

January 13, 2016

BONNEVILLE
POWER ADMINISTRATION



RESIDENTIAL LIGHTING

SHAKE-UP:

ENERGY STAR 2.0

AND NEW MARKET ACTORS



Energy Saving &
Incandescent
Light Bulbs

Save
Live

There is some

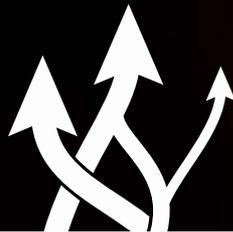
SCUTTLEBUTT

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.



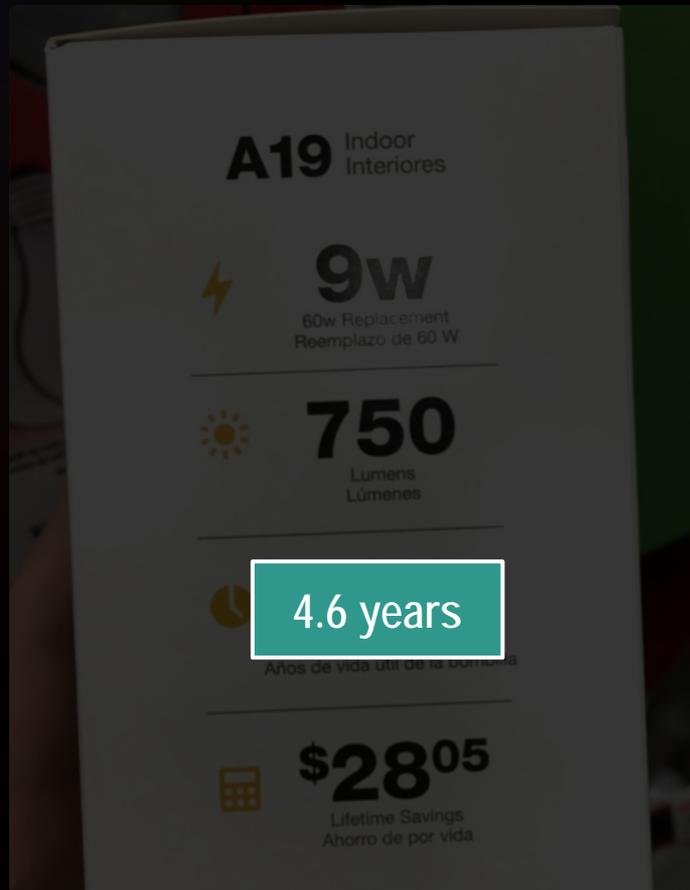
WHILE THE POLICY DEBATE
CONTINUES,

**RETAILERS
ARE ACTING.**

LESS OF THESE



MORE OF THESE.



An aerial, high-angle photograph of a large warehouse. The floor is a light-colored concrete, and the space is filled with tall, industrial shelving units (pallet racks) on both sides, stacked high with cardboard boxes. Several workers are visible throughout the scene, some wearing orange hard hats and others in blue shirts. They appear to be engaged in various tasks like moving boxes, inspecting inventory, or operating equipment. The lighting is somewhat dim, creating a sense of a busy, industrial environment.

THE
SUPPLY
CHAIN

IS CHANGING TOO.

Major Manufacturers



GE, Osram Sylvania, CREE, Philips

Contract
Manufacturers



MLS, San'an Opto

Small & Mid-sized
Manufacturers



MaxLite, TCP, Lighting Science Group

Traditional Retailers



Home Depot, Lowe's, Walmart,
ACE Hardware, Fred Meyer

Online Retailers



1000bulbs.com, LampsPlus.com,
LightingDirect.com

THE PLAYERS

THEN.



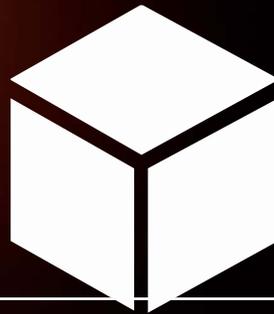
NOW.



IMPLICATIONS AND QUESTIONS



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



What products are coming? Which are going?

