

November Quarterly Call

Momentum Savings & Market Research

November 4, 2026

Agenda

1. Introductions and ice breaker
2. 2025 Nonresidential Lighting Sales Data Update
   - Methodology
   - Detailed Findings

Market Research Team



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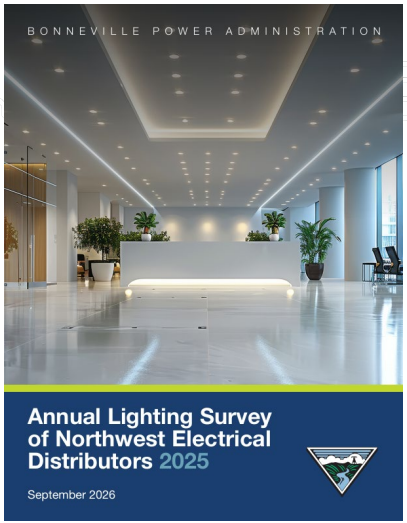


Name, Org, + Answer This Question:

What is your favorite Thanksgiving dessert?

2025 Nonresidential Lighting Sales Data Resources

Report and full category sales dataset are available on Bonneville's website:



[Report Link]

Total Sales by Lamp Type

This table presents the total sales with linear adjustment for each year, distributor type, and unique technology. Unique technologies are categorized by their technology type (e.g., CFL, LED), general category (e.g., A-Type, TLED), dimension (4ft or 8ft, where applicable), subcategory (e.g.32W, high output, etc.), and base type (e.g., Pin-Base, fixture).

Lighting_Technology_Typ	General_Category	Dimension	Subcategory	Base_Type	2013	2014	2015
CFL	A-Type	(blank)	100W Incandescent Equivalent	Screw-Base Lamp	95,161	44,256	35,658
CFL	A-Type	(blank)	40W Incandescent Equivalent	Screw-Base Lamp	7,110	5,004	2,552
CFL	A-Type	(blank)	60W Incandescent Equivalent	Screw-Base Lamp	63,940	75,358	99,033
CFL	A-Type	(blank)	75W Incandescent Equivalent	Screw-Base Lamp	3,733	10,265	9,303
CFL	Decorative	(blank)	(blank)	Screw-Base Lamp	20,355	2,967	1,957
CFL	Flood Light	(blank)	(blank)	Fixture	10,954	1,532	1,234
CFL	Reflectors	(blank)	Other Reflectors	Screw-Base Lamp	3,375	6,263	469
CFL	Reflectors	(blank)	PAR	Screw-Base Lamp	10,605	9,261	1,457
CFL	Reflectors	(blank)	R/BR	Screw-Base Lamp	84,161	70,620	75,812
CFL	Single, Double, Triple Tube	(blank)	<20W	Pin-Base Lamp	171,639	296,058	285,721
CFL	Single, Double, Triple Tube	(blank)	>=20W	Pin-Base Lamp	200,293	308,629	209,786
CFL	Spiral GU24 Base Type	(blank)	<20W	Pin-Base Lamp	12,959	19,502	20,112
CFL	Spiral GU24 Base Type	(blank)	>=20W	Pin-Base Lamp	2,035	4,878	6,204
HID	High Pressure Sodium	(blank)	<=400W	Mogul-Base Lamp	88,294	123,057	115,184
HID	High Pressure Sodium	(blank)	>400W	Mogul-Base Lamp	7,801	9,391	4,567
HID	Mercury Vapor	(blank)	<=400W	Mogul-Base Lamp	7,306	5,738	4,202
HID	Mercury Vapor	(blank)	>400W	Mogul-Base Lamp	119	275	87
HID	Metal Halide	(blank)	<=400W	Mogul-Base Lamp	161,823	197,226	183,537
HID	Metal Halide	(blank)	>400W	Mogul-Base Lamp	13,824	19,730	10,361
Halogen	A-Type	(blank)	100W Incandescent Equivalent	Screw-Base Lamp	3,928	5,401	7,940
Halogen	A-Type	(blank)	40W Incandescent Equivalent	Screw-Base Lamp	384	3,306	2,139
Halogen	A-Type	(blank)	60W Incandescent Equivalent	Screw-Base Lamp	1,317	11,206	20,024
Halogen	A-Type	(blank)	75W Incandescent Equivalent	Screw-Base Lamp	589	1,808	3,441

[Dataset Link]

Methodology

- Annual collaboration with Northwest Energy Efficiency Alliance (NEEA) to conduct a survey of a static panel of Northwest Distributors to gather sales data.

