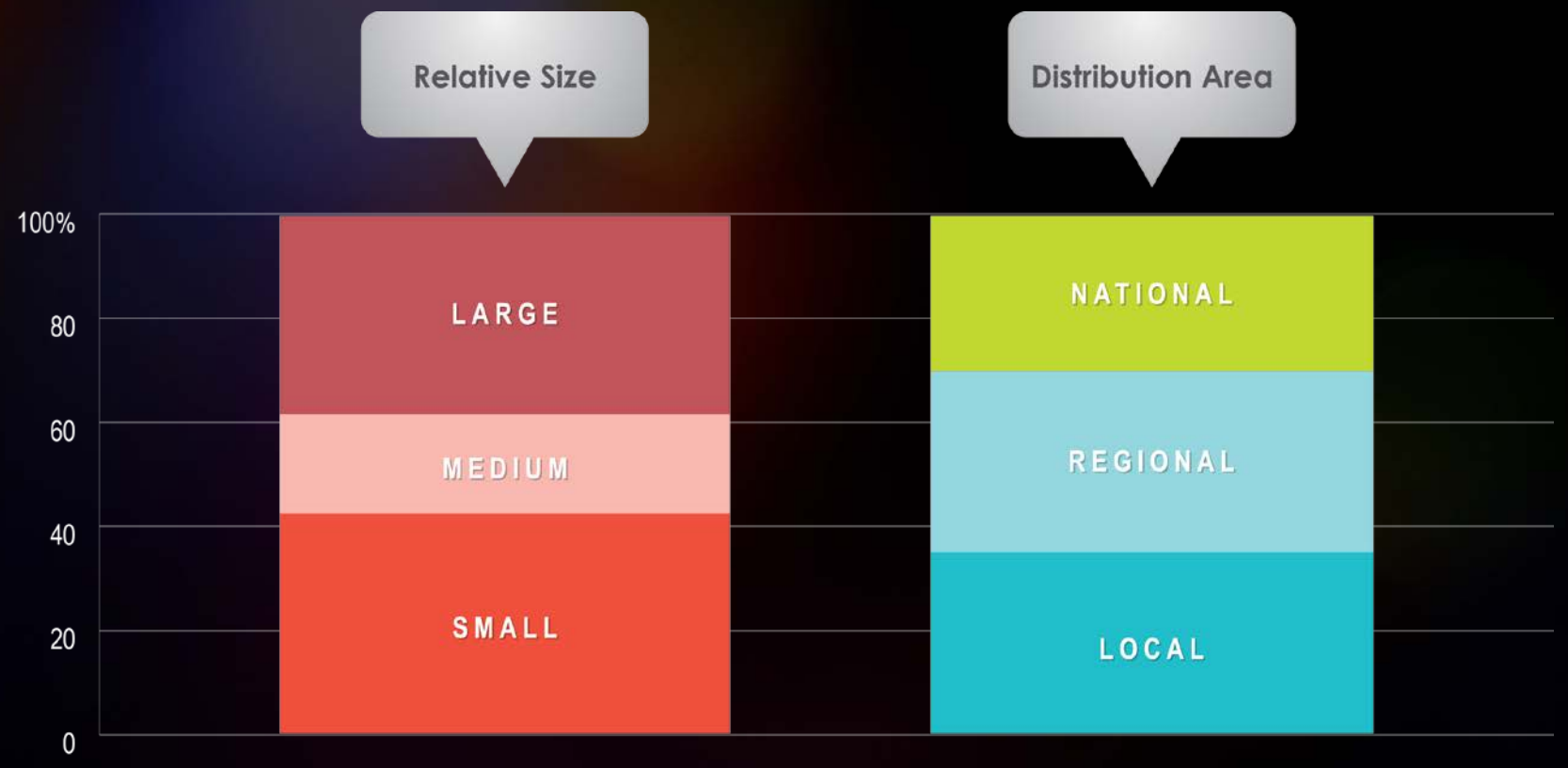
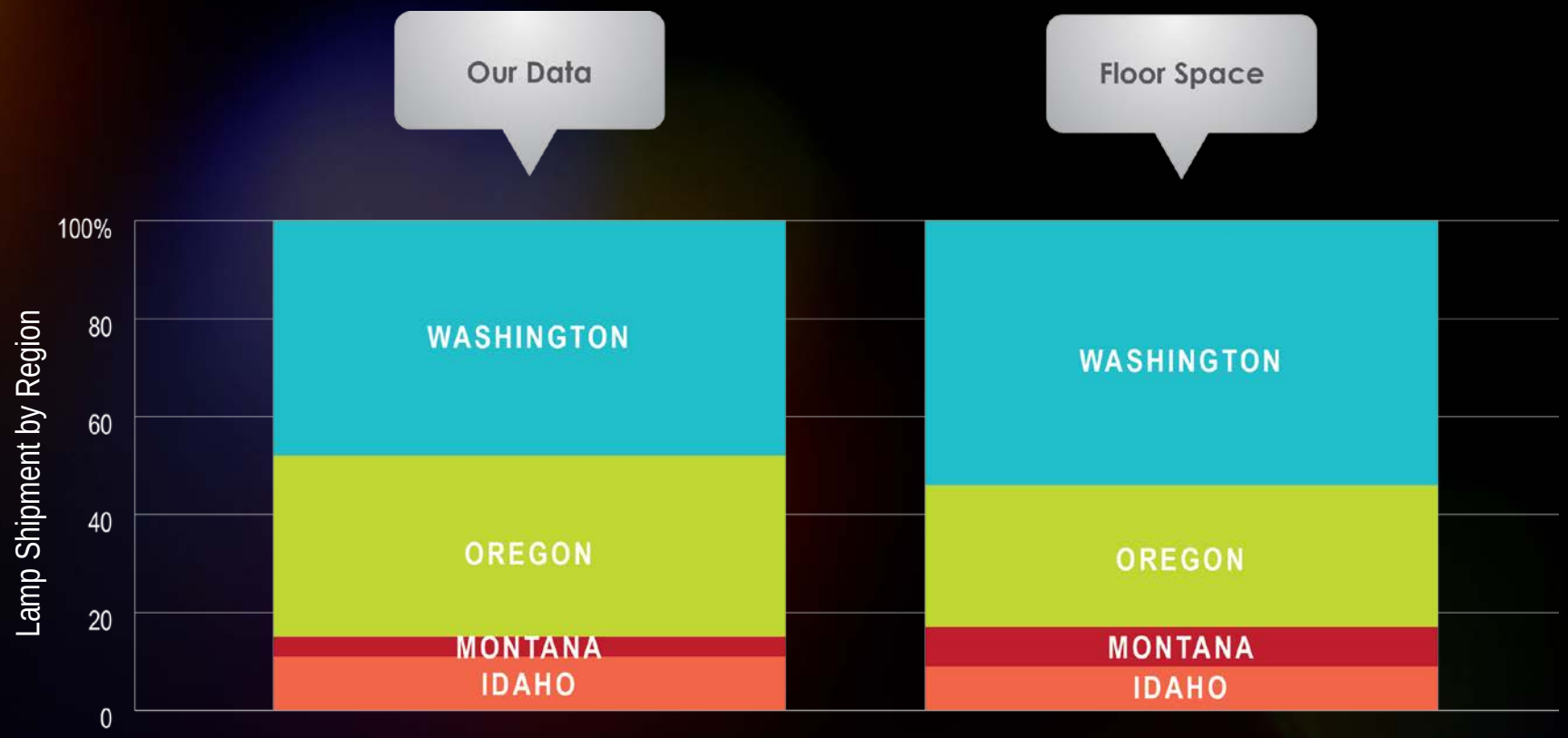
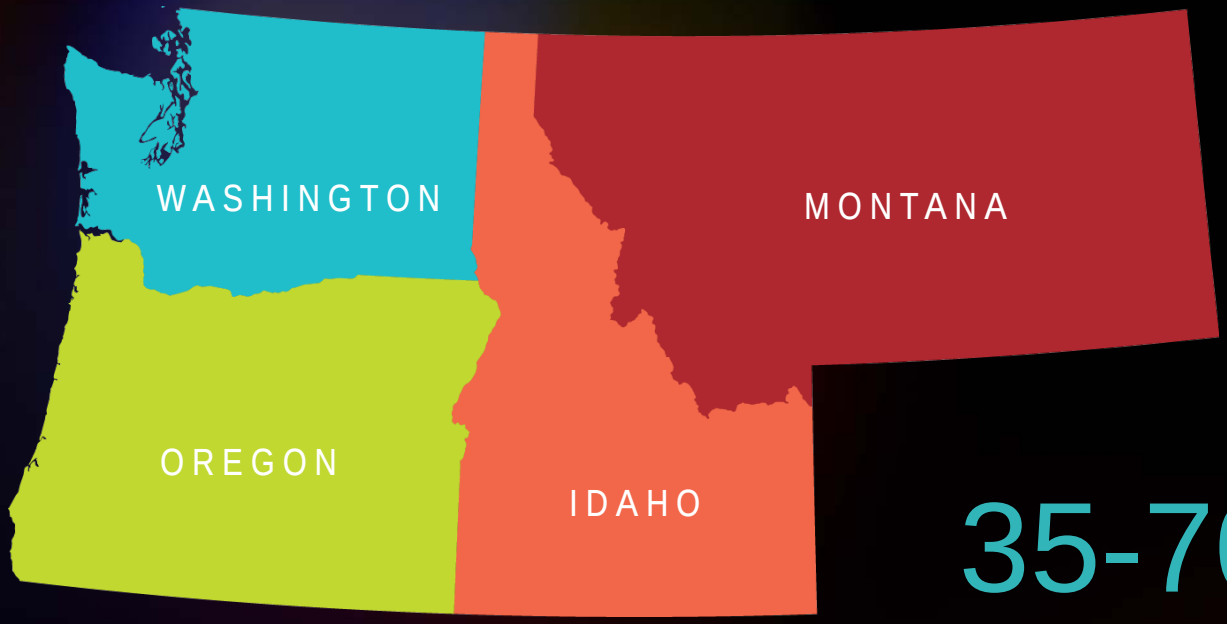
Northwest Non-Residential Lighting Sales 2015