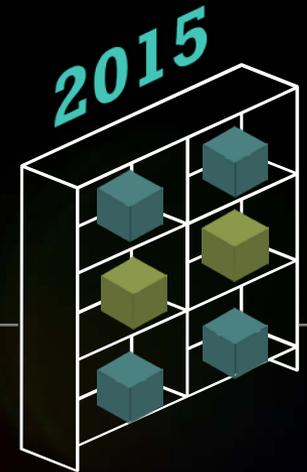
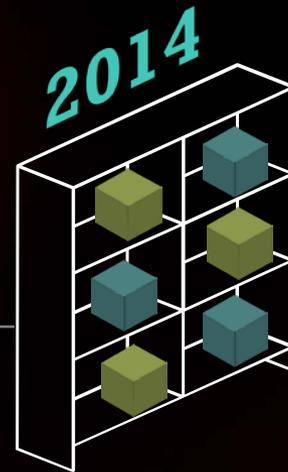
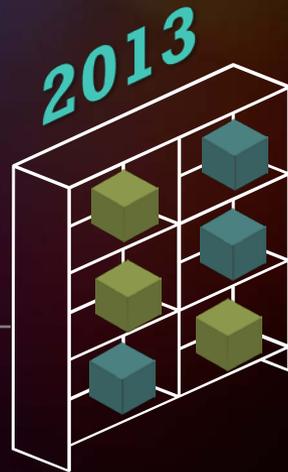
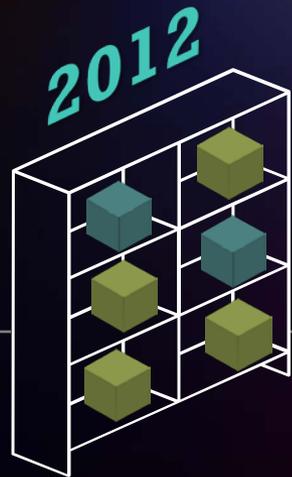


How will programs work with online and contract manufacturers?