22
Contacted 48 distributors, 22 submitted 2025 sales data

48
Total distributors in the extrapolated sample

~70%
Estimated share of the NW distributor market represented

7
In-depth interviews with distributors to explore OR ban

All quantitative findings are derived from the extrapolated sample unless otherwise indicated.
**Controls data is not extrapolated and reflects only reported sales.*

Research Team:
Resource Innovations
Evergreen Energy Partners



LED Market Share

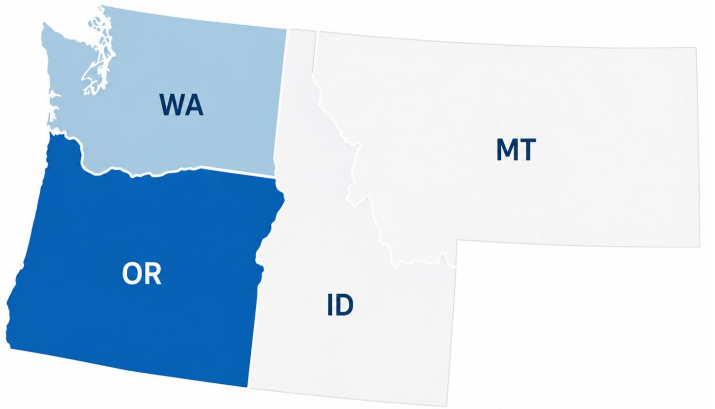
Regulatory Context

2023 OR and WA high-CRI LFL efficacy requirements.

2024 Oregon CFL screw-base ban.

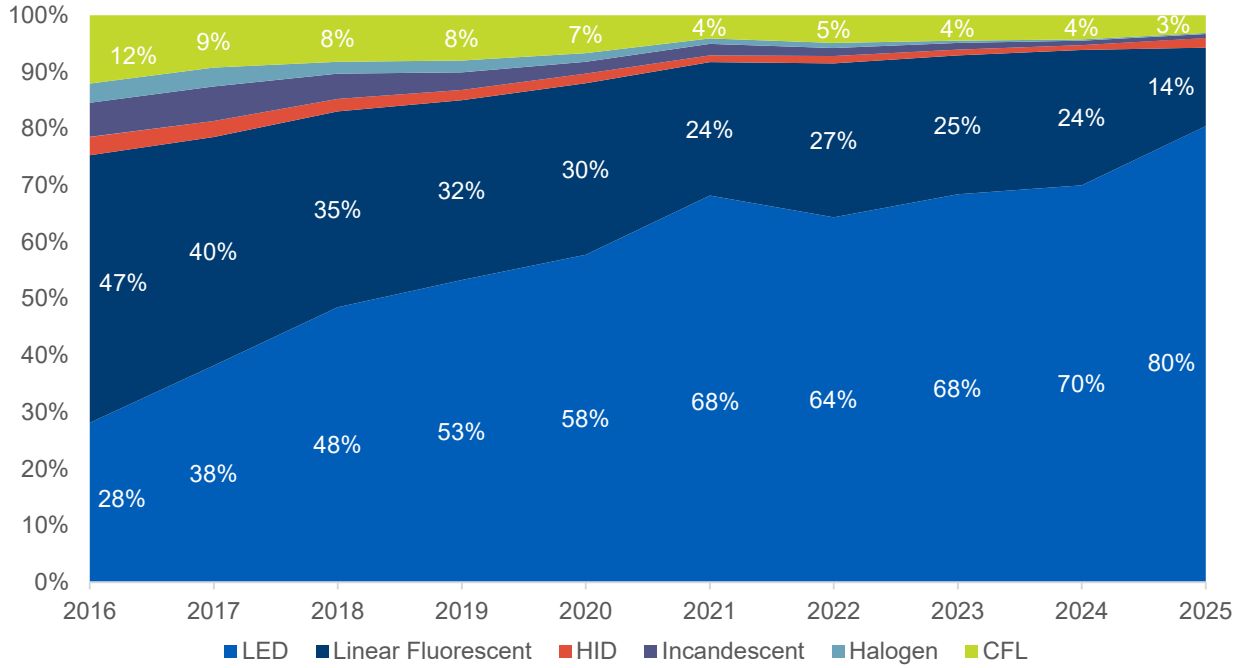
2025 **Oregon CFL pin-base and linear fluorescent ban takes effect.**