Data Collected from 34 Distributors



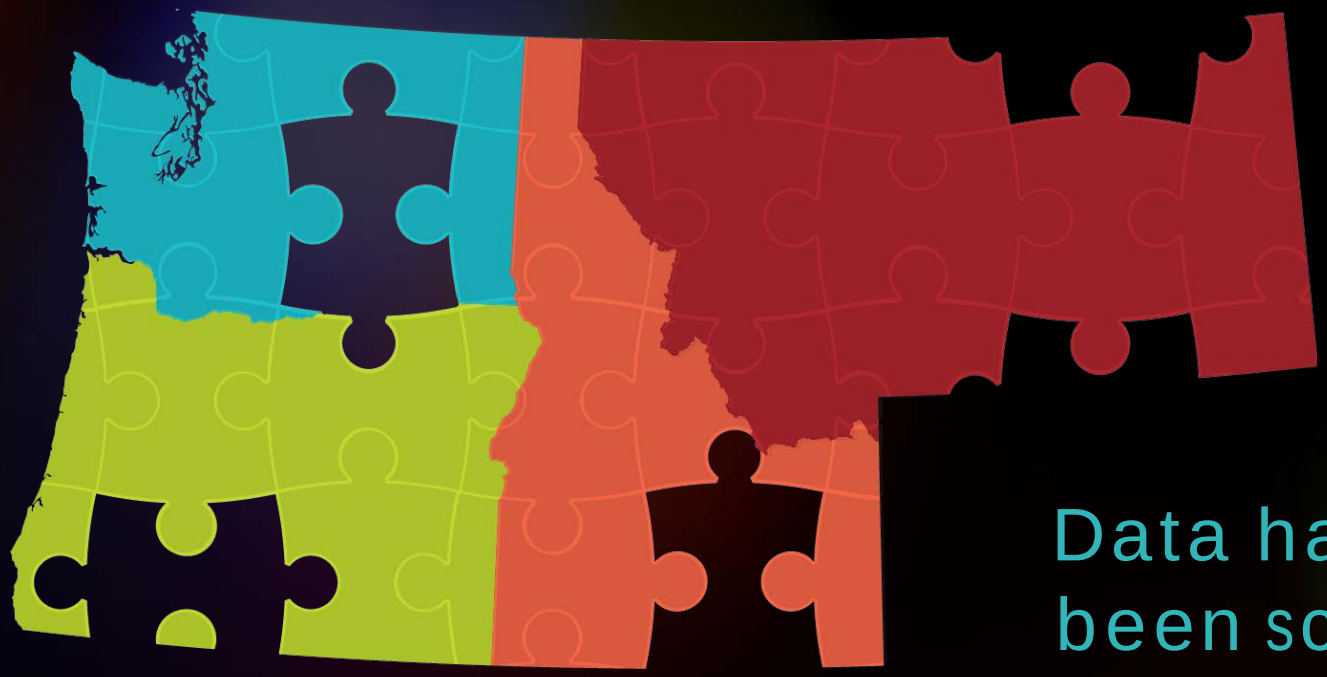


Balanced regional representation



35-70%

of the total market represented



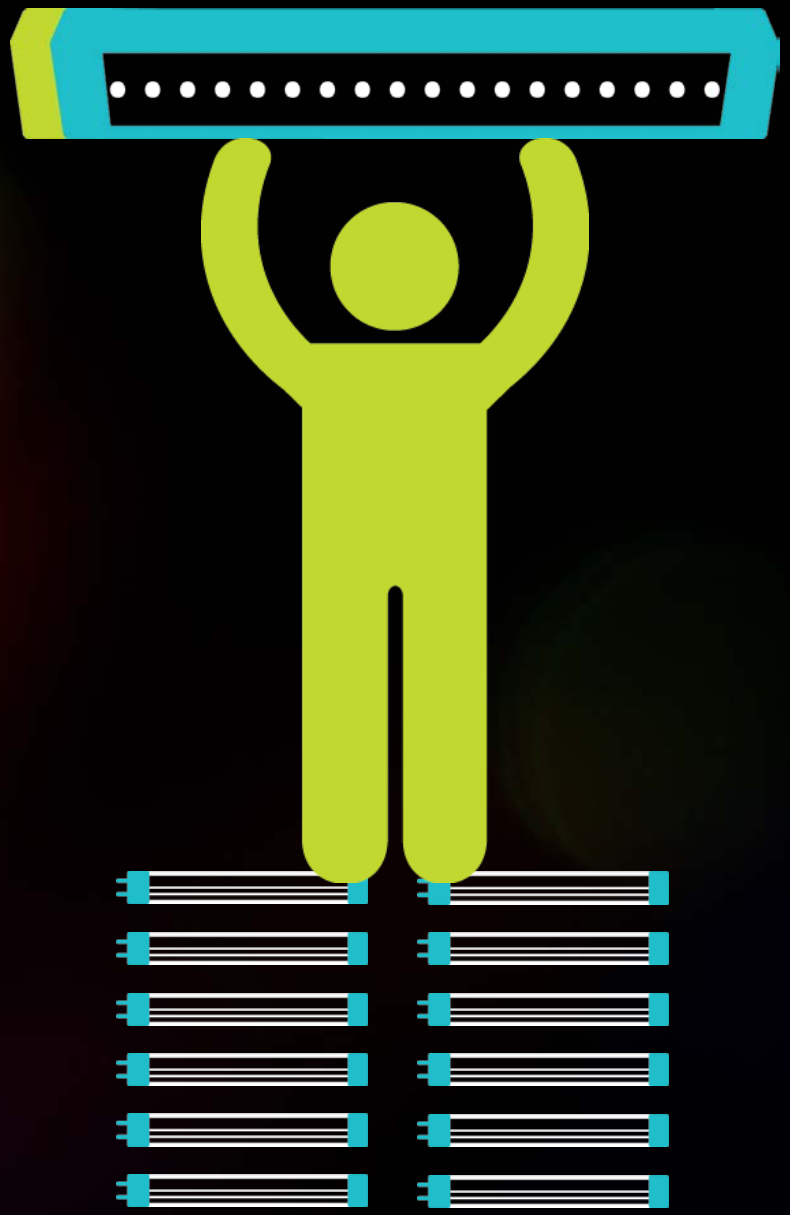
Data has not been scaled up to represent the total market

SALES DATA FINDINGS

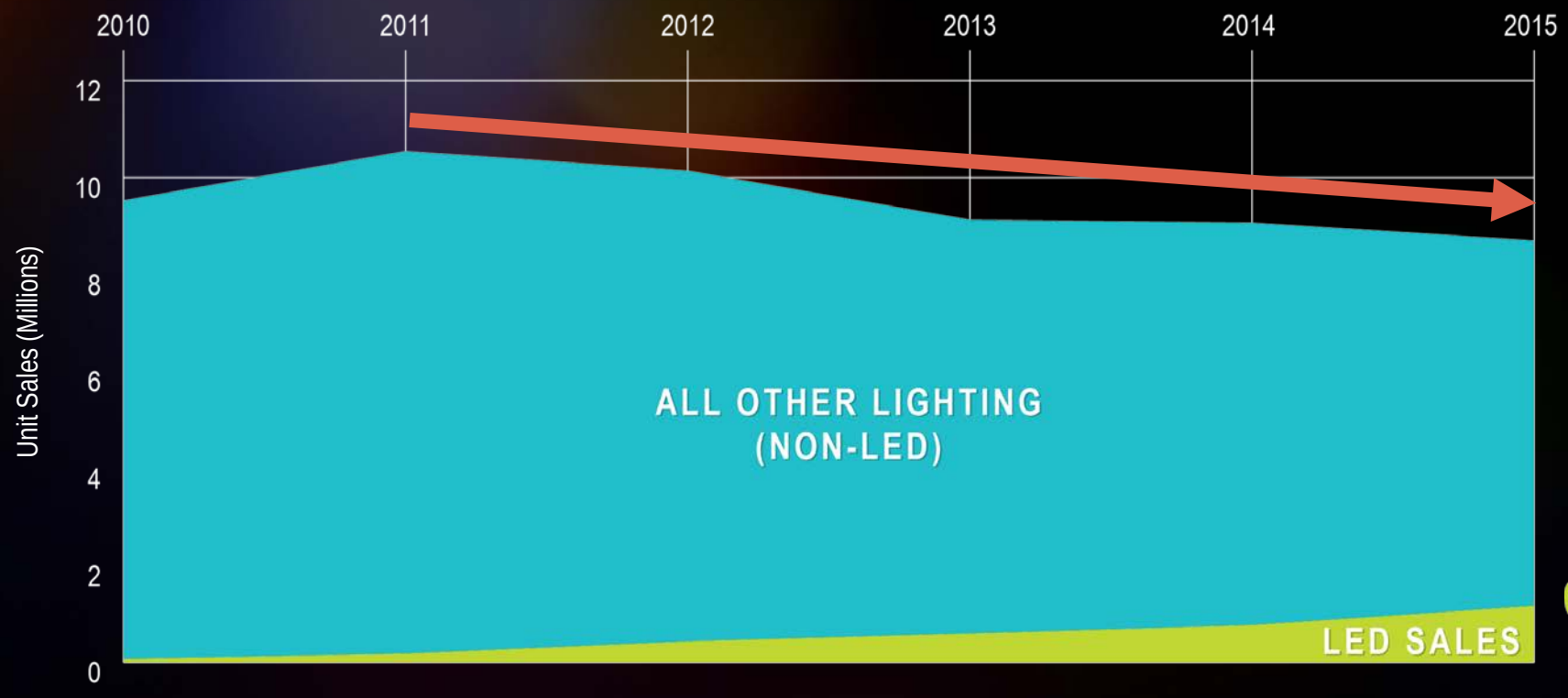
A MARKET IN FLUX

LED sales,
while still a small
part of the market,
are booming

Long-life LEDs mean
fewer replacements

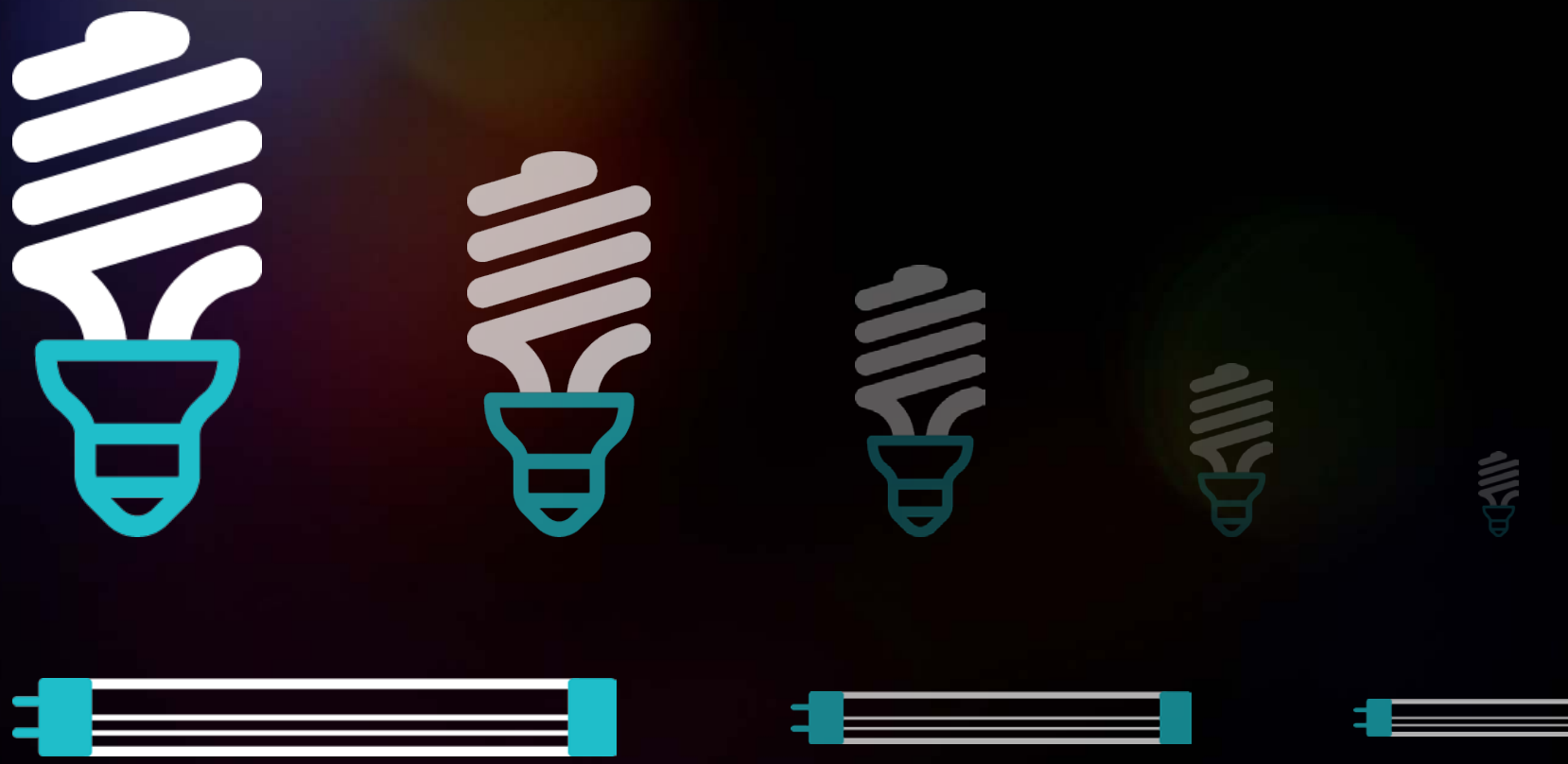


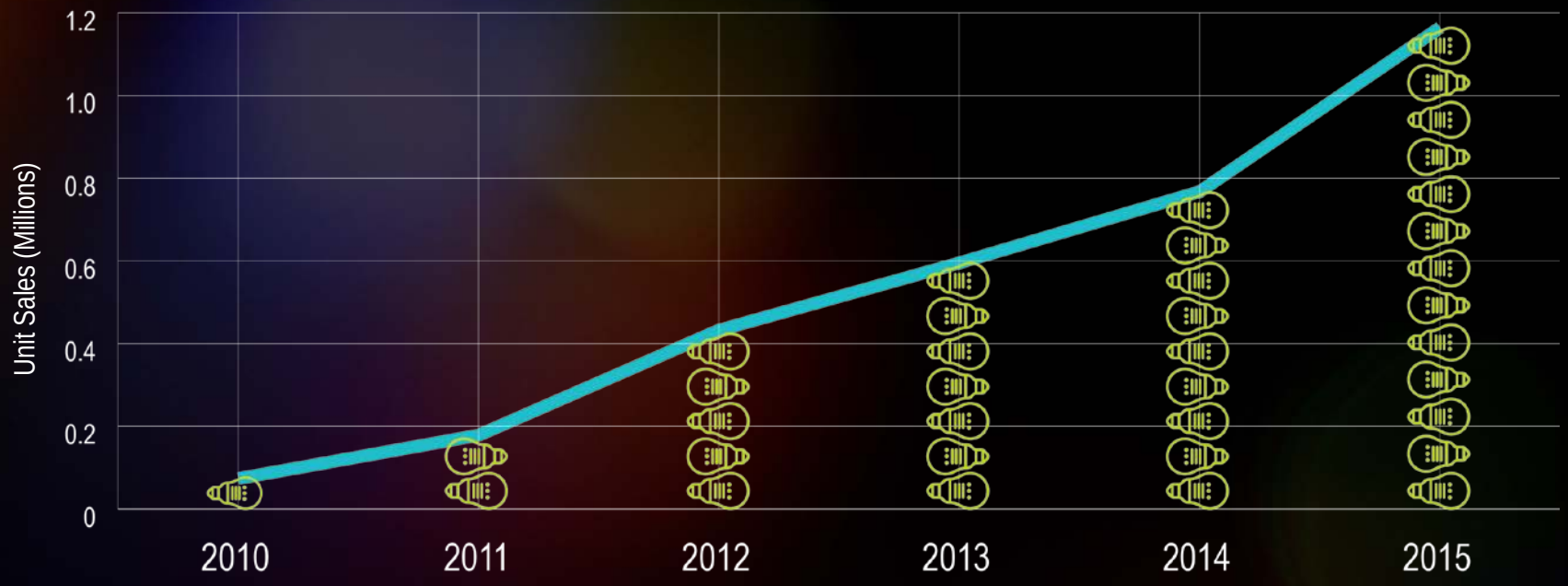