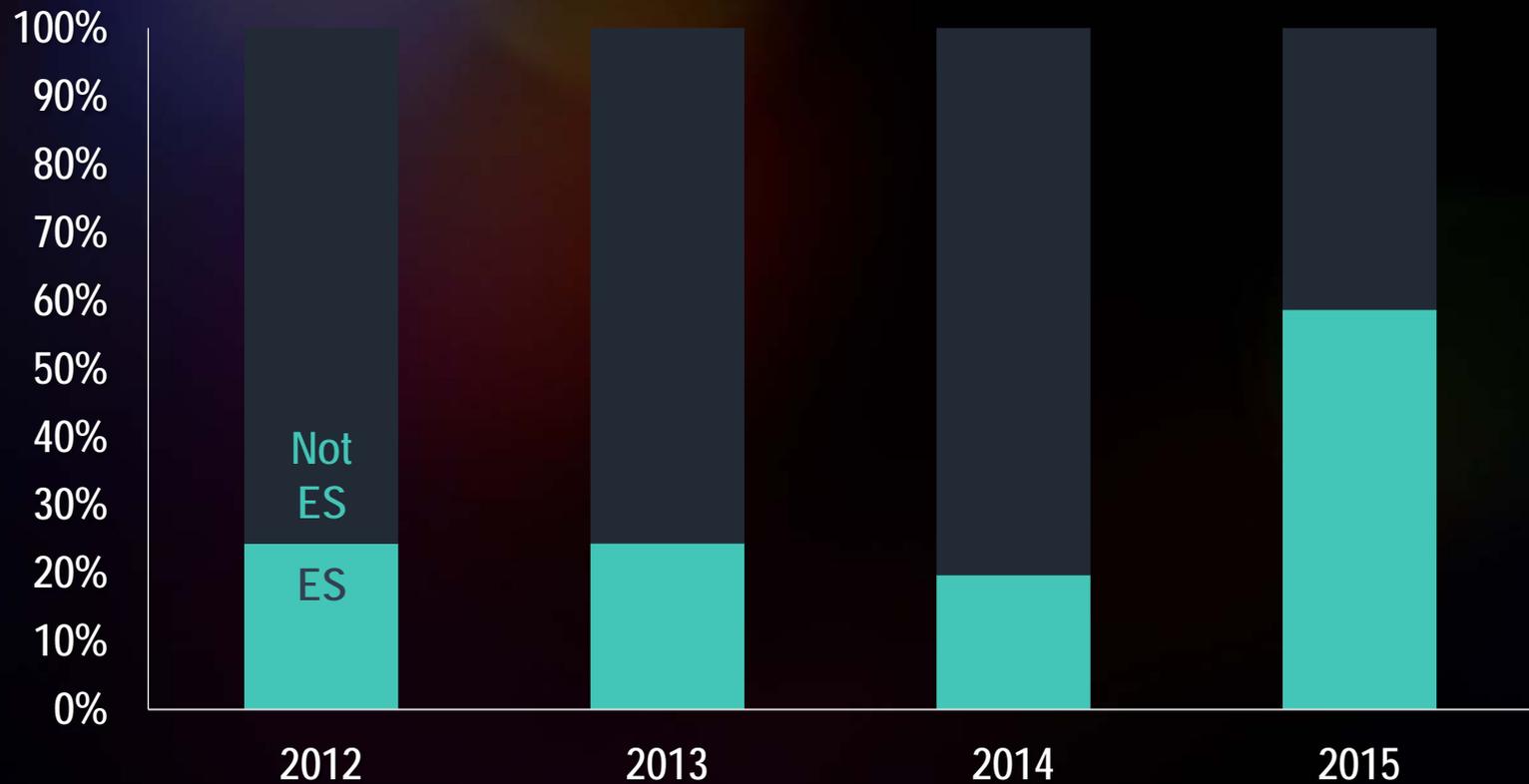


But what do the
DATA SAY?

