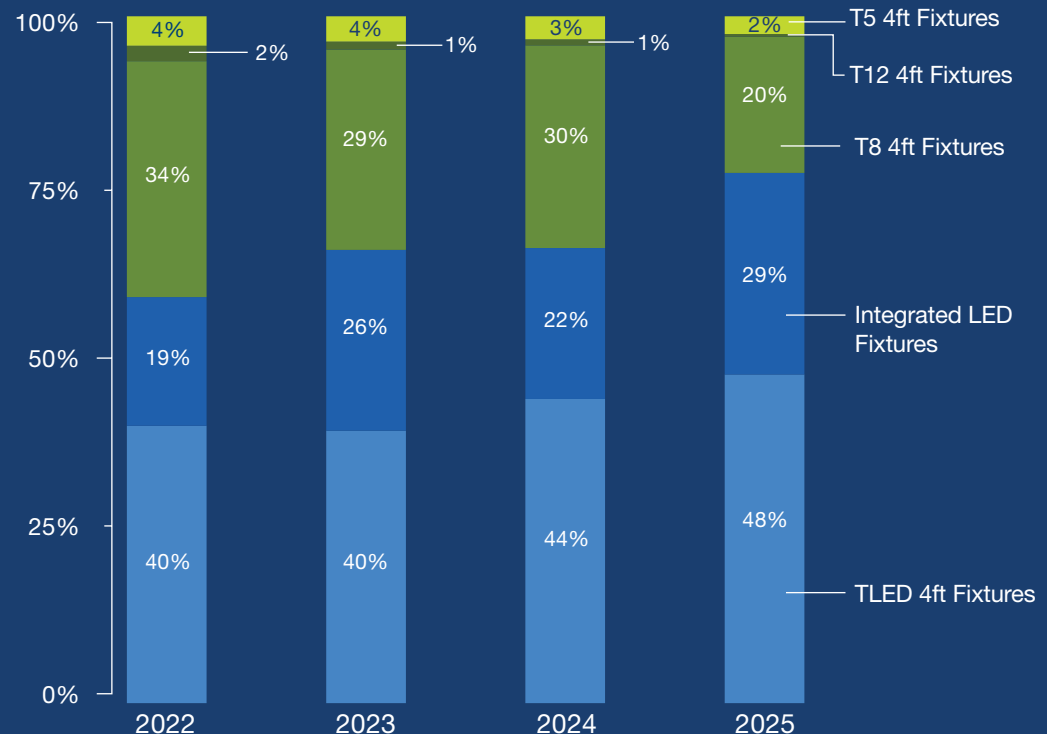


Figure 9 Note

Fixture data is not collected for linear fluorescent technologies or TLEDs. Lamp sales of these technologies are normalized to an assumed average of two lamps per fixture for comparison purposes.

FIGURE 10 Percent 4ft Linear Lamp Sales by Type

Focusing in on linear lamps, the sales mix between four-foot T8 linear fluorescent lamps and TLEDs continued shifting towards TLEDs, a change from 2022 when the two technologies held equal market share. In 2025, four-foot T8 linear fluorescent lamps made up 33 percent of linear lamp sales and TLEDs made up 67 percent. Reduced wattage linear fluorescent lamp sales have steadily declined as LEDs gain market share. 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 reflect this trend as well, showing UL Type B sales at 46 percent of linear lamp sales, compared to 12 percent for UL Type A and smaller shares for other TLED types.