Total Unit Sales
are shrinking



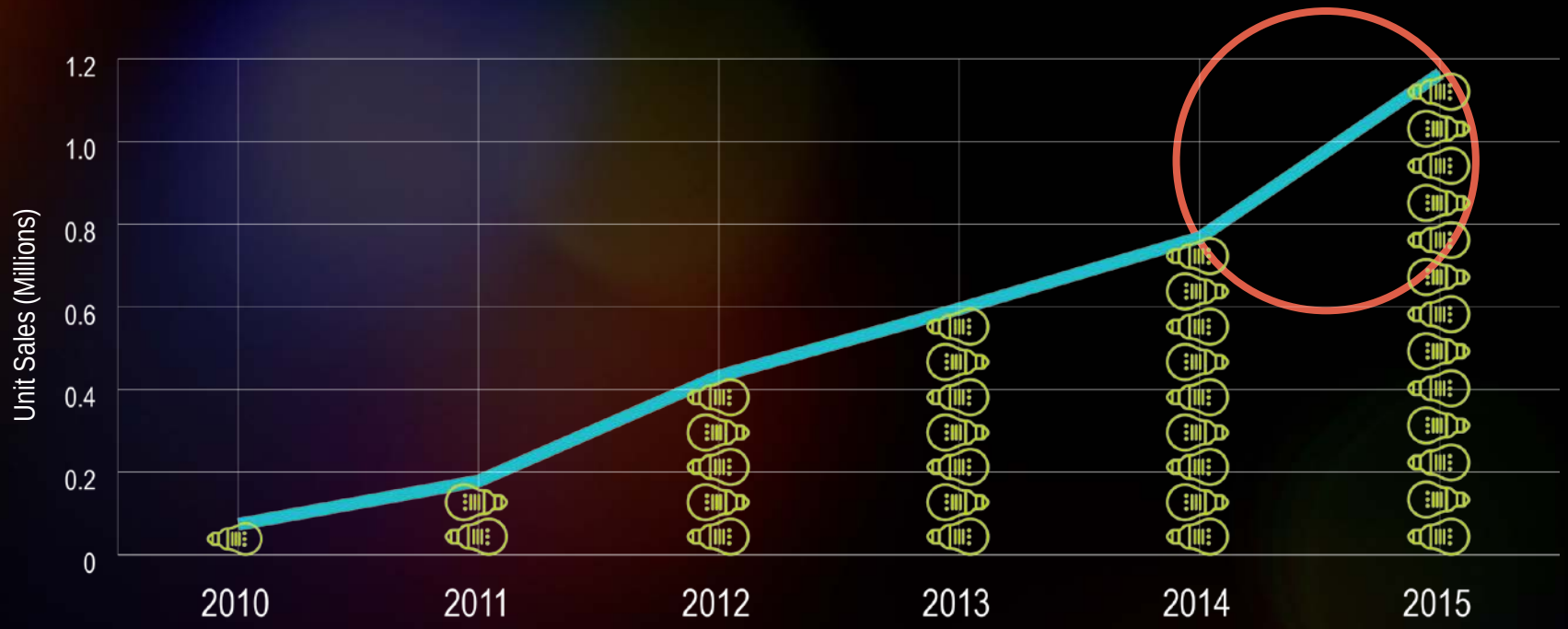
as LED sales grow

Manufacturers are Phasing Out Legacy Products





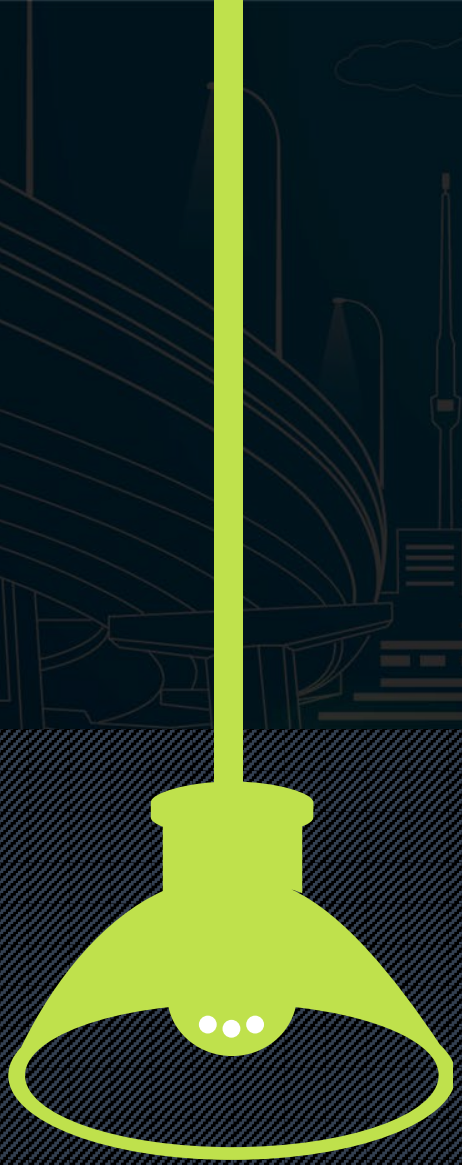
But LED Unit Sales are Growing