2029 Washington CFL and linear fluorescent ban takes effect.



GSL: General Service Lamp
CRI: Color Rendering Index
CFL: Compact Fluorescent Lamp
LFL: Linear Fluorescent Lamp

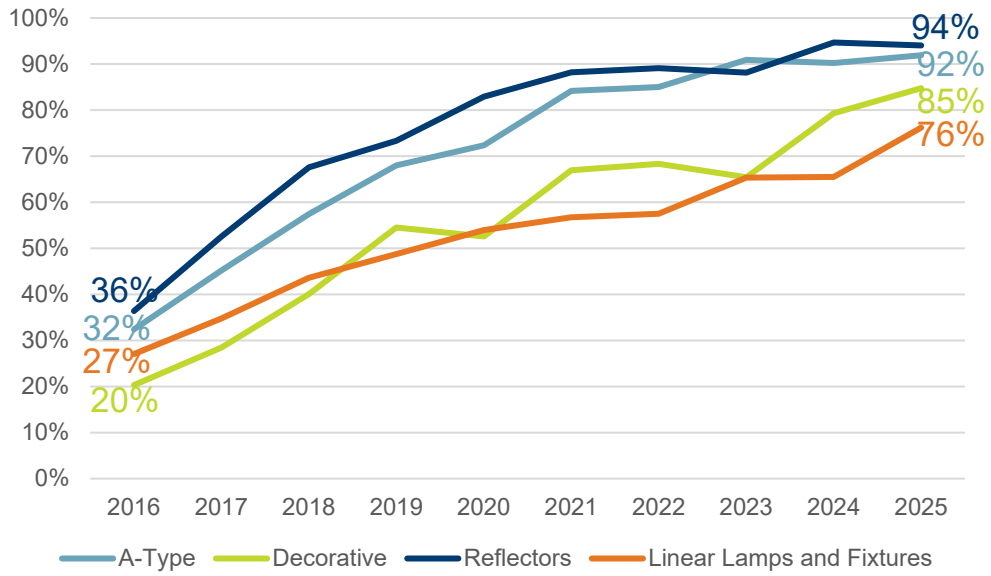
Linear fluorescent market share in Northwest fell to record lows while LEDs continue to grow



LED reached 80% of unit sales in 2025 — up from 70% in 2024, one of the largest single-year gains since 2016.

Linear fluorescent share fell to an all-time low of 14%, down 10 points after Oregon's ban took effect Jan. 1, 2025.

Sales data show high LED market penetration in all applications



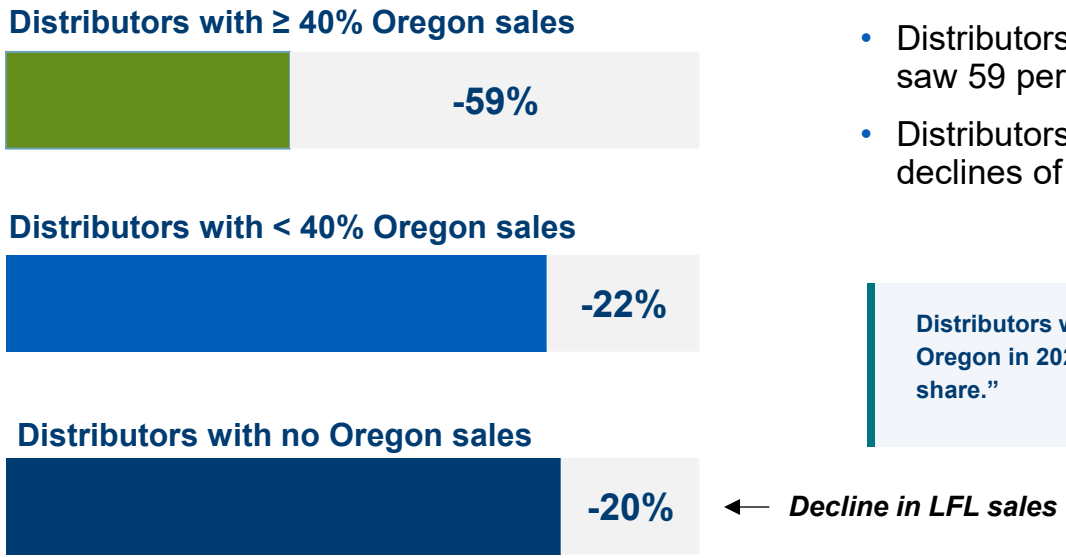
Reflectors and A-type applications have over 90% LED unit sales, holding relatively steady since 2024.

