

A graphic in the top left corner features two overlapping light blue beams of light that fan out towards the right. Within the beams are several white circles of varying sizes, some overlapping each other, creating a sense of depth and light rays.

Reality Check: Using Market Analysis to Illuminate Nonresidential Lighting Opportunities

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market perspective



How much has the market
already transformed?

How quickly has this
change happened?

Non-
residential
lighting

How much potential
remains?

Where can programs still
be effective?

total market model



**All Lamps and Fixtures in
Major Non-Residential
Applications**

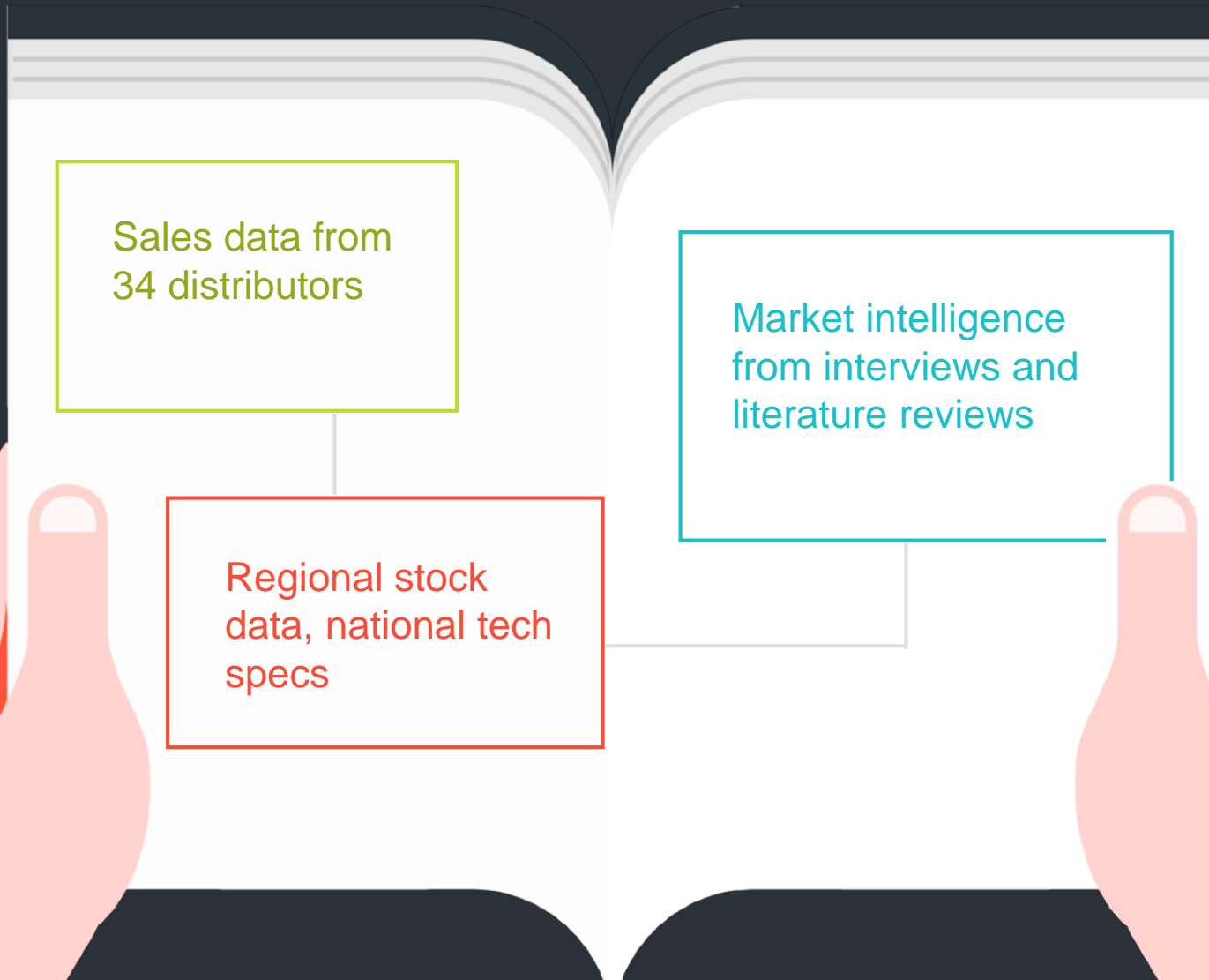


**Stock Turnover
Approach**

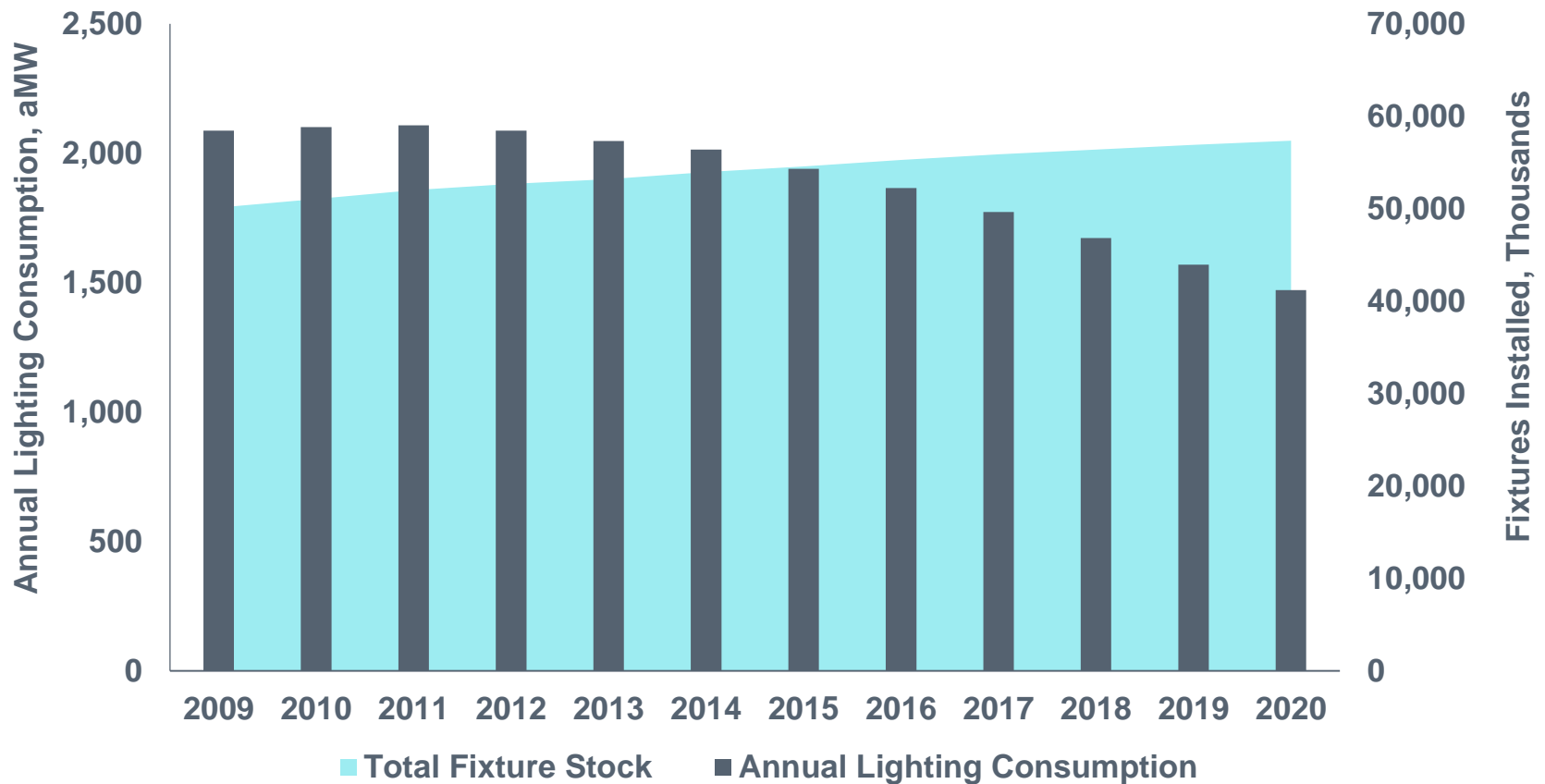


**Six Year Savings Horizon
With Forecast**

connecting numerous data sources