NEEA's RETAIL SHELF SURVEYS

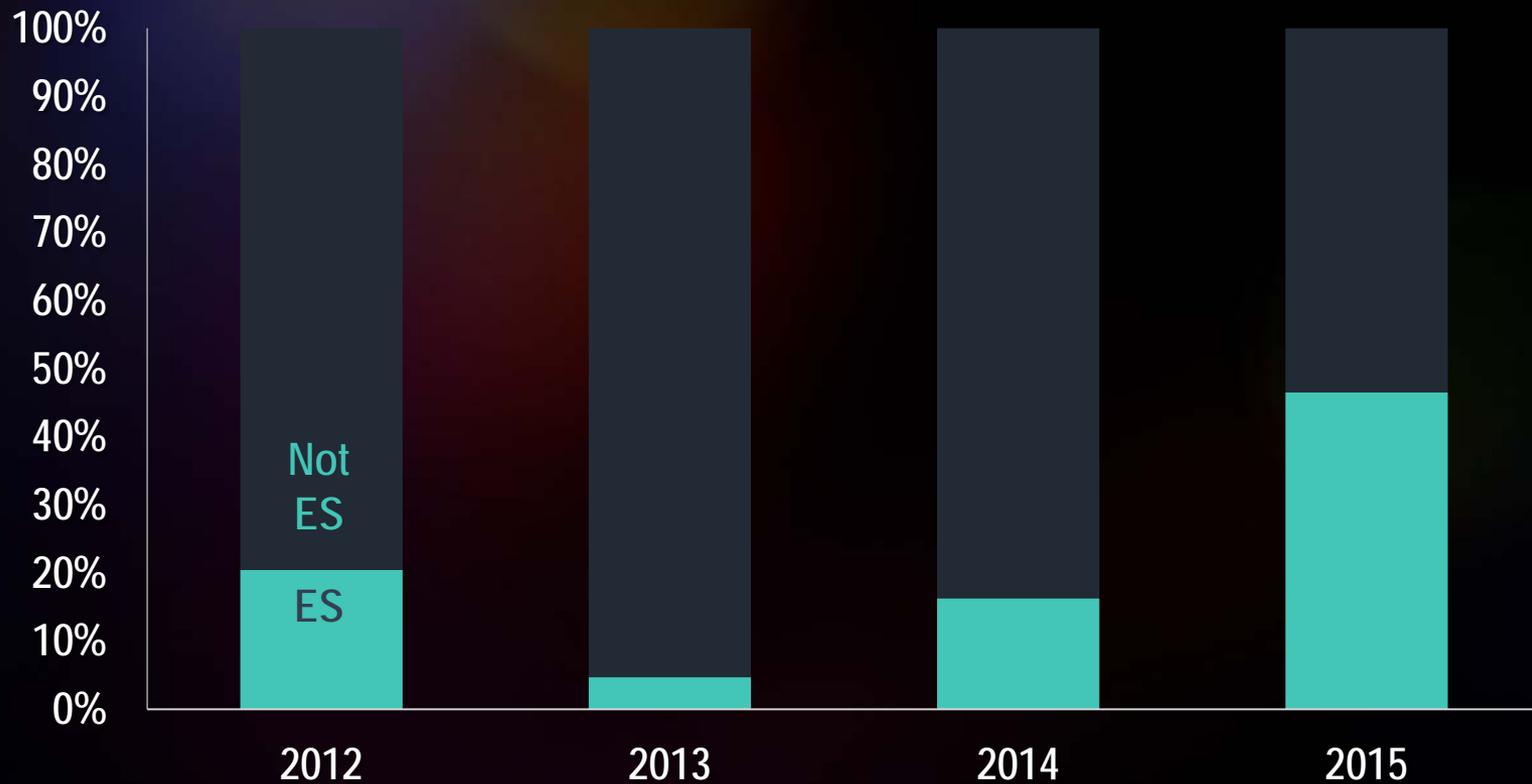


MORE GENERAL PURPOSE ENERGY STAR LEDs IN 2015

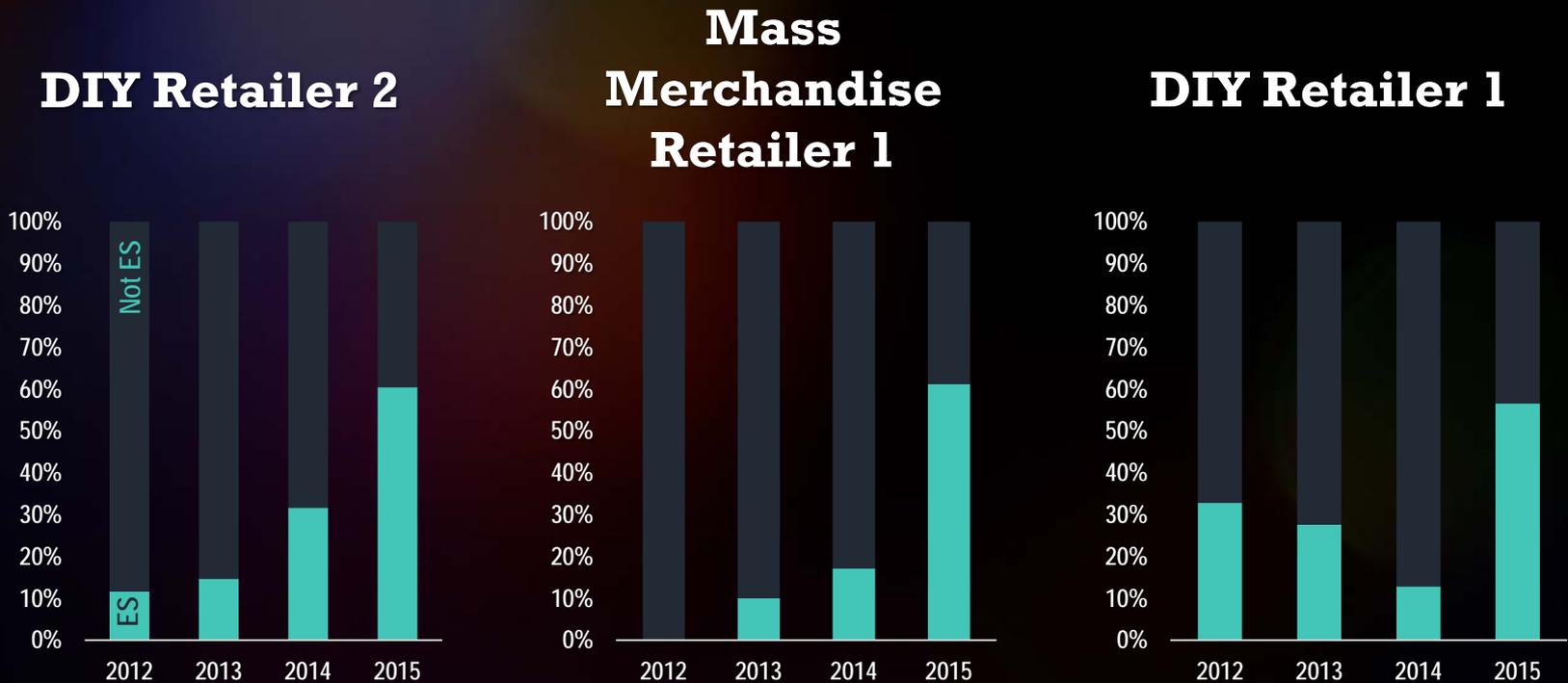


AND MORE SPECIALTY

ENERGY STAR LEDs IN 2015



TRUE AT ALL THREE RETAILERS



% General Purpose ENERGY STAR LEDs

A photograph of a warehouse aisle filled with boxes of Sylvania Double Life flood lights and Halo contractor packs. The text 'THINGS TO CONSIDER' is overlaid in the center. The background is dark and slightly blurred, showing the perspective of the aisle with high ceilings and industrial lighting.

