



# PROGRESS<sup>®</sup> LIGHTING



## California T-24 and Its Impact on the Lighting Market

Manufacturer's Perspective  
Energy Star Lighting Partners Mtg

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## T-24 Opportunities for Manufacturers

- Limited sales volume of Energy Star fixtures has prompted hesitation to stock Energy Star fixtures for large manufacturers
- T-24 gives the manufacturers instant demand and a tangible reason to offer additional energy efficient products
- Increased demand in California should also spur the development of new lamp and ballast technology
- For the Energy Star program in general, T-24 should spark a significant increase in the energy efficient products that are available from manufacturers



## T-24 Opportunities for Manufacturers

- The increase of customer demand through legislation will further the advance the sales of fluorescent fixtures nationally
- Legislation should also increase margins in the state of CA as fluorescent fixtures are generally more expensive than the INC counterparts
- Certain areas will represent specific challenges ....



Particular areas will represent challenges for manufacturers and their customers:

1. Recessed Fixtures
2. Closets
3. Hallways/small foyers
4. Bathroom
5. Outdoor

## Title 24 & impact on the Lighting market – Manufacturer's Perspective

### Challenges for Manufacturers

#### Kitchen Areas

- Code Requirements
  - *At least 50% of installed wattage must be high efficacy. Lighting in areas adjacent to the kitchen (i.e. Nook) is considered kitchen lighting if it is on the same switch as the kitchen lighting.)*

### • Recessed Fluorescent Fixtures



Incandescent

to



Fluorescent

- Development of higher wattage recessed fixtures to provide equivalent replacement for Inc fixtures
- Recessed fluorescent fixtures increased cost to customers over Inc



## Title 24 & impact on the Lighting market – Manufacturer's Perspective

### Challenges for Manufacturers

- Recessed Fixtures – multi-level



Incandescent

to



Fluorescent, Air-Tight

- Development of recessed fluorescent Fire-rated designs for multi-level dwellings
- Air-Tight designs required for all recessed products





## Title 24 & impact on the Lighting market – Manufacturer's Perspective

### Challenges for Manufacturers

- Closets



Incandescent

to



Fluorescent

Other interior spaces (Dining, Living, Bedroom, Foyer, etc.)

- Code Requirements
  - *Lighting fixtures must be high-  
efficacy or controlled by a manual-  
on/automatic off occupancy sensor  
or controlled by a dimmer.*

- Typical inexpensive closet fixtures will have to be changed to fluorescent
- Linear fluorescent represents lowest cost alternative, but still double the previously used fixture cost. Also lensed fluorescent is required for some applications by code
- Many builders don't like the look of basic strips, but can't afford a decorative fluorescent fixture for a closet



## Title 24 & impact on the Lighting market – Manufacturer's Perspective

### Challenges for Manufacturers

- Hallways ( and small foyers in apartments)



Incandescent

to



Fluorescent

Other interior spaces (Dining, Living, Bedroom, Foyer, etc.)

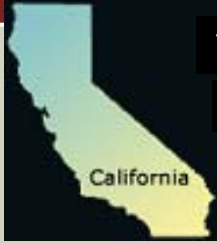
- Code Requirements
  - *Lighting fixtures must be high-  
efficacy or controlled by a manual-  
on/automatic off occupancy sensor  
or controlled by a dimmer.*

- Apartments and small homes will typically not want to use Itg controls for these areas
- Typical inexpensive hallway/small foyer fixtures will have to be changed to fluorescent
- Fluorescent styles are bigger in diameter and more expensive than the Inc counterparts. This represents particular problems for apartments

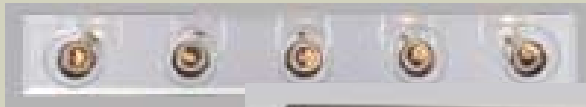


# Title 24 & impact on the Lighting market – Manufacturer's Perspective

## Challenges for Manufacturers



### Bathrooms



Incandescent

to



Fluorescent



OR



Incandescent  
w/sensor

- Typical Broadway bars will have to be changed to fluorescent or use a sensor control
- Fluorescent is not pleasing to most customers for bathroom light, decorative options not as plentiful
- Most customers will likely opt for occupancy sensors with Inc fixtures
- Sensors represent potential for callbacks and complaints due to their operation.



## Title 24 & impact on the Lighting market – Manufacturer's Perspective

### Challenges for Manufacturers

- Outdoor



Incandescent

to



Incandescent w/ sensor



Fluorescent

- There is much pressure on manufacturers to come up with more fluorescent and combination Inc/sensor designs for use in California. Many of these must be inexpensive to replace previous Inc fixture specifications
- Some California customers will want lights to stay on for security and entertaining
- Builders are confused as to which way to go, manufacturing has to guess
- Price will likely determine market



## Title 24 & impact on the Lighting market – Manufacturer's Perspective

Complete package options for each area



Kitchen



Bathroom  
Garage  
Laundry  
Utility



Other Interior Rooms  
[Dining, Hallway, etc.]



Outdoor





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