Decorative lamps saw a 6-point jump in LED sales and are at 85% of unit sales, as LED form factors continue to diversify.



Insights on Oregon Fluorescent Ban

Fluorescent decline was steepest among distributors selling in Oregon but still extended throughout the Northwest.



- Distributors with meaningful share of sales in Oregon saw 59 percent decrease in overall LFL sales.
- Distributors with few or no Oregon sales saw declines of ~20 percent.

Distributors with more than 40 percent of sales in Oregon in 2025 were considered to have a "meaningful share."

NOT EXTRAPOLATED

Distributors: Fluorescents are declining, with or without the bans

- Distributors predict LFL will naturally become obsolete within the next few years.
  - Many already proactively phasing out LFL nationwide due to low demand.
- Several voiced opinion that market drives technology, not regulation.
  - Conflicts with 2025 sales data and sharp LFL drop post-ban.
- But inefficient lighting isn't gone yet.
  - Urban vs. rural divide more influential than differences between states.

> *It will only go down from here.*

> *People are starting to realize they're living in the past.*

QUALITATIVE FINDINGS

Low awareness around Oregon's large-facility exemption

What it is: Exemption for purchasers with facilities aggregating to over one million square feet, passed in April 2026:

- Of three interviewees, only one was familiar with exemption and believed few distributors were aware.
  - Small and local distributors unlikely to go back to LFLs, while large national distributors and online retailers can more easily resume LFL sales in Oregon.
- Unclear how compliance is tracked.

> *Oregon doesn't stick to its guns.*

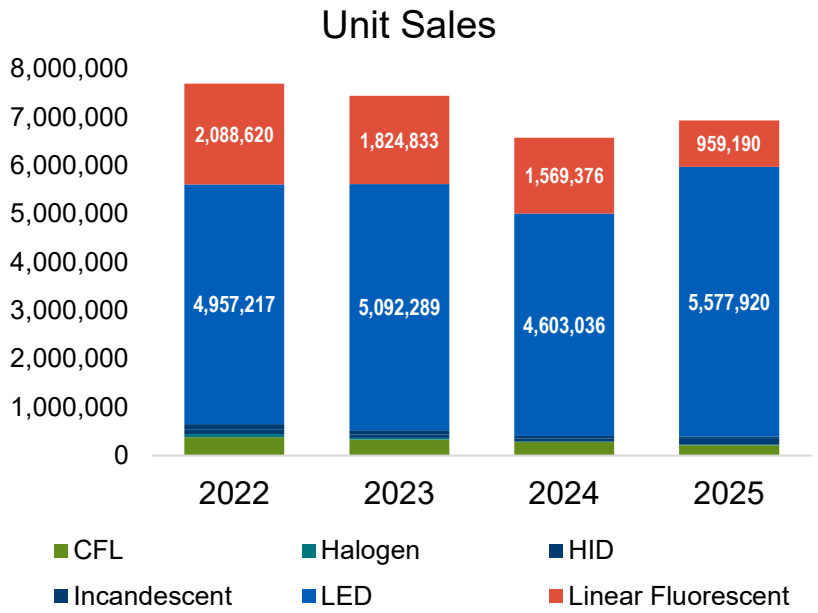
> *Why would I want to be stuck with LFLs?*