THINGS TO CONSIDER



Summer
Shelf Study

August
2015

ENERGY STAR
Partner Meeting

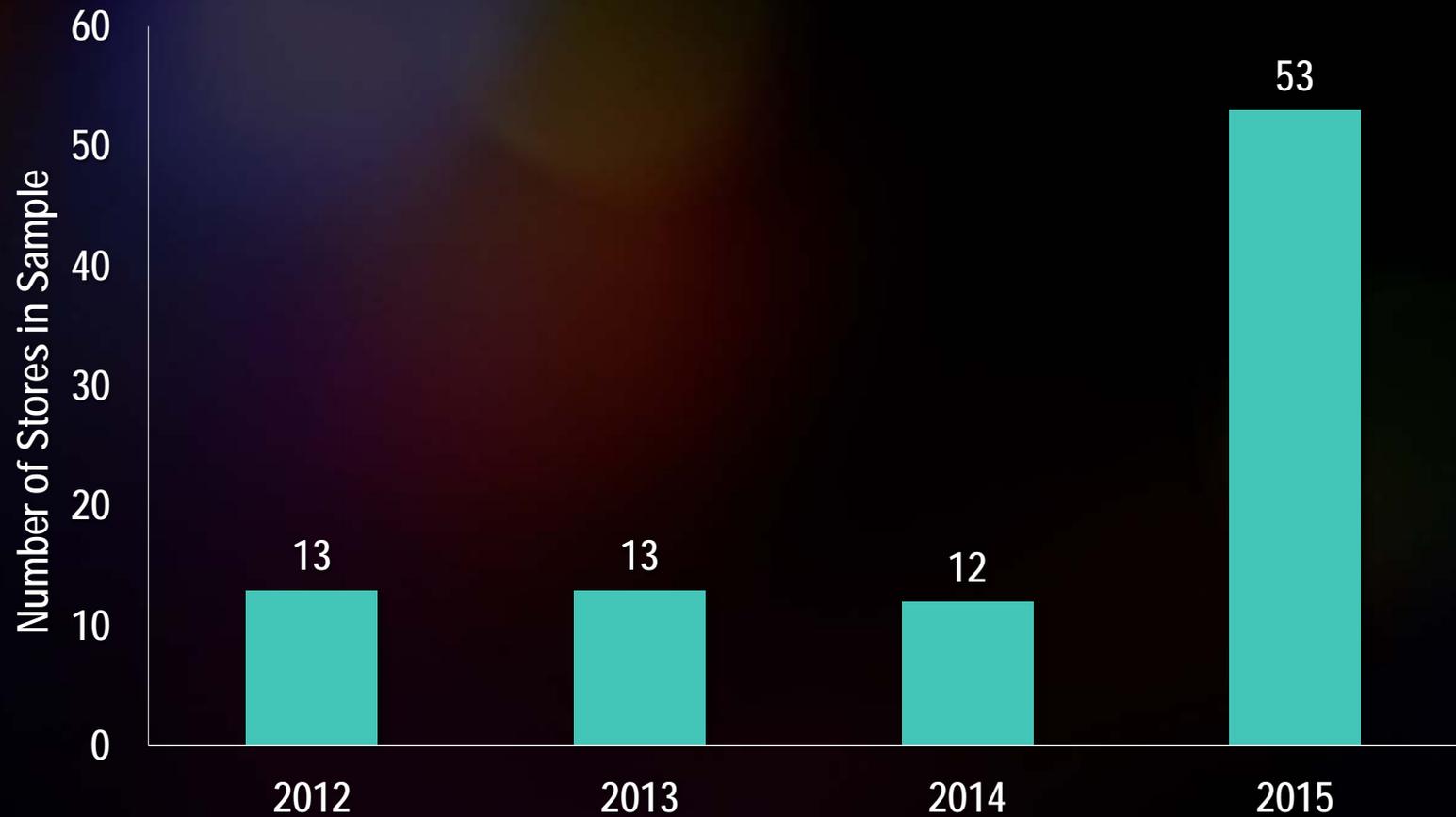
October
2015

Products on
Shelves

2016 and
Beyond

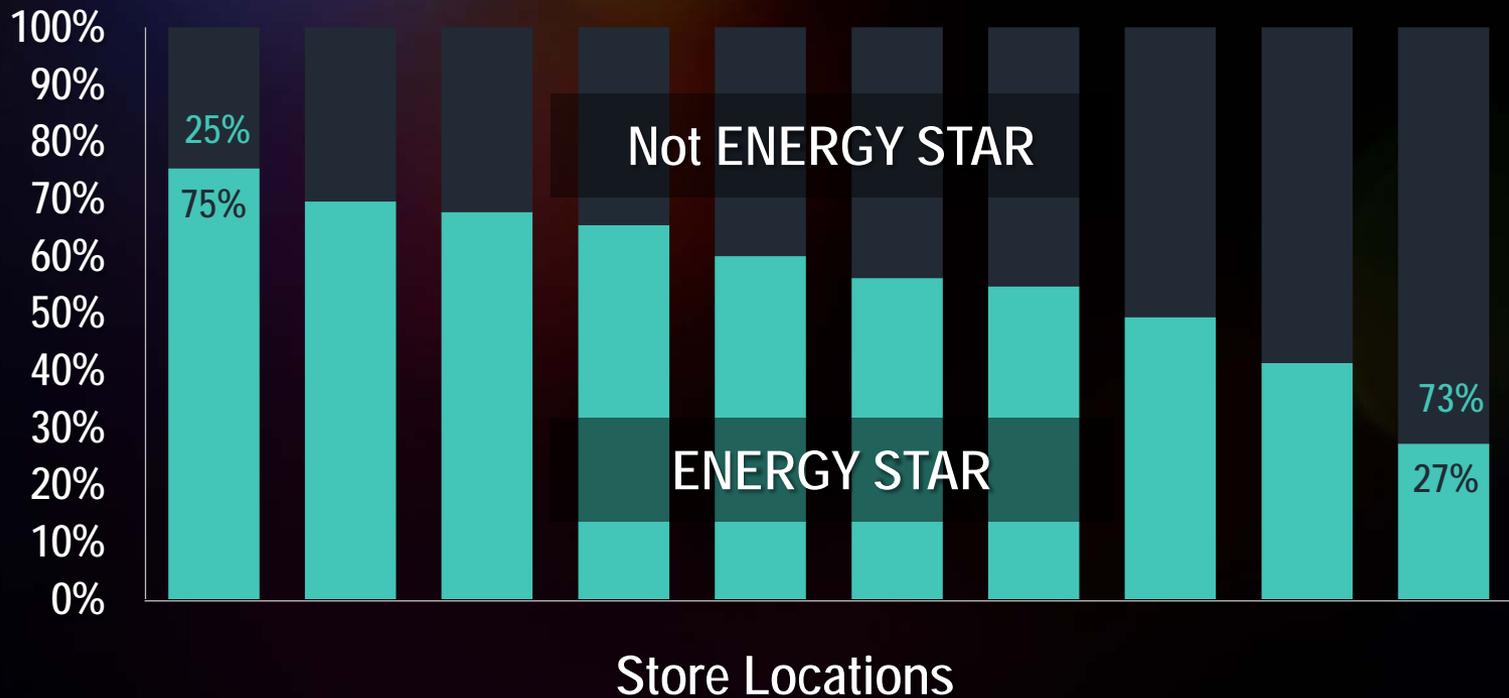
**DISPARATE
TIMING**

SAMPLE SIZE



RETAILER VARIABILITY

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





UPCOMING

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



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