But LED Unit Sales are Growing

LED GROWTH

Product Type Differences

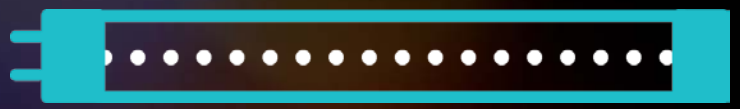


2015 TLED Unit Sales saw 2.7x Growth

2014: 84.7K

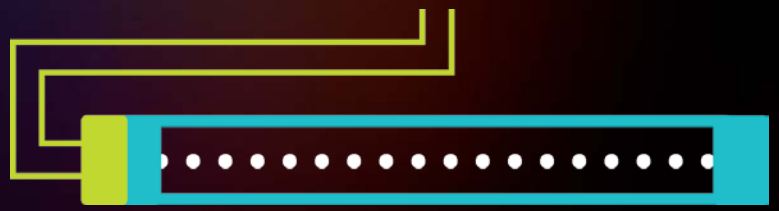
2015: 229.9K

Product Offerings are Expanding in TLEDs



Good: TLEDs

★



Better: Retrofit Kit

★★

Best: LED Luminaire + Controls

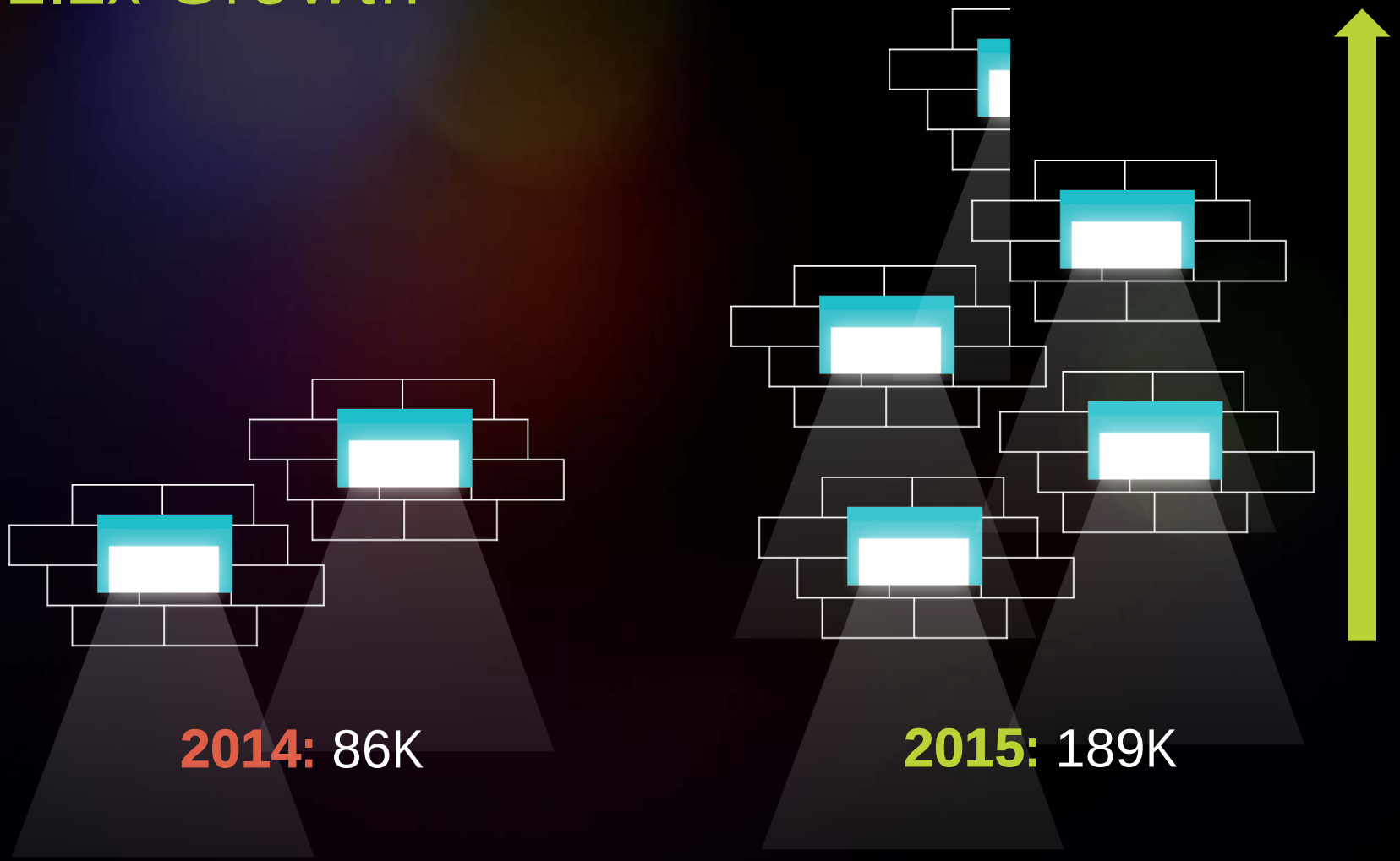
★★★

Downlights saw
2x Growth

2014: 97K

2015: 199K

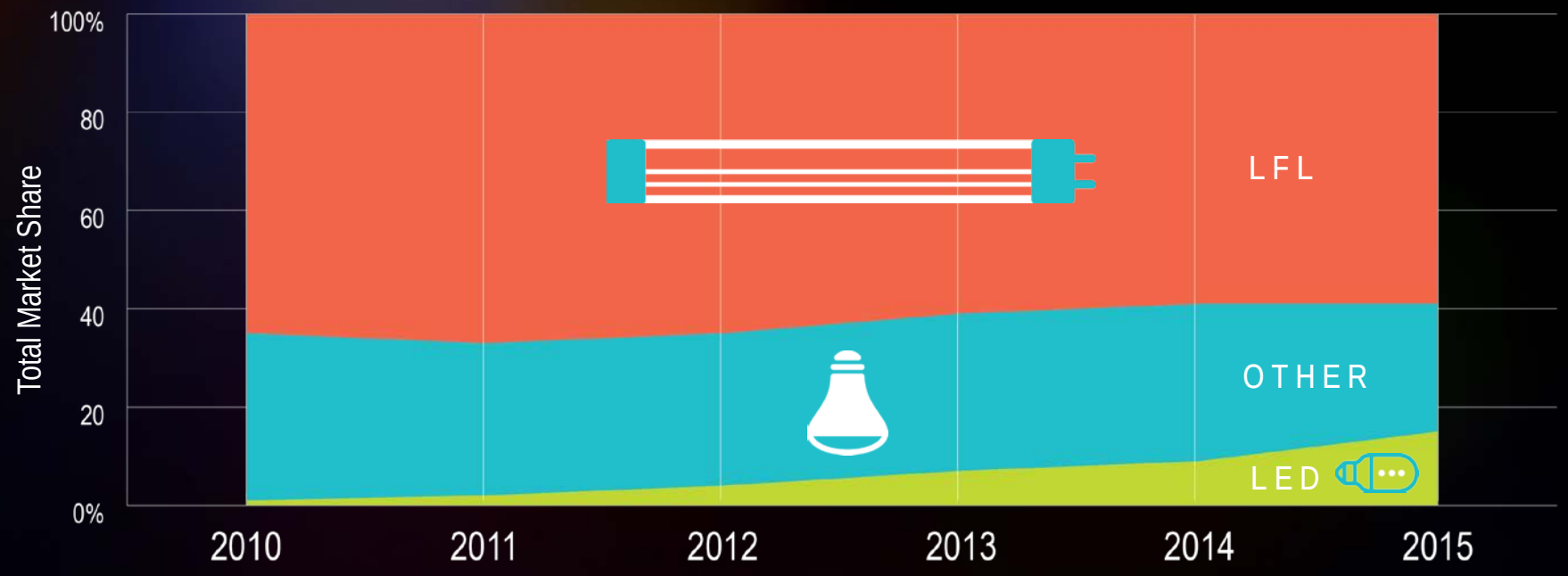
Fixtures saw
2.2x Growth

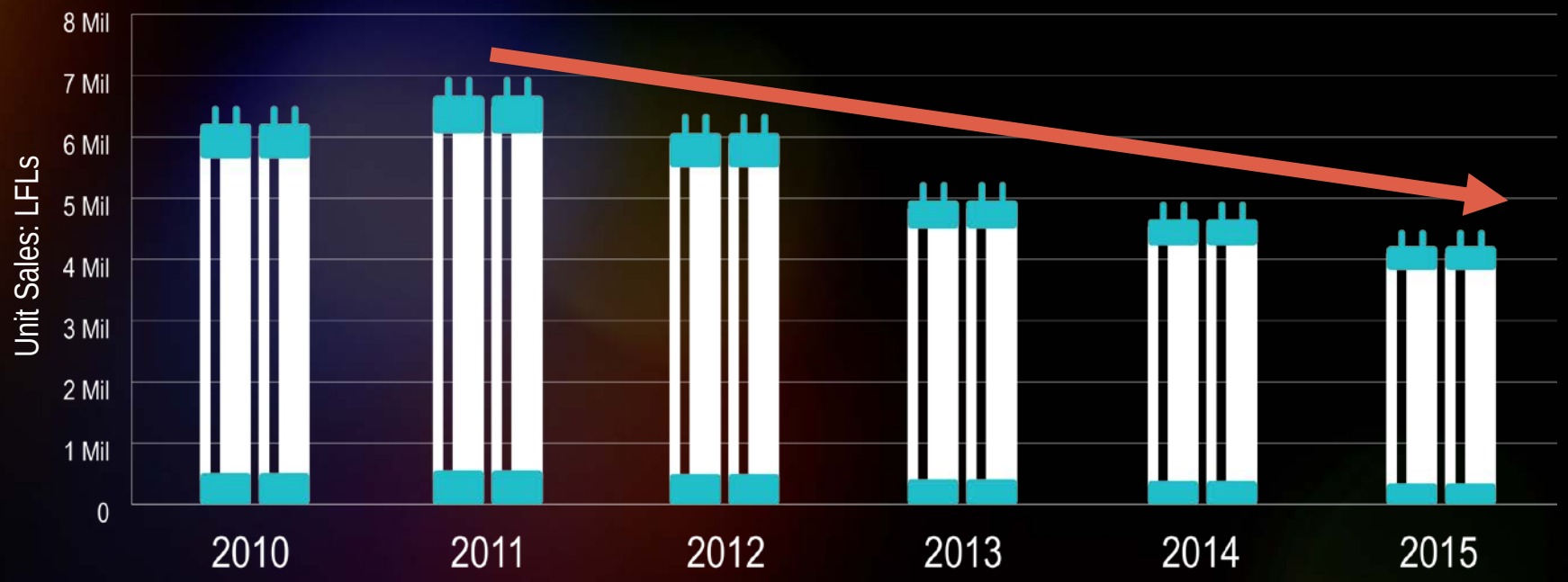


LINEAR FLUORESCENT LAMPS

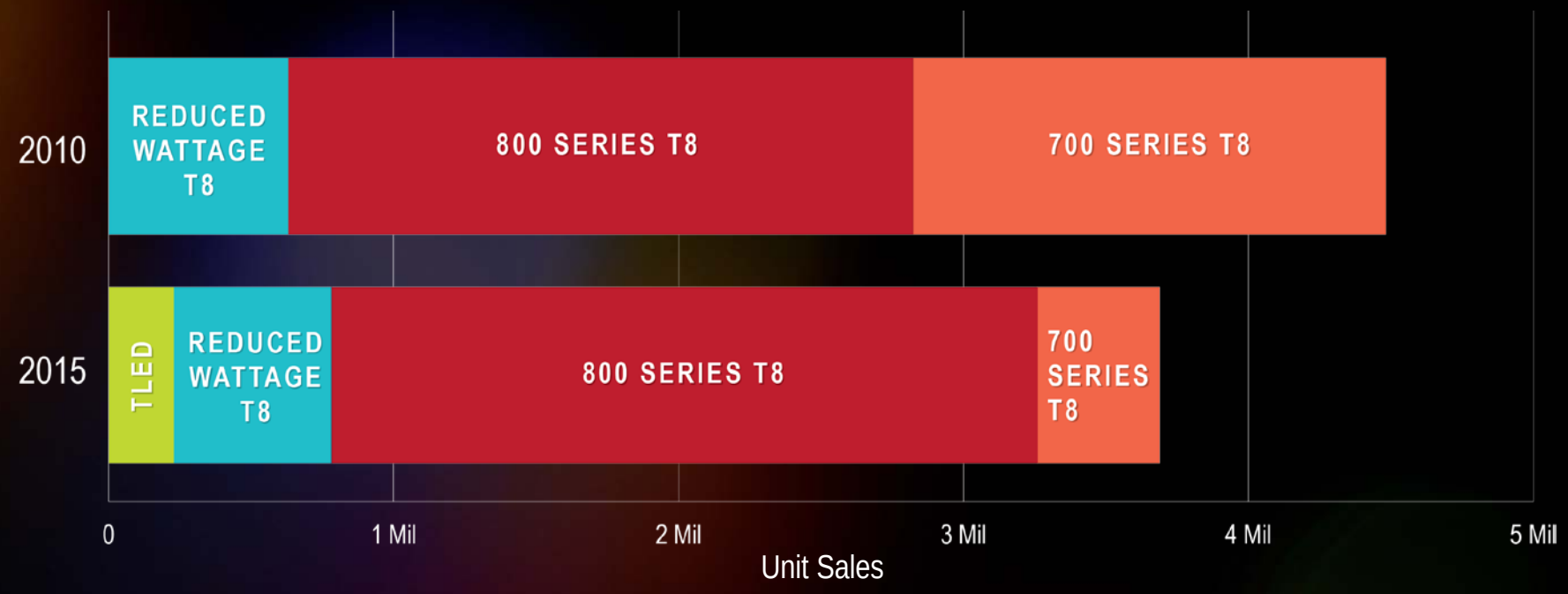
Still Dominant

LFLs Remain Dominant in Market Share





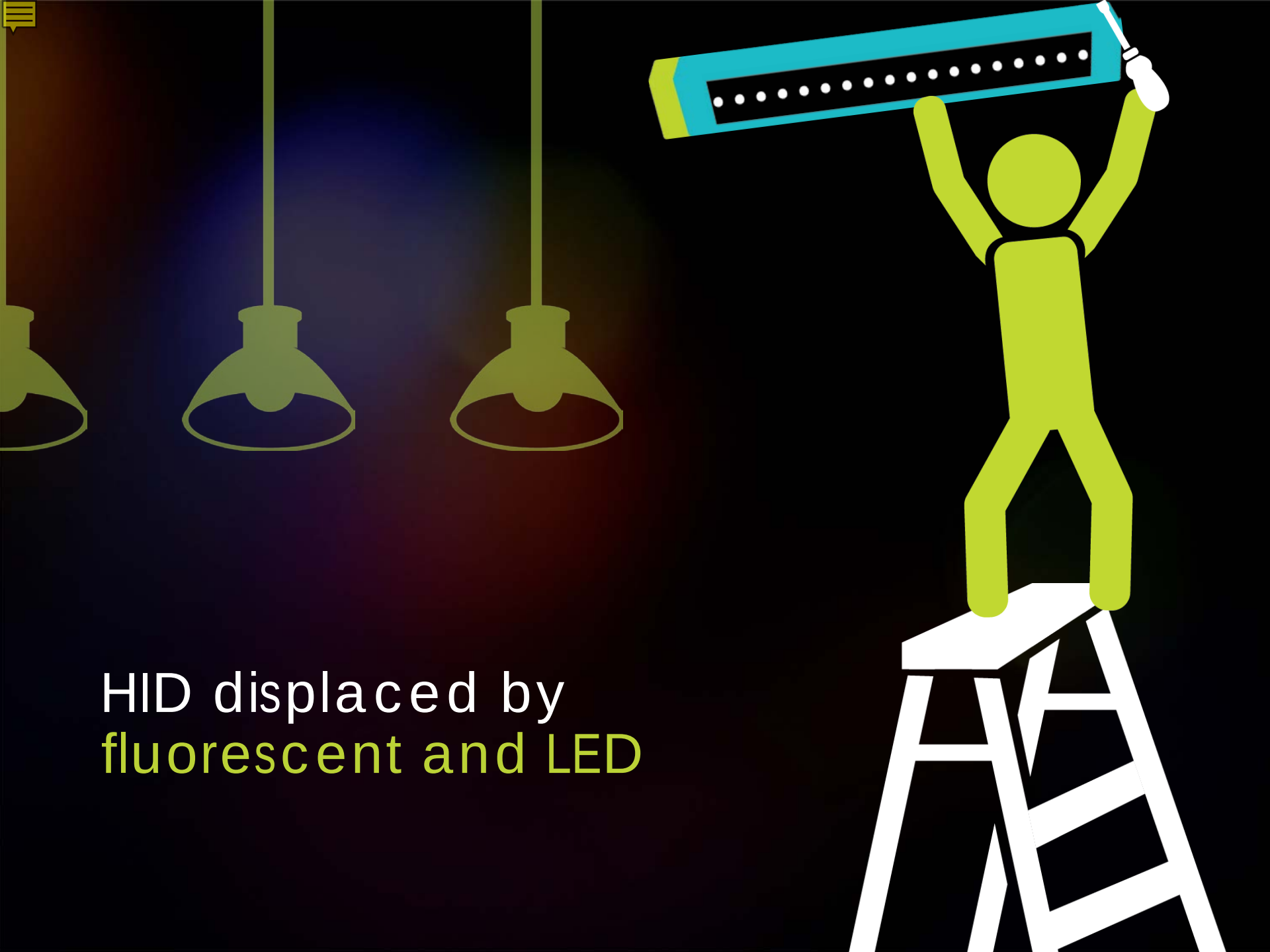
...but show steady decline in unit sales



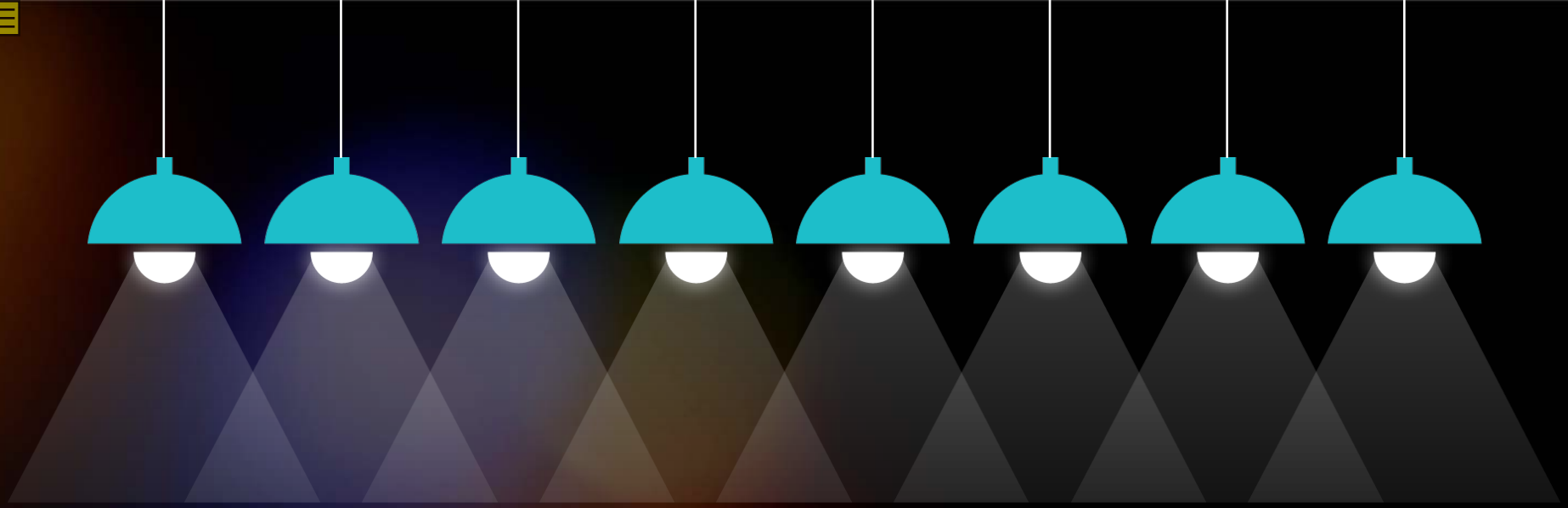
LFLs are shifting toward more efficient options even as sales decline

HID LAMPS

Continue to Decline


HID displaced by
fluorescent and LED

LEDs available for Hazardous Environments

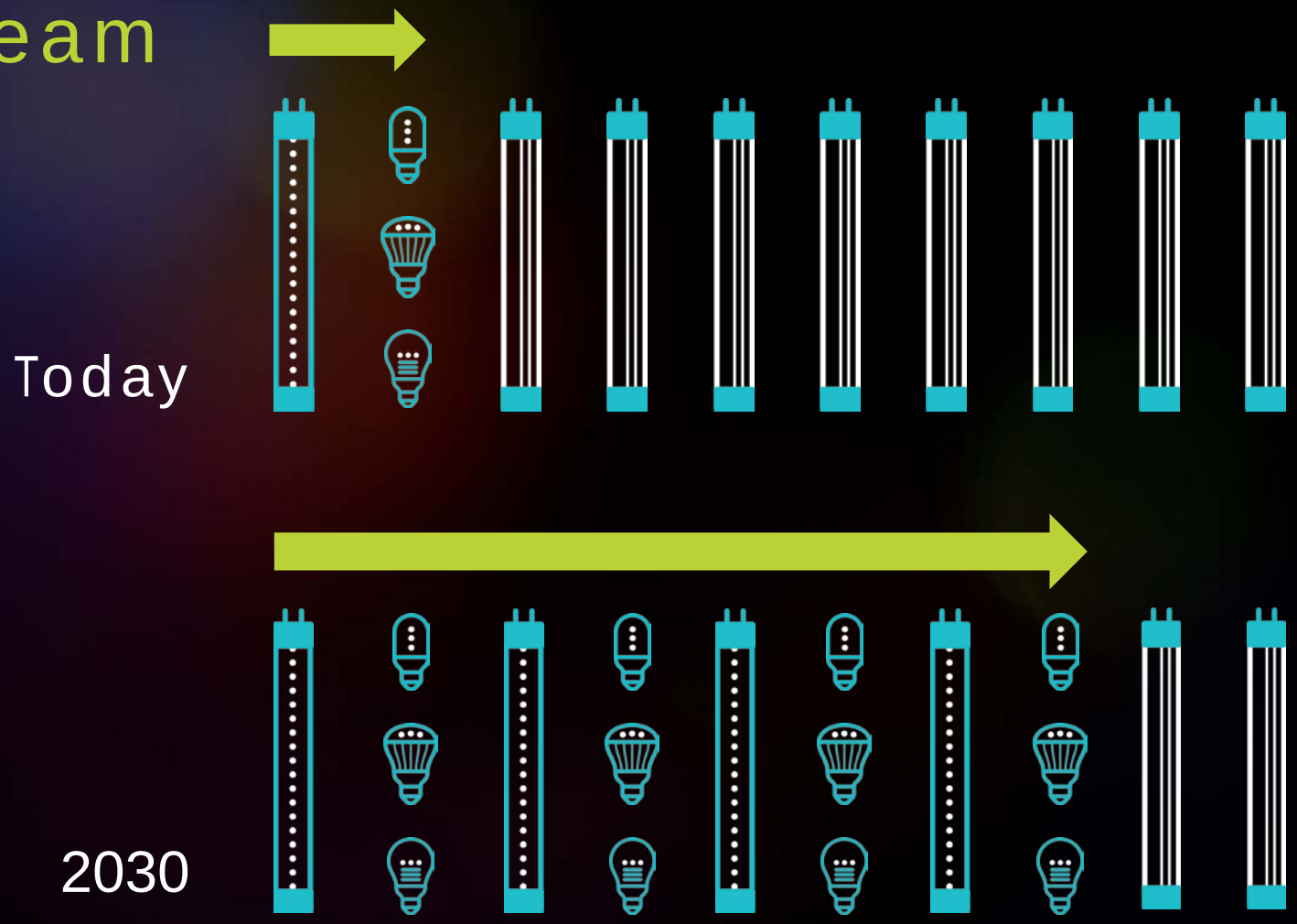


2011: 800K Units

2015: 300K Units

In 2015 HID Unit Sales
dropped 37%

DYNAMIC FUTURE

More Changes to Come

LED in the mainstream