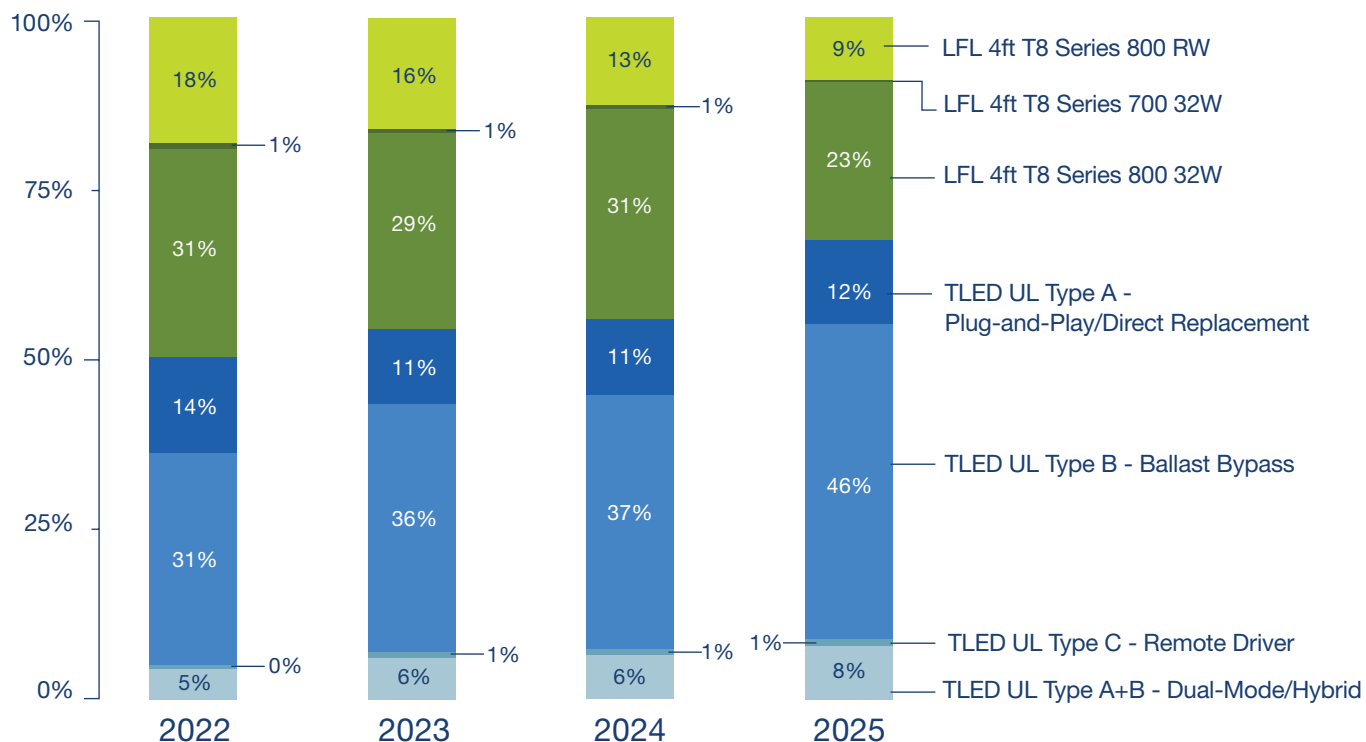


FIGURE 11

Percent of Indoor Controls Sales by Type

Indoor networked controls made up the majority of controls sales in 2025, with LLLC fixtures and networked sensors and gateways making up a combined 59 percent of indoor controls sales in 2025 – a significant market shift in just three years, when these networked controls only made up 24 percent of the controls market in 2022. Non-networked, non-embedded sensors made up 30 percent of controls sales in 2025, a lower percentage than in previous years. LLLC represented 17 percent of indoor controls sales, whereas standalone controls made up 11 percent and have historically made up a smaller portion of overall controls sales than LLLC. Distributors noted that, when properly commissioned and zoned, LLLC delivers the most value of all controls options. Distributors also reported that they recommend LLLC for a variety of indoor applications, though they are generally best suited to customers with the technical staff or sophistication to manage more complex systems. Standalone embedded controls, by contrast, offer simpler installation and operation without the need for network commissioning, making them a preferred option for more straightforward indoor projects where full networking capability isn't necessary. Distributors reported that pricing between the two options is generally comparable, suggesting that project complexity and customer sophistication, rather than cost, are the primary factors driving the choice between them.

Controls Definitions

LLLC fixtures (Luminaire Level Lighting Controls):

Fixtures with embedded, networked controls including occupancy and daylight sensing built directly into the luminaire.

Networked sensors and gateways:

Sensors, gateways, and other components that connect to and communicate within a networked lighting control system, but are not themselves part of an LLLC fixture. These work alongside LLLC or other networked systems to extend sensing and control capability across a space.

Standalone embedded controls (non-networked):

Controls built directly into a fixture with no networking capability. These can also be referred to as luminaires with integral sensor functions.

Sensors (non-embedded, non-networked):

Standalone sensors, such as occupancy or vacancy sensors, wallbox controls, or photocells, that operate independently, are not built into a fixture, and don't communicate with other devices on a network.