QUALITATIVE FINDINGS



Sales Volume Trends

Overall sales volumes rebounded; LED is growing beyond LFL replacement



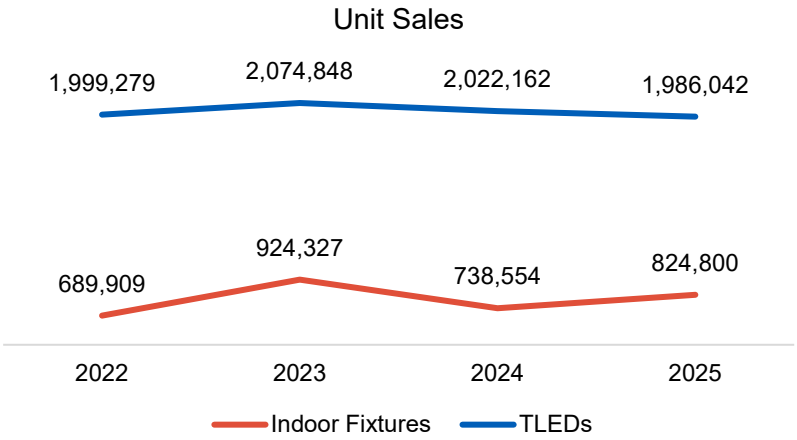
- Total unit sales increased by 12 percent after lowest reported sales volumes in 2024.
- LED isn't just replacing LFL one to one, LED market is still growing.
- While the long life of LEDs have somewhat depressed sales, economic factors likely drive year-to-year fluctuations.
- Distributors say there is still a slowdown in commercial construction in cities, even as overall sales increased.



Fixtures

Sales of Indoor LED Fixtures Grew in 2025

- Distributors report a slight increase in customers choosing full fixture retrofits over TLED swaps, although most say TLEDs are still the most common switch for customers switching from LFL.

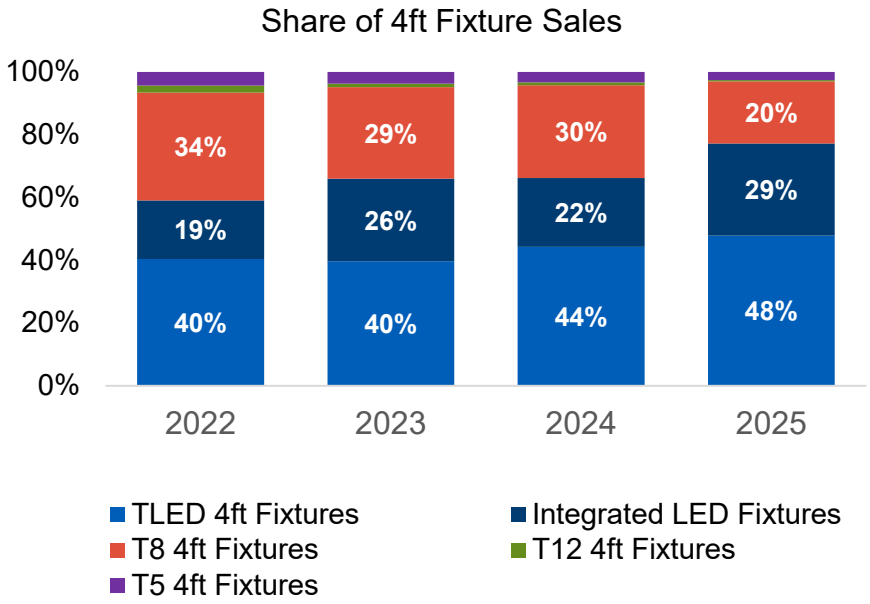


**Indoor Fixtures includes integrated 4ft fixtures, high/low-bay industrial fixtures, and LED other form factors.*

TLED unit sales held relatively steady in 2025 while indoor fixture unit sales grew (+13 percent).

TLED: Linear LED Tube

The Oregon ban and continued shift away from fluorescents are changing the 4ft fixture landscape.



- TLEDs up to 48 percent of 4ft fixture sales.
- Integrated fixtures have also increased in popularity

Lamp sales of linear fluorescents and TLEDs are normalized to two lamps per fixture for comparison purposes.

Distributors say customers fall into two camps for lighting decisions:

★ TOP-OF-THE-LINE FIXTURES

- New construction
- Offices
- Customer-facing businesses

$ SIMPLE & AFFORDABLE LAMP SWAP

- Municipal
- Schools
- Small business

This holds true for both:

TLED lamp swap vs. full fixture retrofit

Controls: standalone vs. networked (LLLC)

> *"The only people waiting are the ones who don't have the capital to do it today.*

QUALITATIVE FINDINGS



Controls

Controls

Definitions

LLLC Fixtures (Luminaire Level Lighting Controls)

Fixtures with embedded, networked controls built directly into the luminaire.

