California T-24 and Its Impact on the Lighting Market

Manufacturer’s Perspective

Energy Star Lighting Partners Mtg

April 5, 2005

Chris Primous
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 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
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.

Challenges for Manufacturers

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

Incandescent

Fluorescent
Title 24 & impact on the Lighting market – Manufacturer’s Perspective

Challenges for Manufacturers

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

Incandescent

to

Fluorescent, Air-Tight
Title 24 & impact on the Lighting market – Manufacturer’s Perspective

Challenges for Manufacturers

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
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 ltg 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

  - 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.
**Challenges for Manufacturers**

- **Outdoor**
  - 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.

---

*Images of light fixtures:*
- Incandescent
- Incandescent with sensor
- Fluorescent

---

**Title 24 & impact on the Lighting market – Manufacturer’s Perspective**

**Challenges for Manufacturers**
Complete package options for each area

Kitchen

Bathroom
Garage
Laundry
Utility

Other Interior Rooms
[Dining, Hallway, etc.]

Outdoor