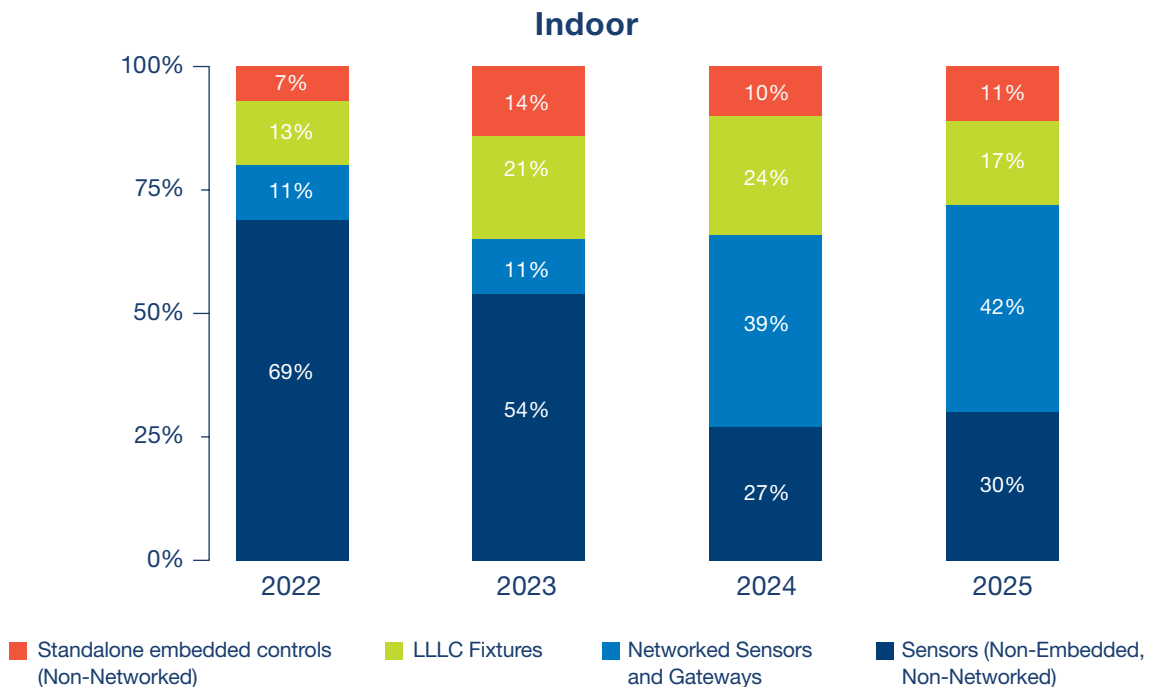


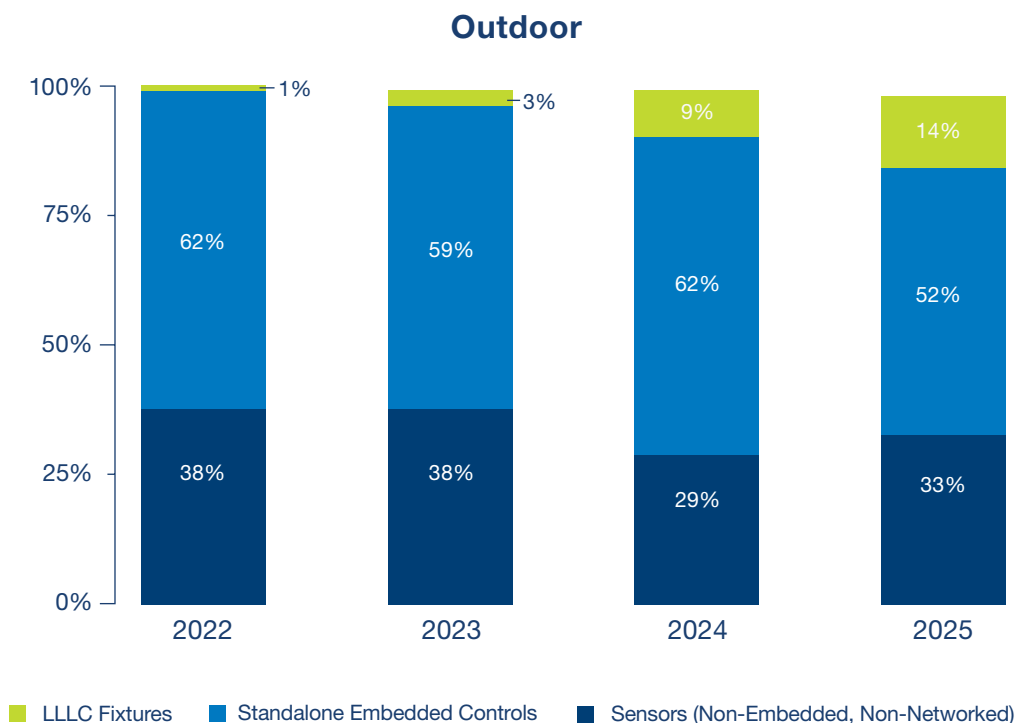
FIGURE 12 Percent of Outdoor Controls Sales by Type

Outdoor

Among outdoor lighting controls, standalone (non-networked) embedded controls remained the largest category of sales from 2022–2025. Outdoor LLLC fixtures made up 14 percent of all outdoor controls sales reported in 2025. Non-embedded non-networked sensors' market share has held relatively consistent, making up 33 percent of outdoor controls sales in 2025. This corroborates findings from interviews with lighting distributors; distributors noted that networked lighting controls are challenging for exterior applications because there are more obstructions that can interfere with their ability to communicate. Additionally, they mentioned that the level of sophistication provided by LLLC often feels excessive for outdoor uses and standard sensors are generally sufficient. Despite this, LLLC saw an 11-point increase in market share of the outdoor controls market in just two years, indicating that this technology is rising in popularity but not as rapidly as indoor applications.

Note:

Controls sales are not extrapolated; all data reflects actual reported sales from the 22 distributors that participated in the 2025 survey. Because the distributors reporting controls data can vary from year to year, and small shifts in the participant pool can meaningfully affect the reported market share of controls types, users of this data should exercise caution when comparing controls trends across years.





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