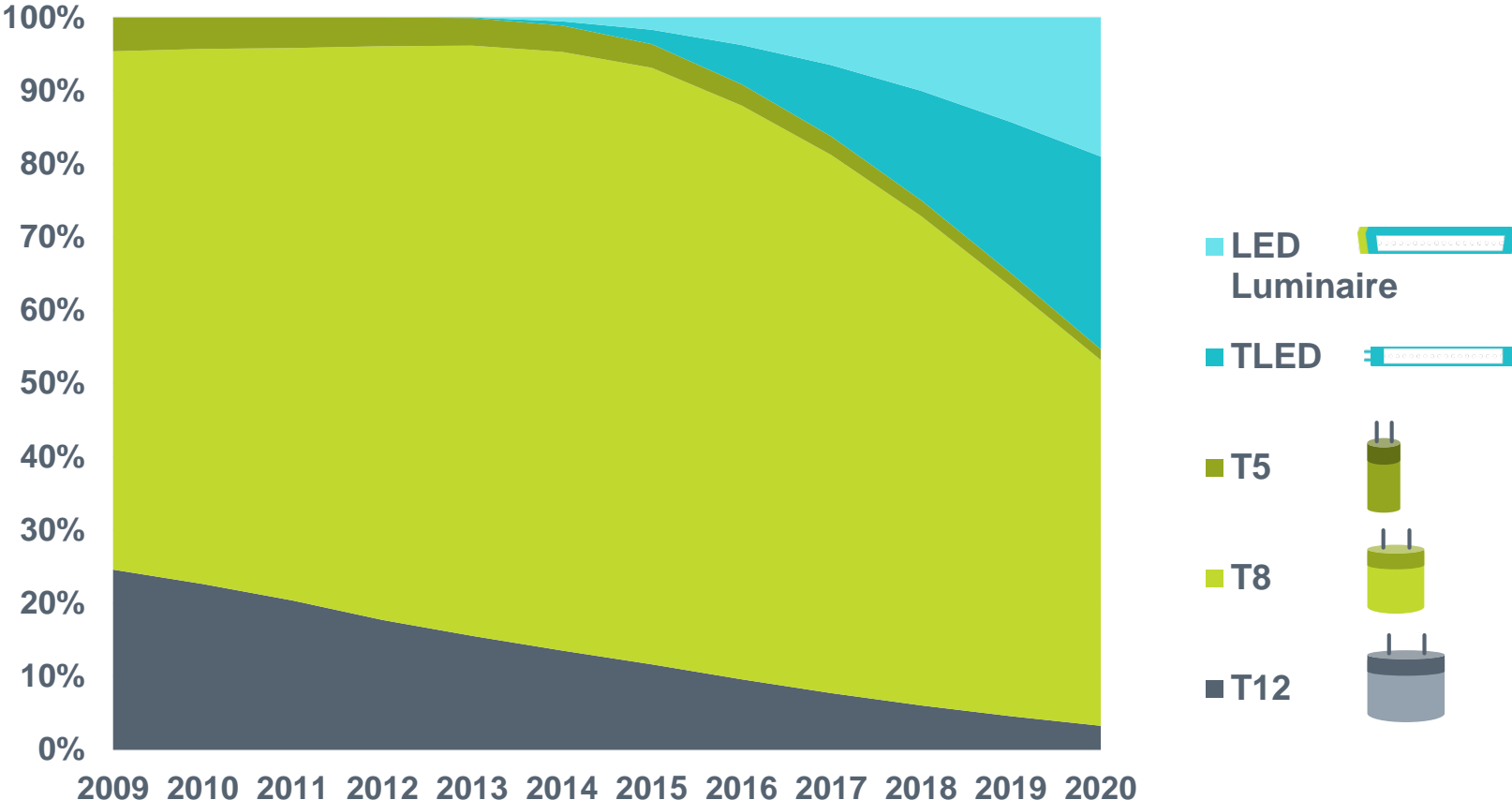


decreasing consumption & increasing growth



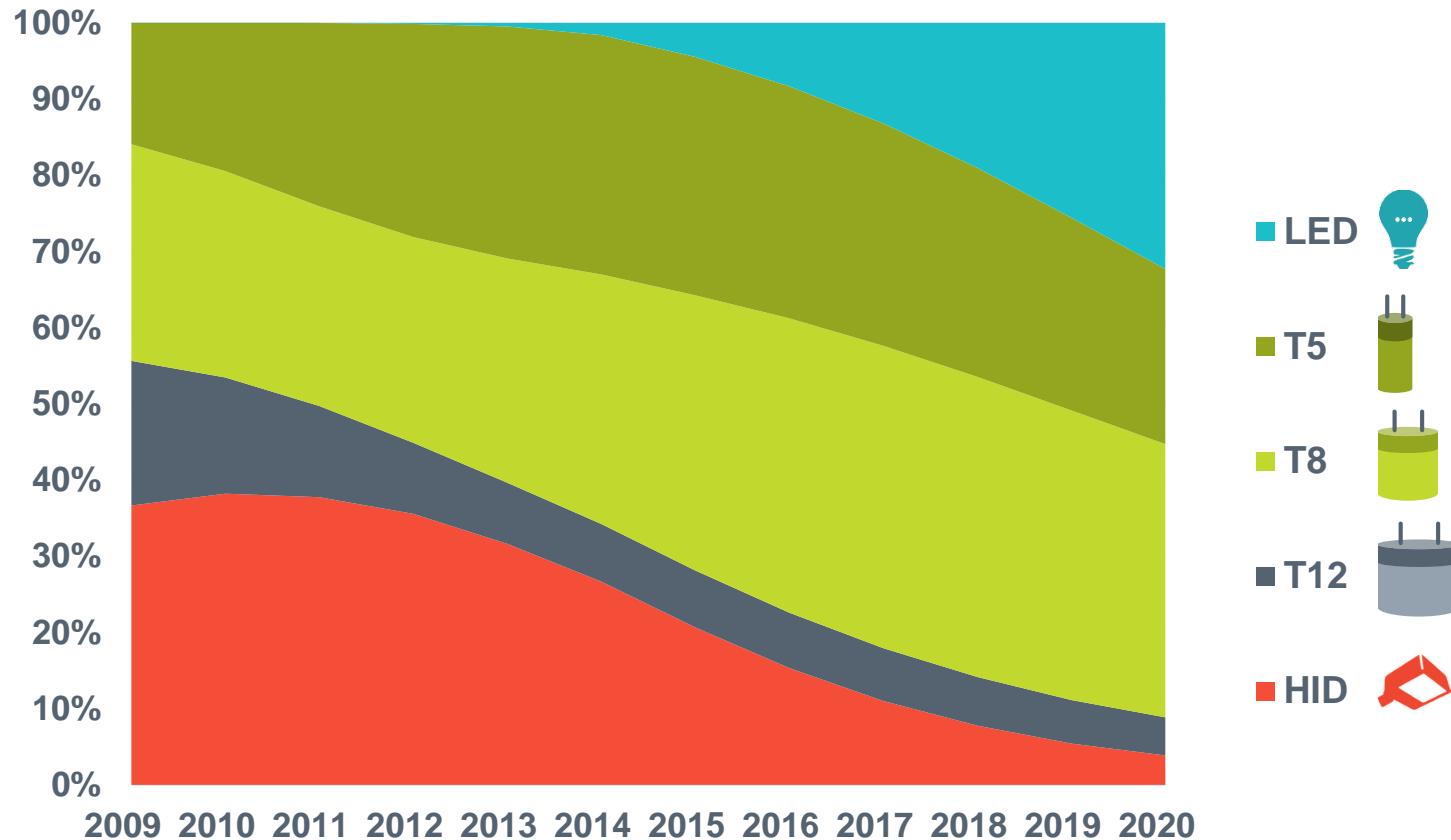
better linear fluorescents

Ambient Linear Installed Fixture Mix



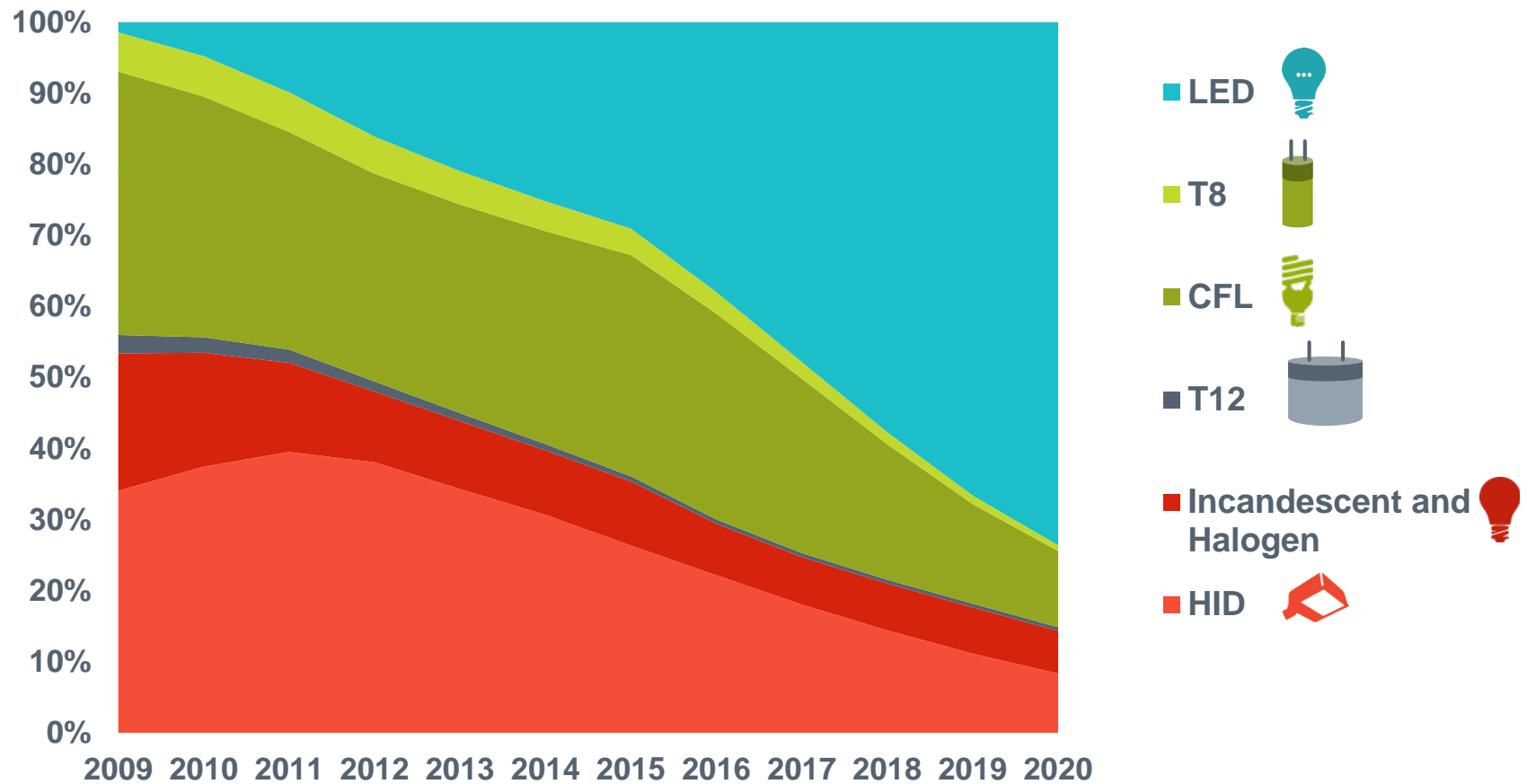
HID in decline

High/Low Bay Installed Fixture Mix



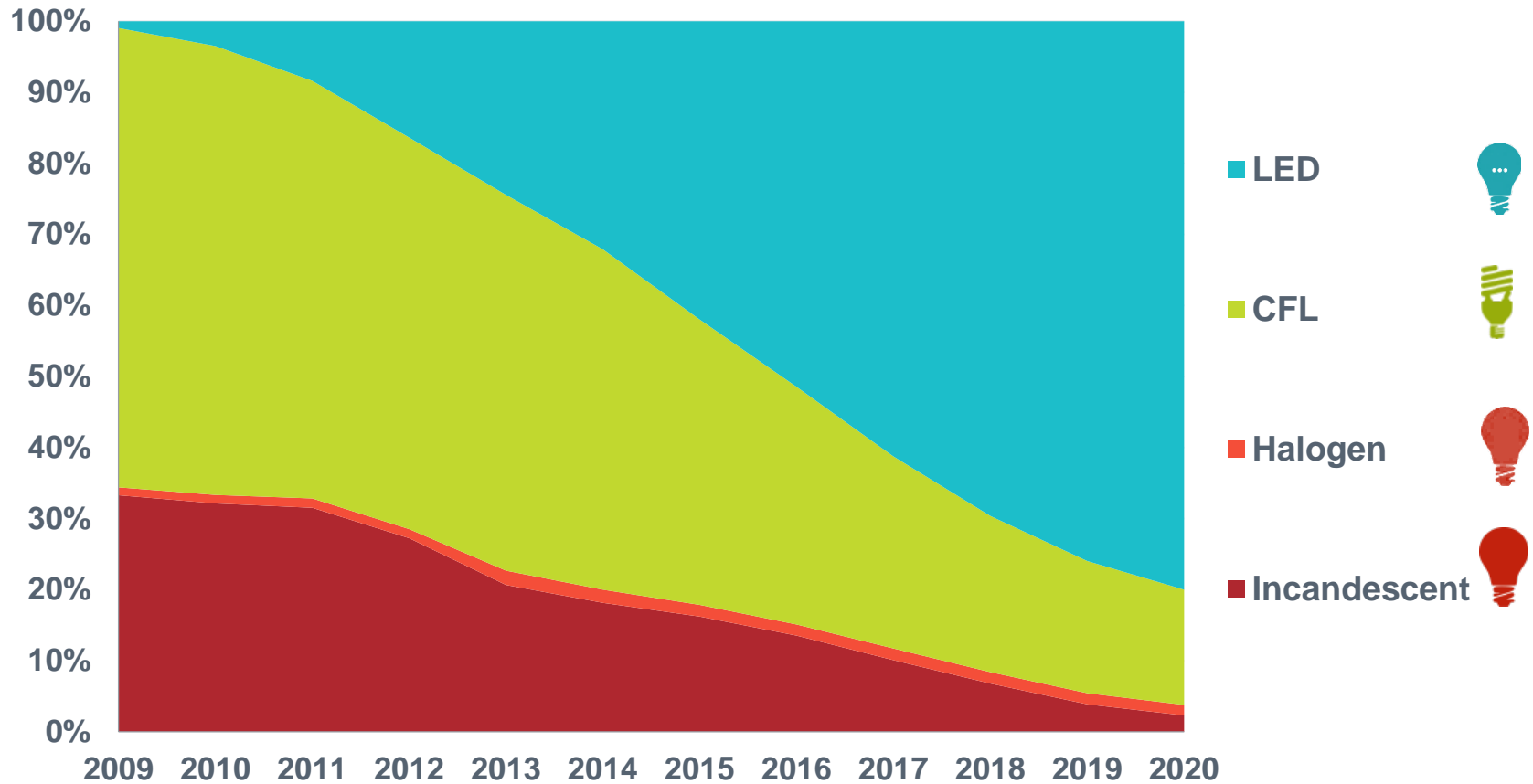
more LED

Building Exterior Installed Fixture Mix



more LED

General Purpose Installed Fixture Mix



where is the LED action?



- Outdoor lighting
- Screw-in applications
- Commercial sector



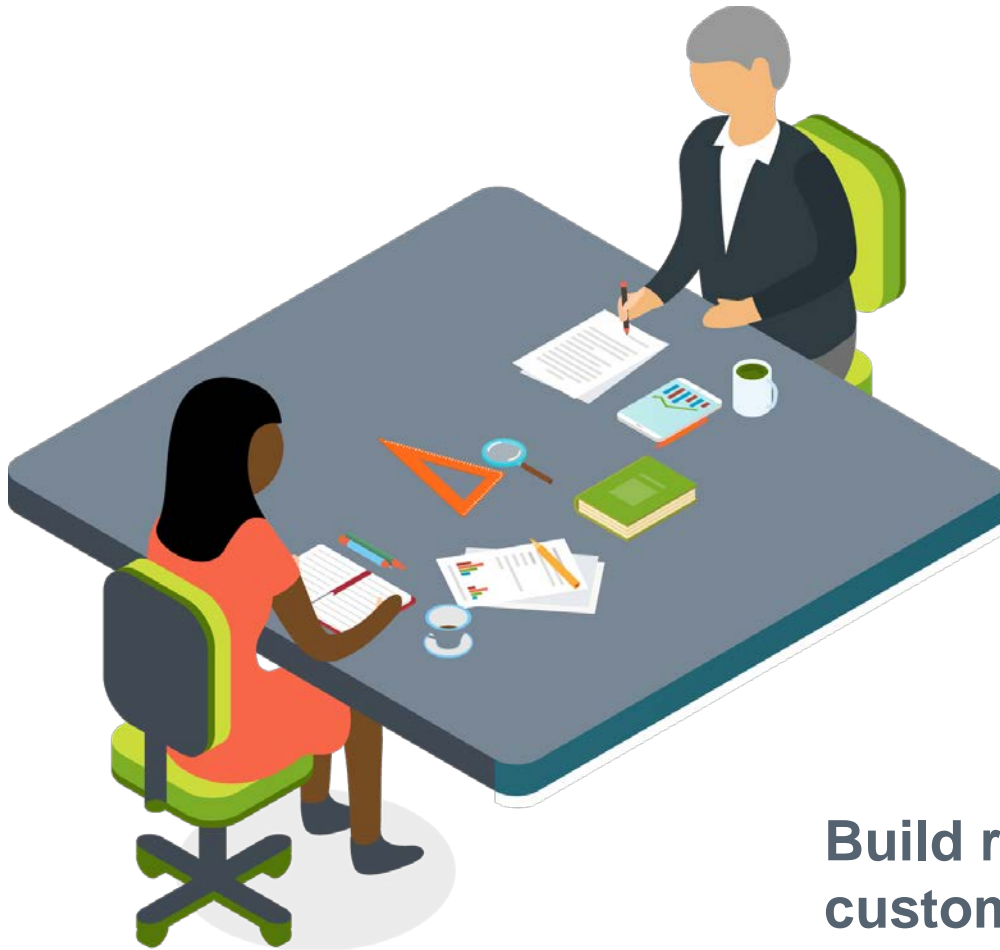
- Ambient Linear
- High and Low Bay
- Industrial sector

target aesthetic turnover

**Highlight decorative and vintage
LED options for customer-facing
spaces with high lighting turnover**



be there at decision time



Build relationships with industrial customers to spur conversion when the right moment arrives

think long term

Find ways to support market actors
switching to lighting design strategy
business models



how can you help?

more frequent
stock
assessments

additional
research on
lifetime and
turnover
characteristics

integrating
efficiency trends
into load
forecasting

update programs
to respond to
market changes

total market
modeling in other
regions

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