Five Reasons Why Lighting Programs Still Make a Difference

PREPARED FOR THE 2017 ENERGY STAR PARTNER MEETING
OCTOBER 23, 2017
Should Program Administrators Continue to Support Efficient Lighting?
The Key Question

LED Market Share

Program intensity
Reason #1: LED Sales in States with Programs Significantly Outperform States Without Programs
Reason #2: ENERGY STAR LEDs are Battling for Market Share with Non-ENERGY STAR Lamps

LED Market Share

<table>
<thead>
<tr>
<th></th>
<th>Program State</th>
<th>No Program States (aggregate)</th>
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</thead>
<tbody>
<tr>
<td>ES LEDs</td>
<td>61%</td>
<td>42%</td>
</tr>
<tr>
<td>NON ES LEDs</td>
<td>39%</td>
<td>58%</td>
</tr>
</tbody>
</table>
Reason #3: ENERGY STAR LEDs Still Cost More Than Other Options

- ES LED: $5.24
- NON-ES LED: $3.37
- CFL: $2.32
- Halogen: $1.57
- Incandescent: $1.43
Reason #4: Incandescent Lamps Continue to Have Substantial Market Share
Reason #4b: Incandescent Lamp Share is Even Higher for Selected Channels

![Bar Chart]

POS Channels (grocery, drug, dollar, discount, mass merchandiser)
Non-POS Channels (home improvement, club)
Reason #5: There is Evidence of Backsliding in States that Have Cut Programs
And a Bonus Reason: Continued Uncertainty over EISA
Questions?

Please Contact:
Scott Dimetrosky
Apex Analytics
scottd@apexanalyticsllc.com
(303)590-9888, x101