

LED Market Adoption: Status and Trends



Innovative Research



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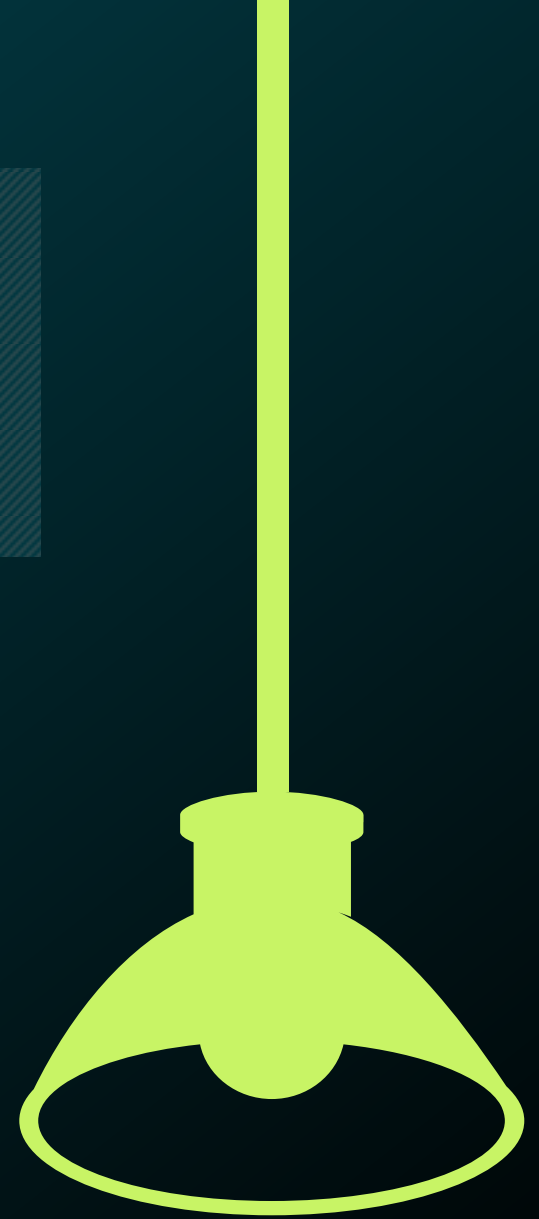
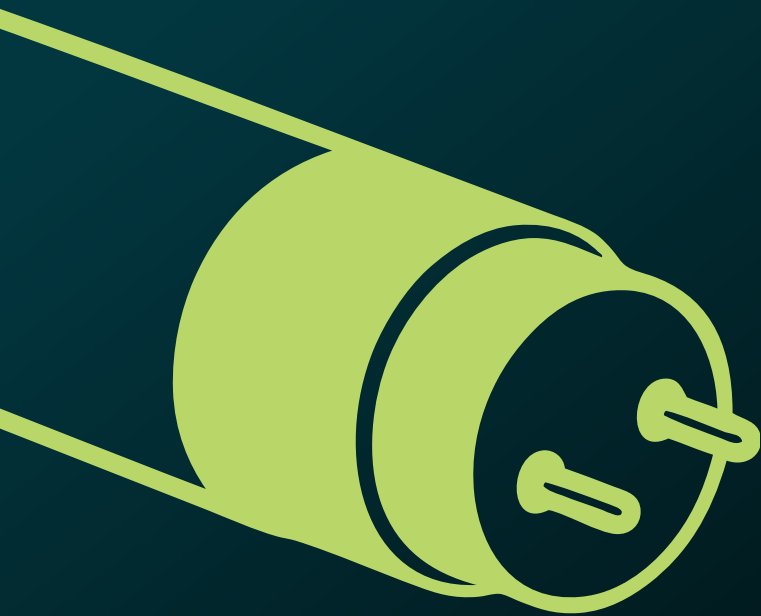
Market Characterization

Residential
Round 1

Non-Residential
Round 3



Attempting to track the
entire lighting market

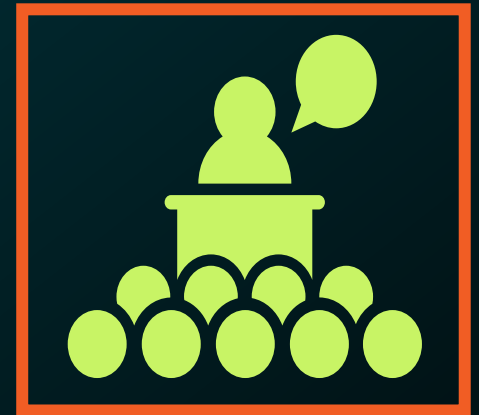




Sales Data

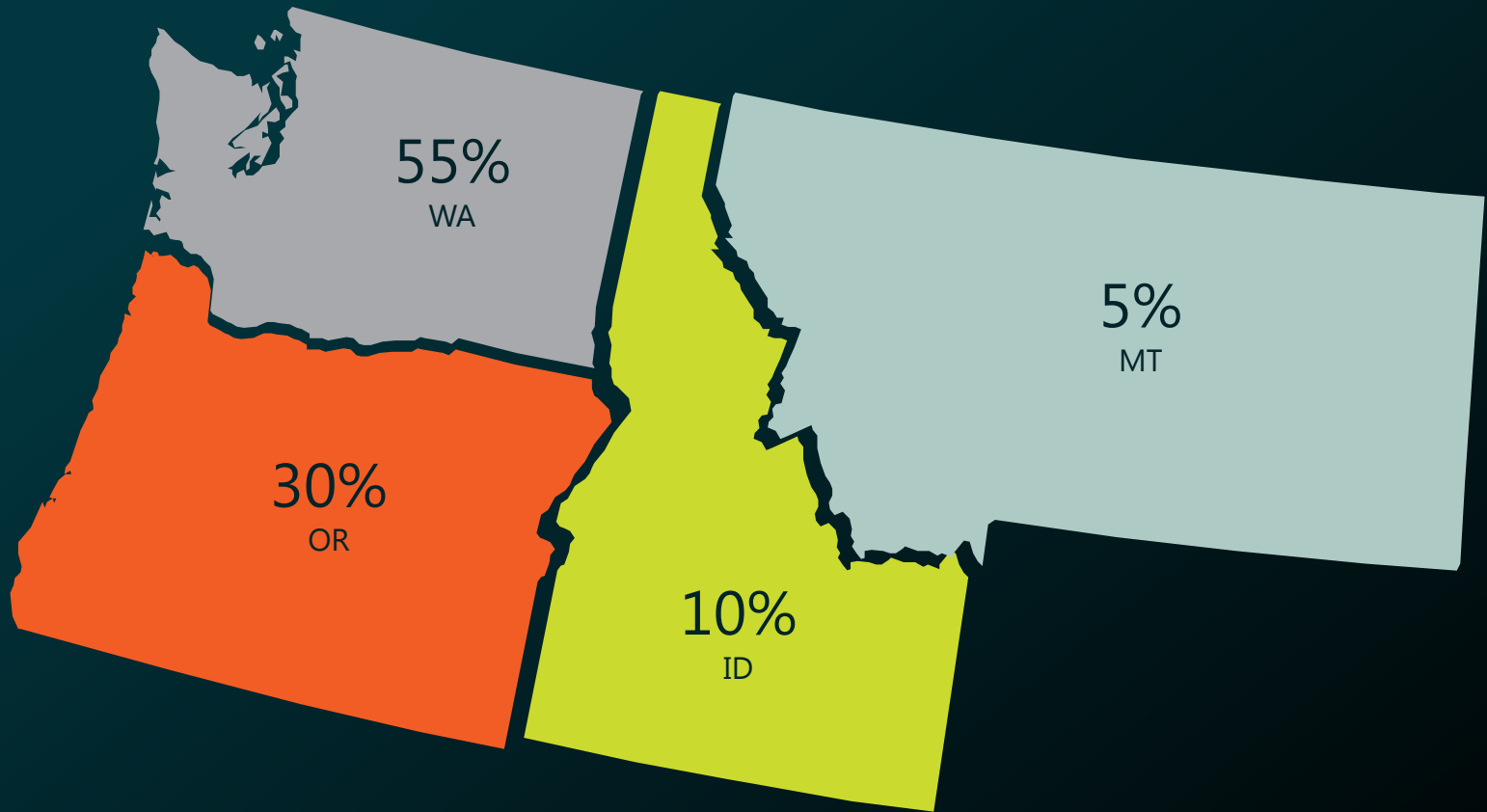


Interviews

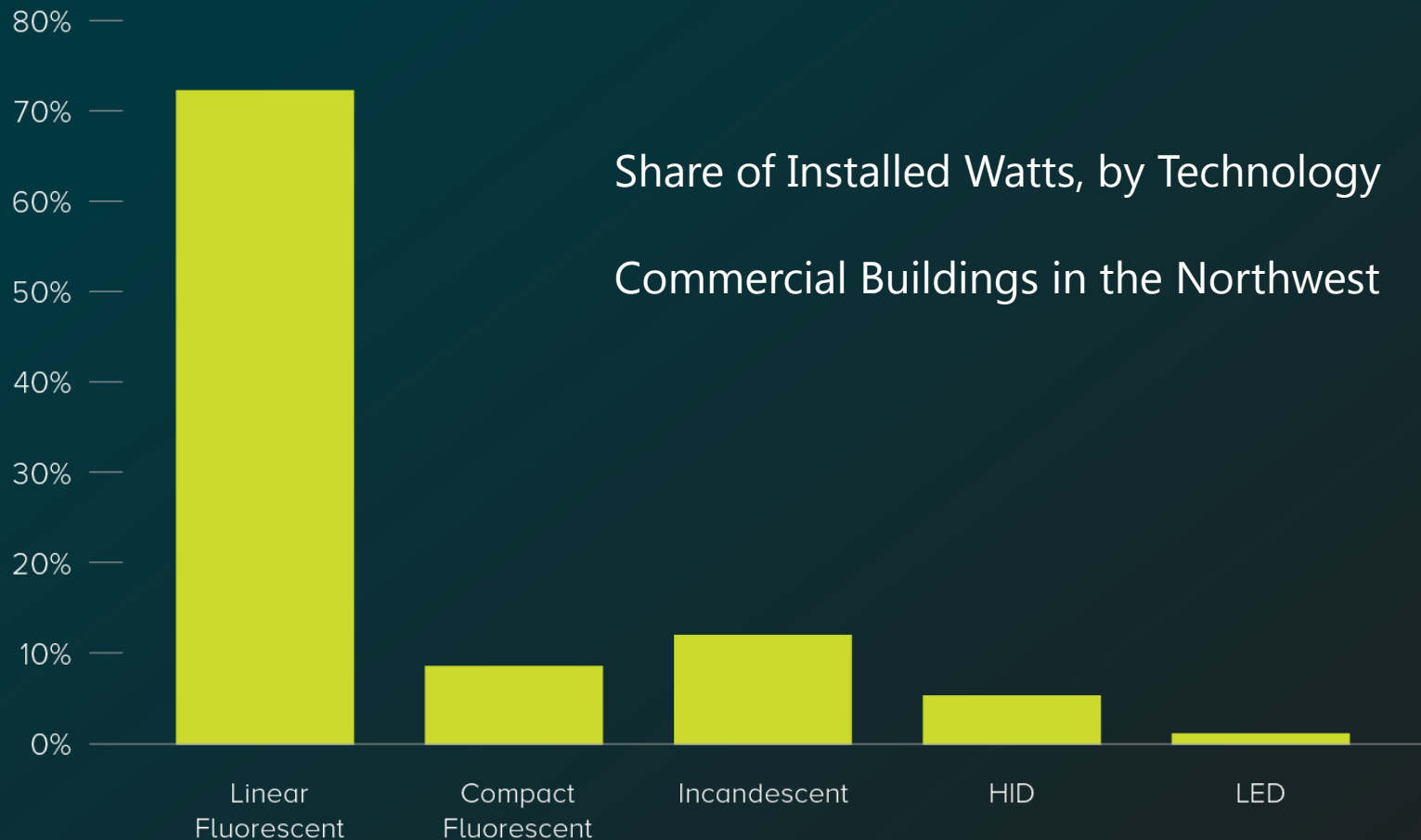


Conferences

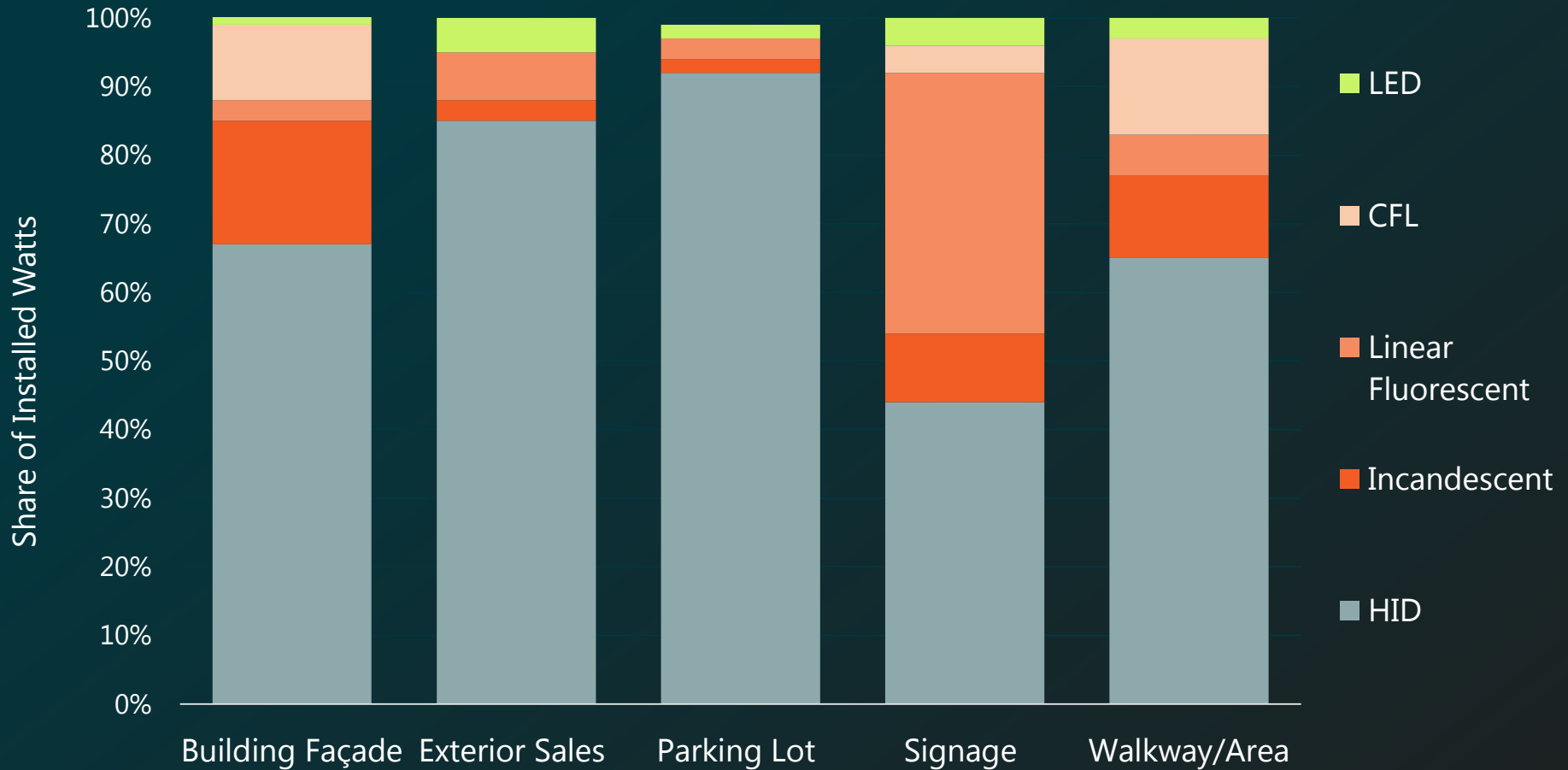
Distributor Branches, by State



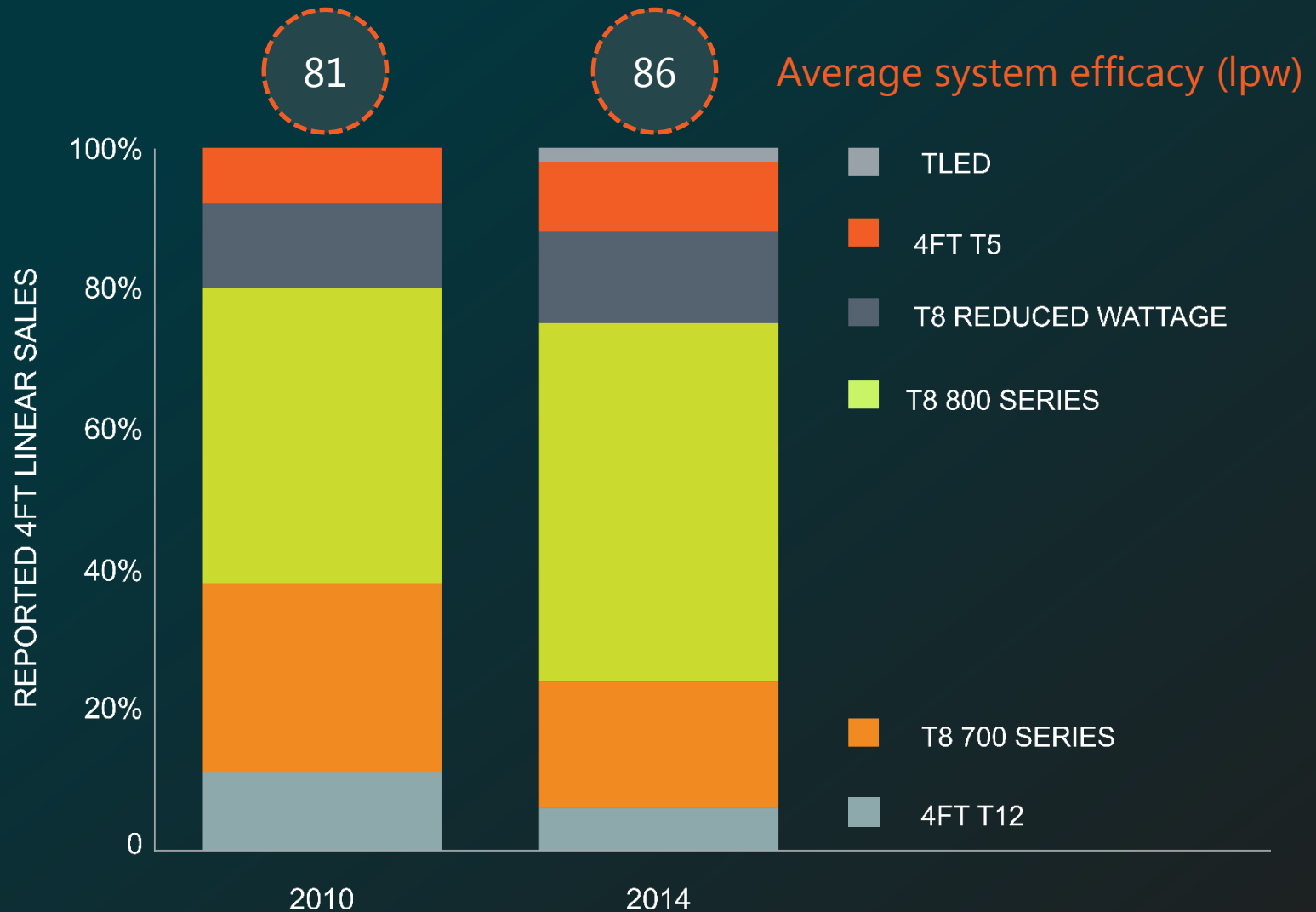
Linear Fluorescent Dominate Stock



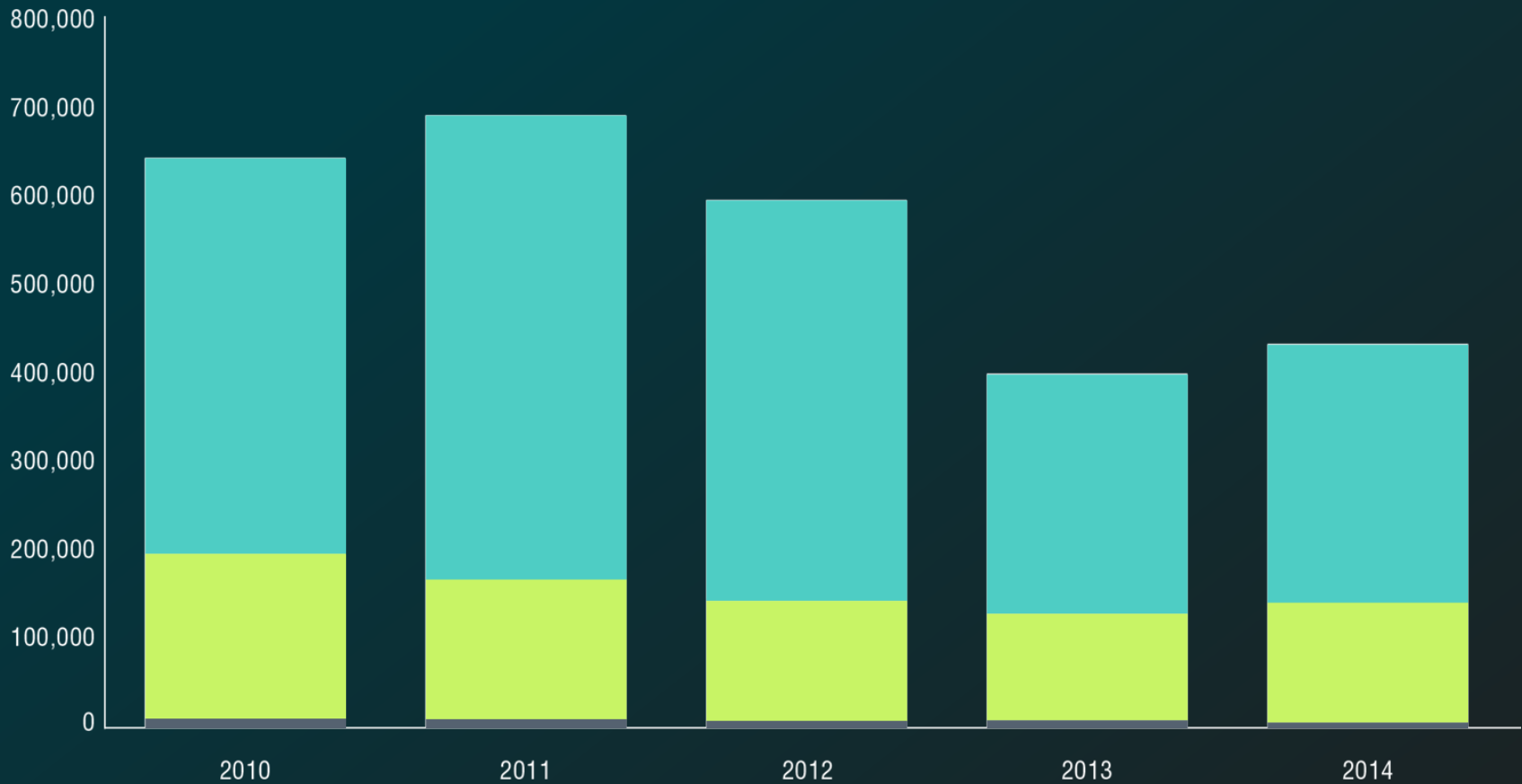
Opportunity in Outdoor Remains



Linear Lamps Sales Mix

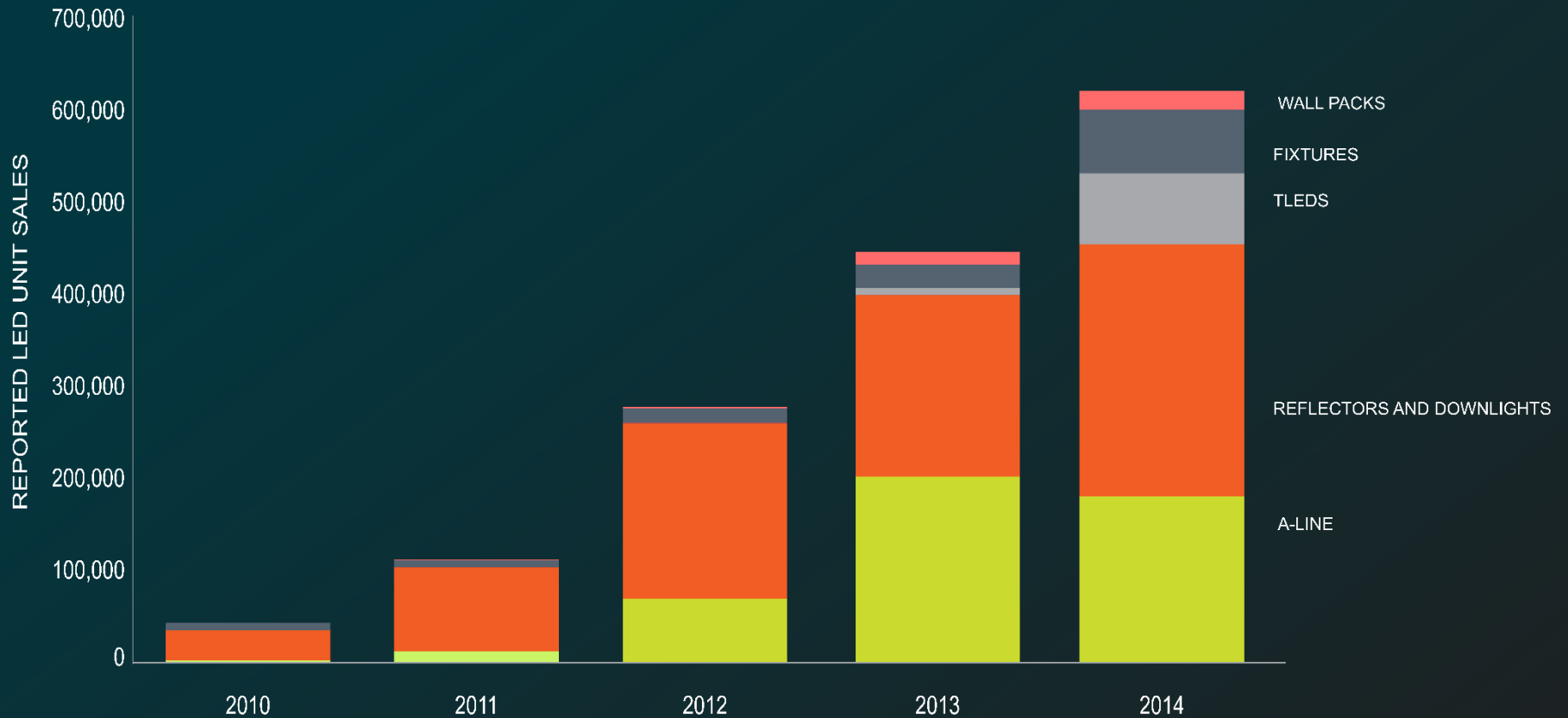


HID Sales Declining

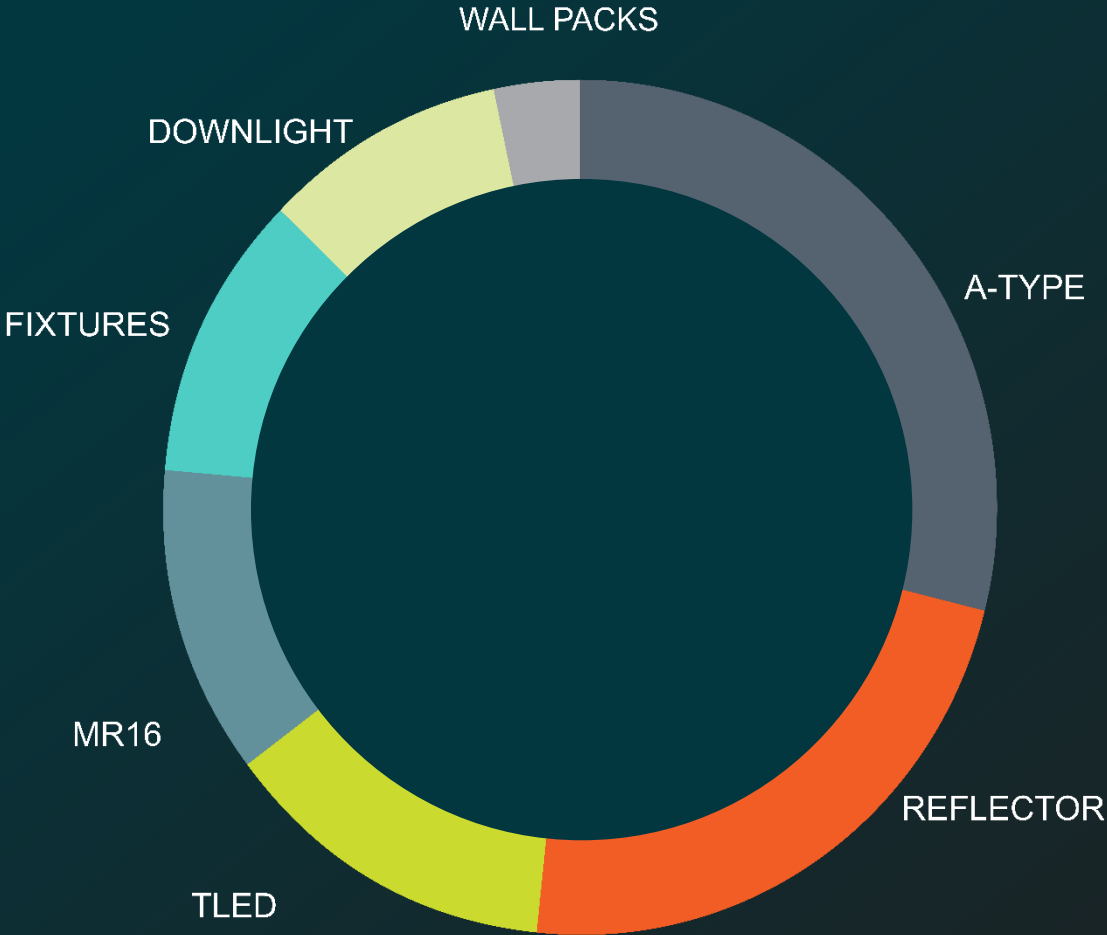


- METAL HALIDE
- HIGH PRESSURE SODIUM
- MERCURY VAPOR

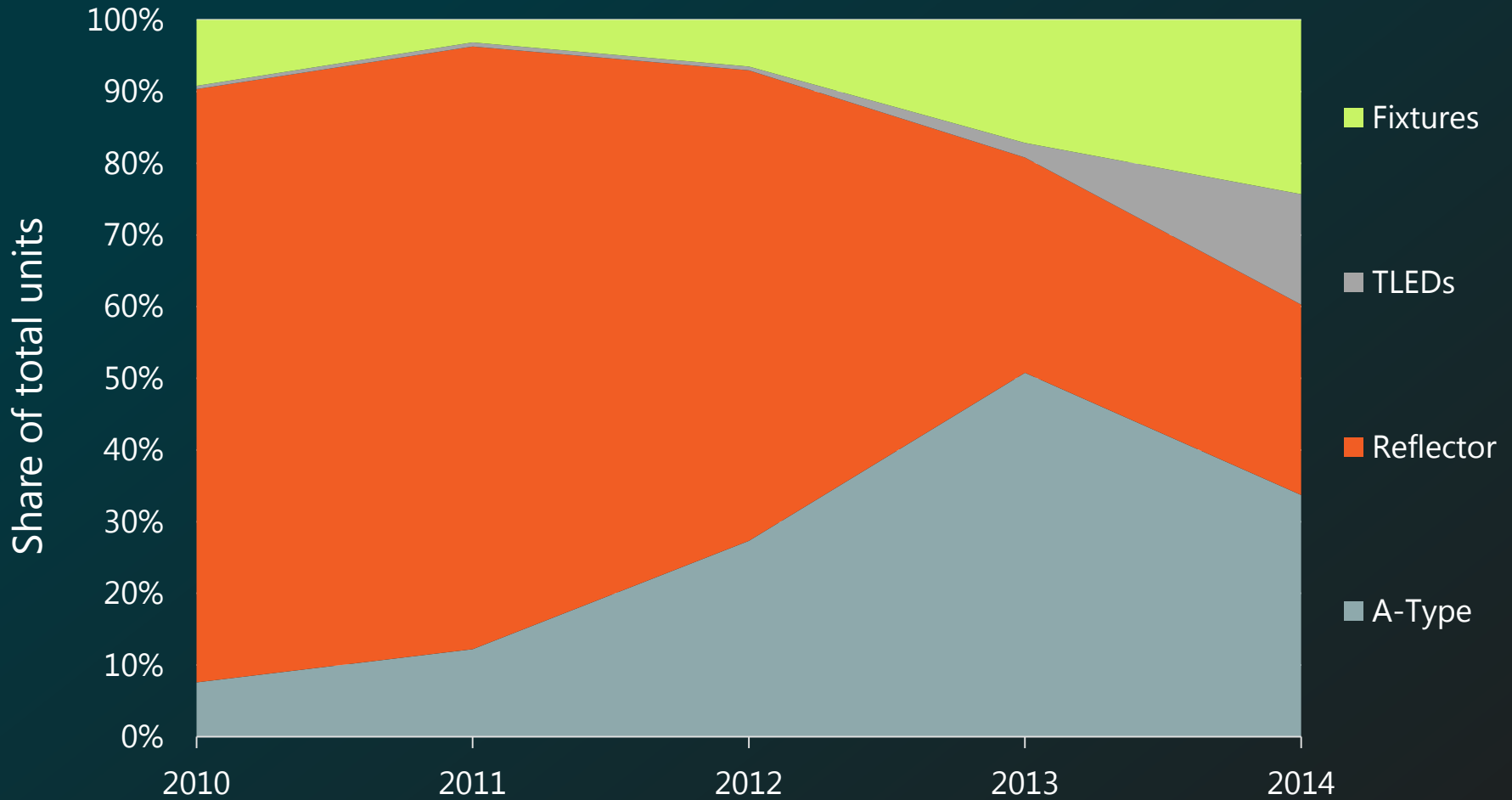
No Surprise: LED Sales



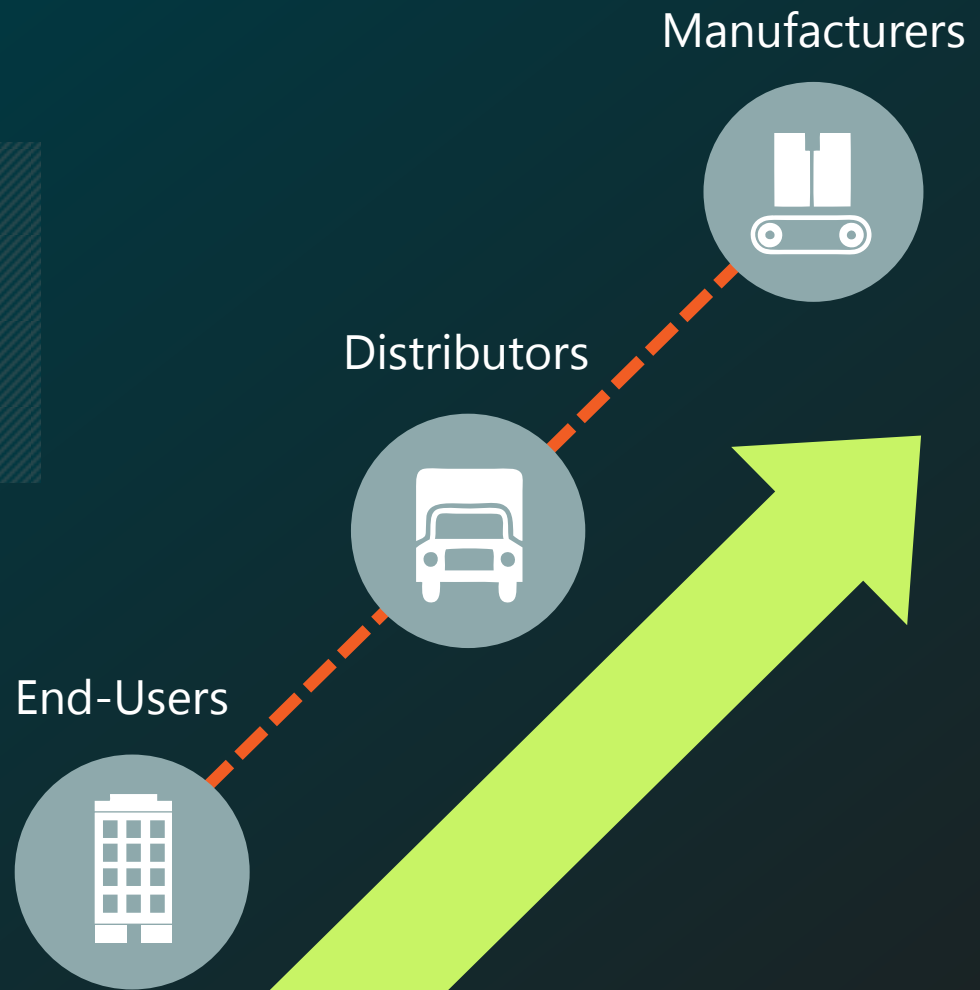
2014 LED Sales



LED Sales 2010-2014



Programs are
moving **upstream**



What percentage of your LED sales do not go through utility incentive programs?

Small Distributors

"Virtually none"

"Less than 10%"

10%

10%

10%

20%

30%

30%

"in excess of 30%"

99%

Medium Distributors

"less than 5%"

Large Distributors

"Barely any"

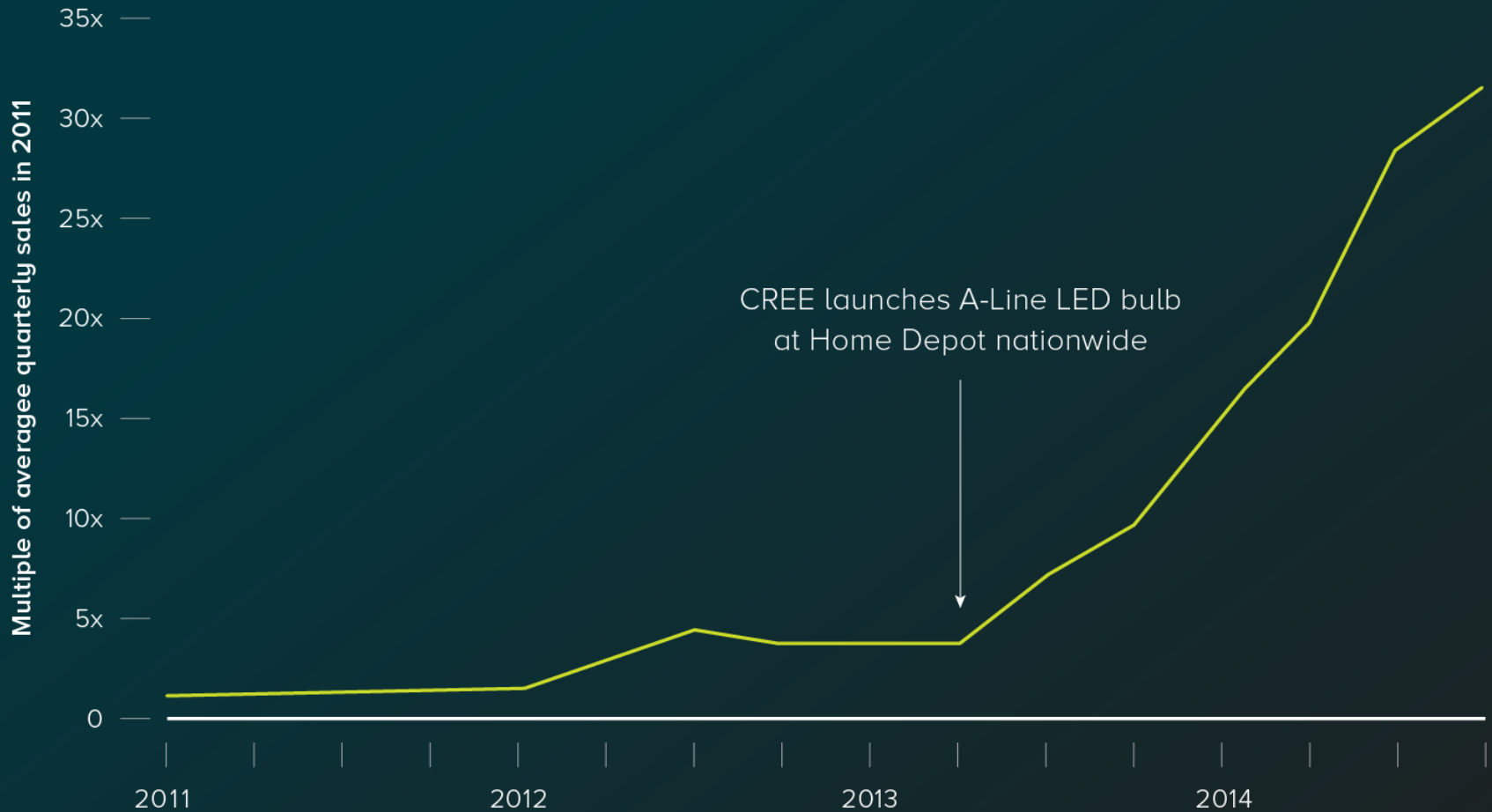
25-30%

50%

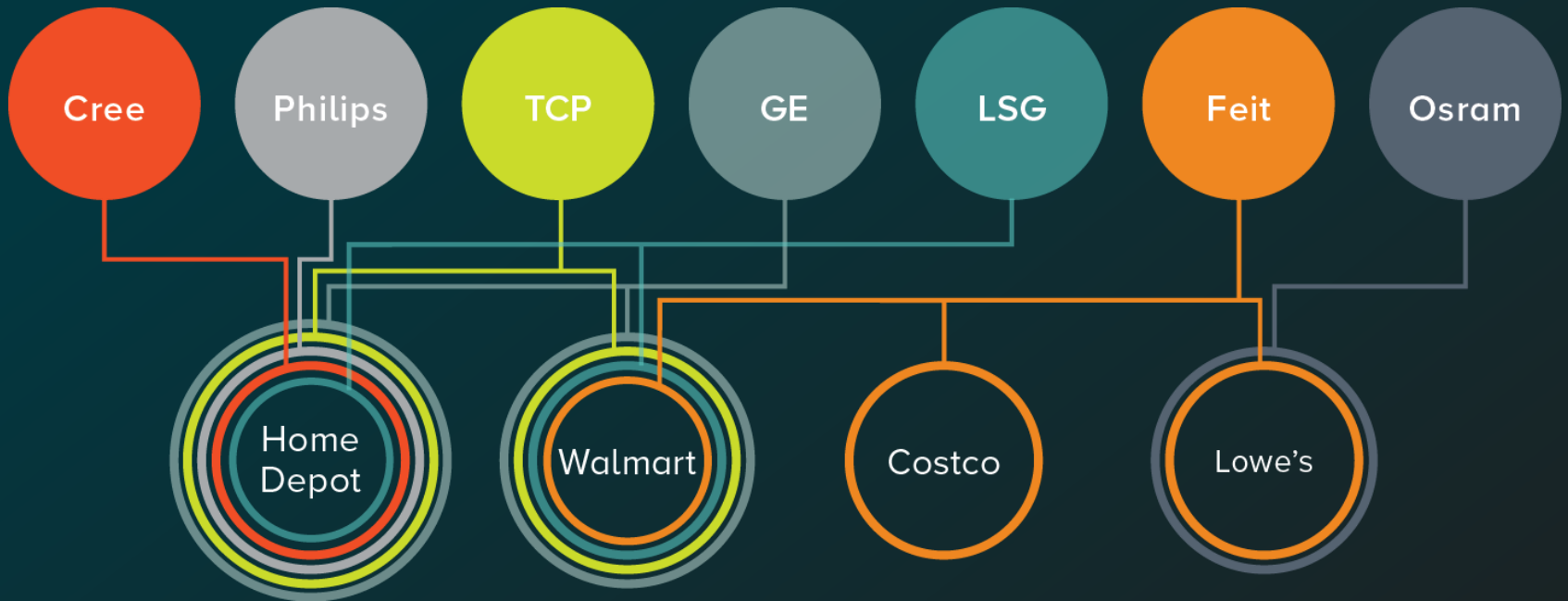
50%

"at least 90%"

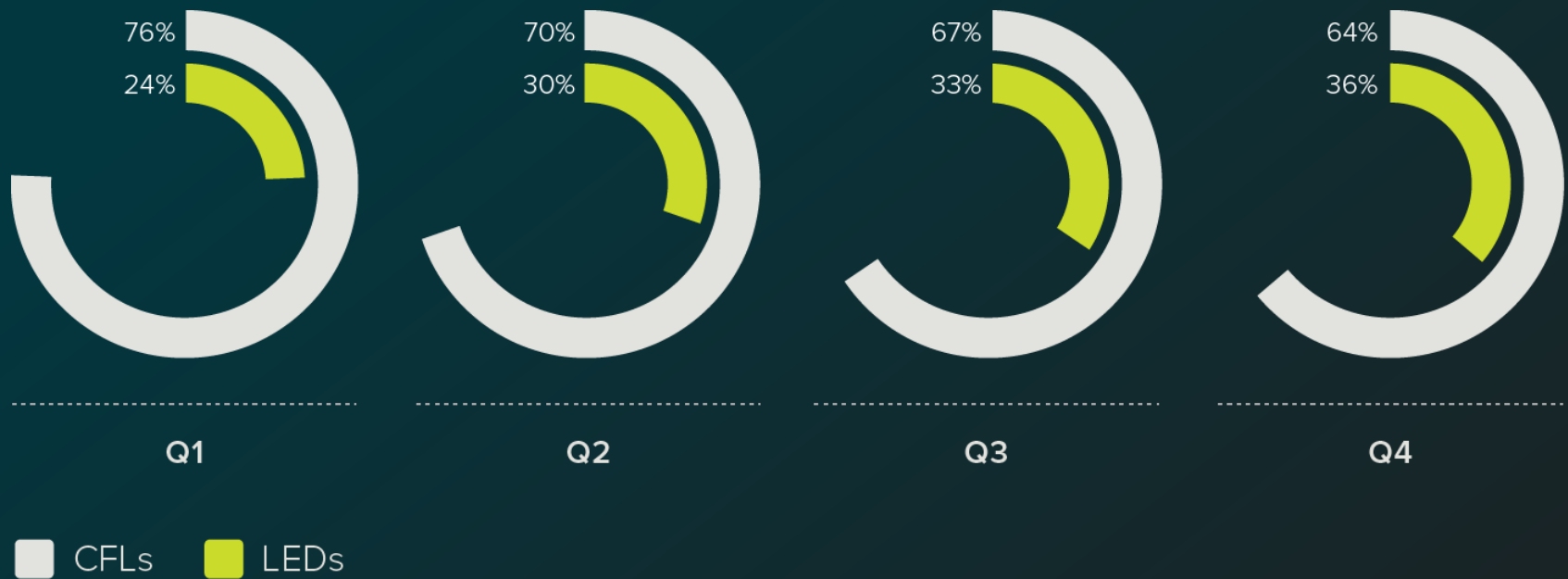
The Power Of Retail



60W LED A-Line Supply



CFL/LED Retail Sales Mix 2014



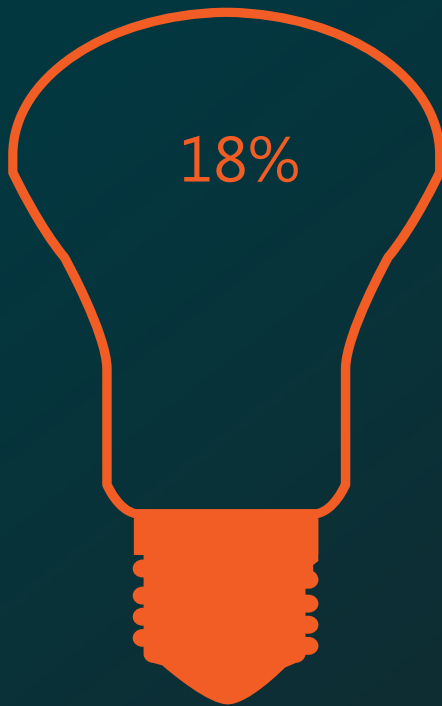
2014 Retail Sales Technology Mix

GENERAL PURPOSE - EISA LUMEN BINS

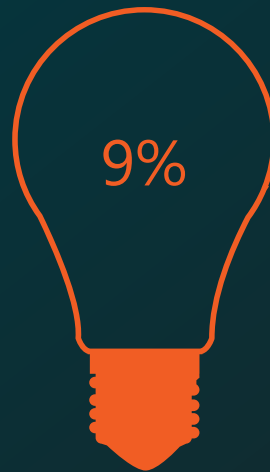
TECHNOLOGY	<310	310-749	750-1049	1050-1489	1490-2600	>2600
INC	83%	31%	7%	6%	3%	73%
HAL	5%	41%	30%	51%	32%	0%
CFL	5%	15%	48%	38%	61%	18%
LED	8%	13%	14%	5%	5%	9%
TOTAL	100%	100%	100%	100%	100%	100%

Uneven LED penetration in Retail

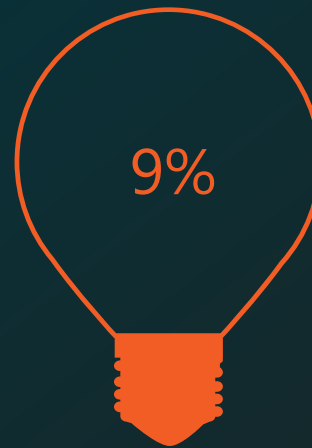
Reflectors



General Purpose



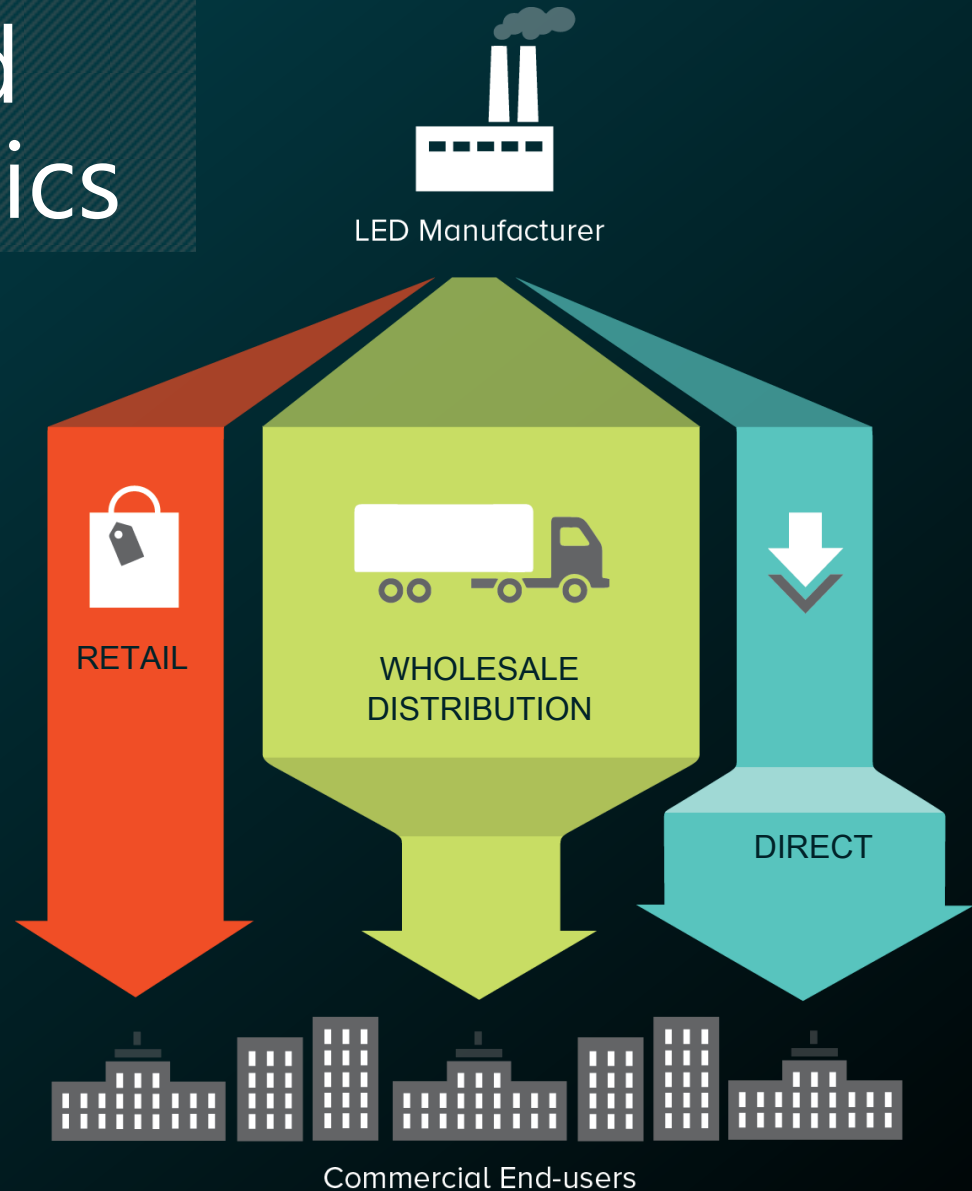
Globe



Decorative and mini-base



New supply and demand dynamics





New players

“I’ve been in this industry 35 years. I’ve never heard of any of these companies.”

- Manufacturer at Lightfair 2015

From Widgets to Systems

Full-system retrofits increasing

LED luminaires most efficient and reliable when all components designed together

Integrated systems have more to offer to end-user