Networked sensors and gateways

External networked lighting control (NLC) components—such as remote sensors and gateways—that operate outside of LLLC fixtures to expand space-wide sensing and control.

Standalone embedded controls (non-networked)

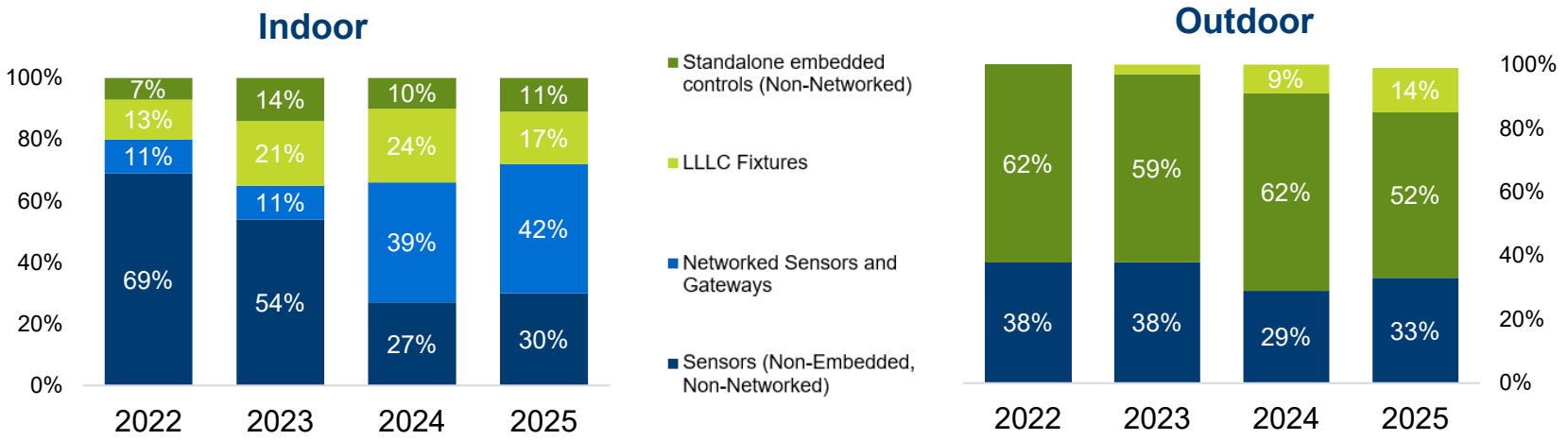
Autonomous, fixture-integrated controls executing local occupancy or daylight response without active network connectivity.

Sensors (non-embedded, non-networked)

Remote, non-networked devices (occupancy sensors, photocells, wallbox switches) providing isolated, local lighting control.

Controls

- **Indoor controls** have shifted toward networked options.
- Standalone controls and sensors continue to dominate **outdoor applications.**
- **LLLC** has grown in outdoor applications and has varied year to year in 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.

NOT EXTRAPOLATED

Rebates Still Have a Role to Play

Distributor feedback:

Rebates drive adoption

- Rebates often push customers toward fixtures and LLLC rather than simpler, less efficient options.
- In the Northwest specifically, both distributors and manufacturers say fixtures with controls are often the more affordable choice once rebates are applied.

Losing them can slow progress

- Some OR-based distributors report that the loss of LED utility rebates following the OR ban reduced LED sales, even as the ban itself pushes customers away from fluorescents.
- While the ban removes fluorescents from the distributor market, without rebate support, some customers may be choosing lower-cost, lower-quality LED options or purchasing LFL through other channels.

QUALITATIVE FINDINGS



Summary

Big Picture Take-Aways

The Oregon fluorescent ban is having a dramatic impact on the Northwest market. **Linear fluorescent** market share dropped 10 points in a single year, reaching an all time low of 14%.

14%

Of all unit sales – a significant decline

LED sales as a share of total unit sales continue to climb, now making up four of every five units sold.

80%

Of all unit sales were LED

TLEDs remain the most prevalent 4ft linear technology. As fluorescents decline, integrated LED linear fixtures are also rising in popularity.

48%

TLED share of all 4ft fixtures

Thank you to our partners at NEEA!

Thank You for Attending

See you on Feb. 3, 2027

Contact

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https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings