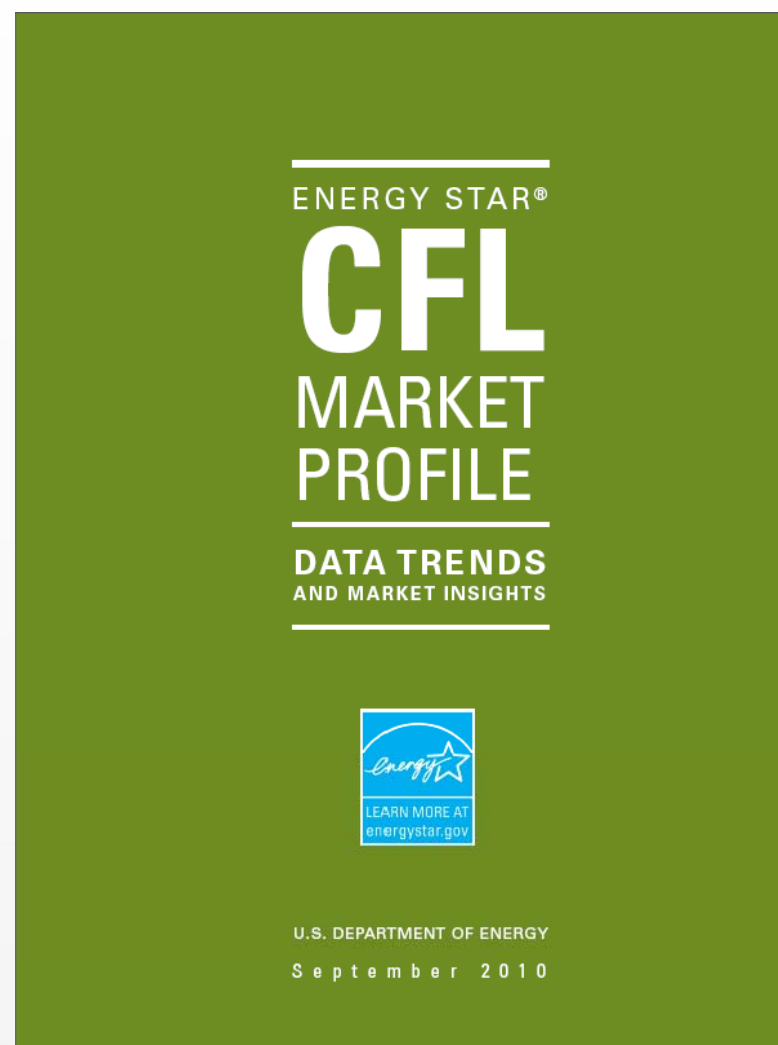




2010 CFL Market Profile

Stephen Bickel
D&R International
October 4, 2010





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Key Insights

- Still plenty of savings in general service CFLs and utilities need to capture them
- Sales are dropping even though sponsor spending is rising
- Net to Gross ratios and methodologies are a problem for some could become one for many
- People like CFLs and appear to put them wherever a bulb burns out
- Residential lamps, including CFLs, are used about 1.9 hrs/day
- No clear answers but suggestive data on why so many purchases are incandescents



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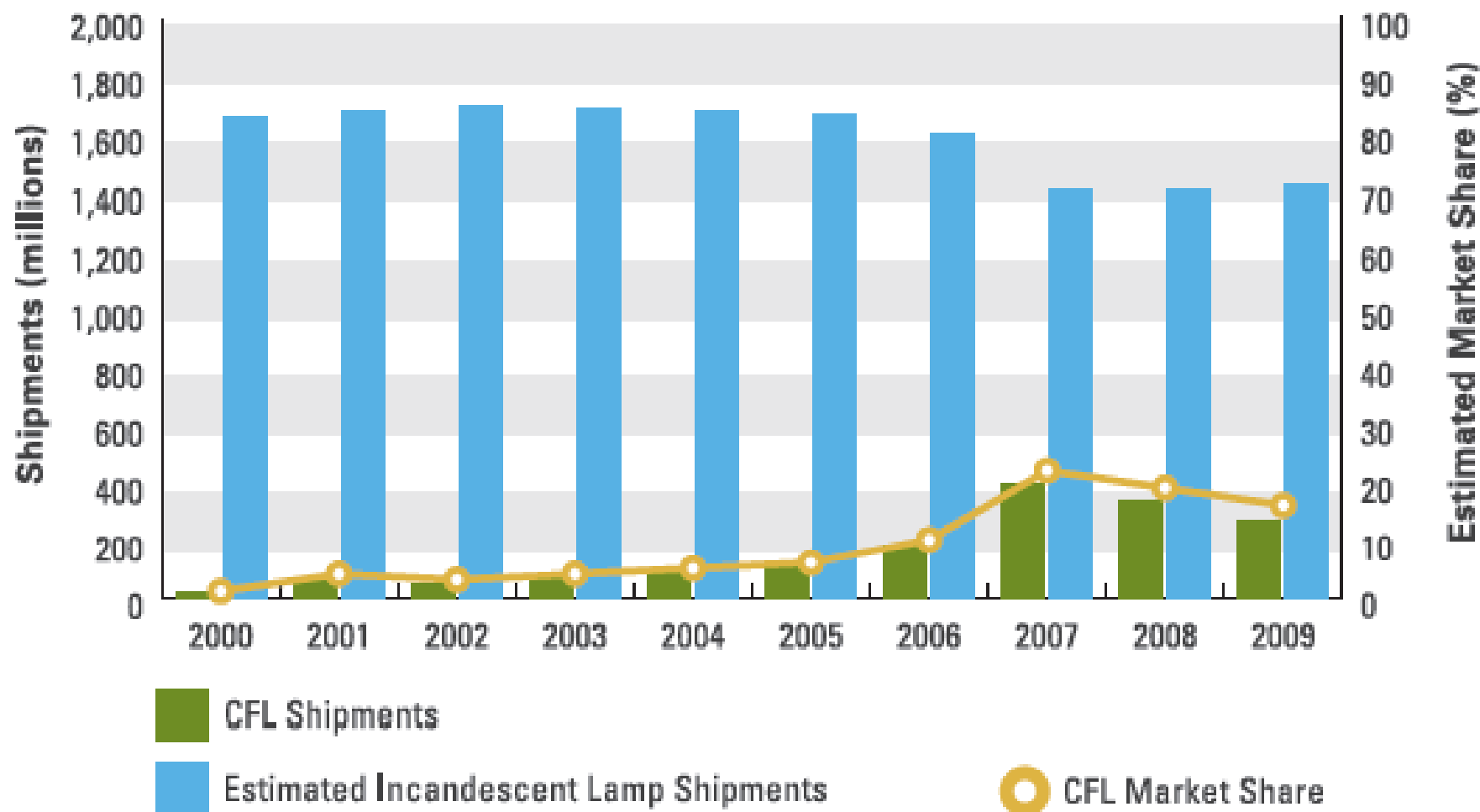
CFLs deliver savings

Program	Share of Total DSM Savings from CFL Programs (%)
NYSERDA	24
California	53
Vermont	39
Massachusetts	52



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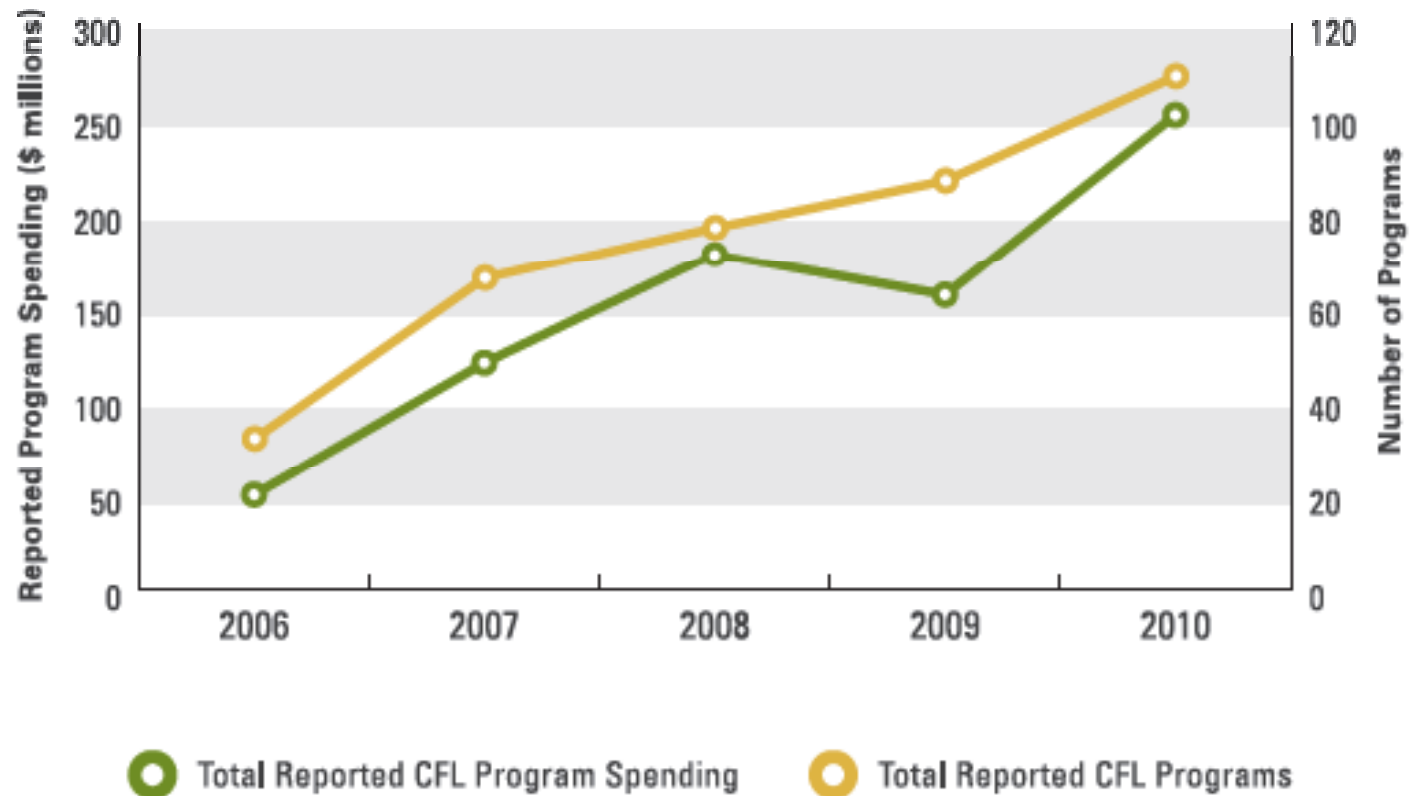
... but CFL shipments are down.





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CFL program spending is increasing...





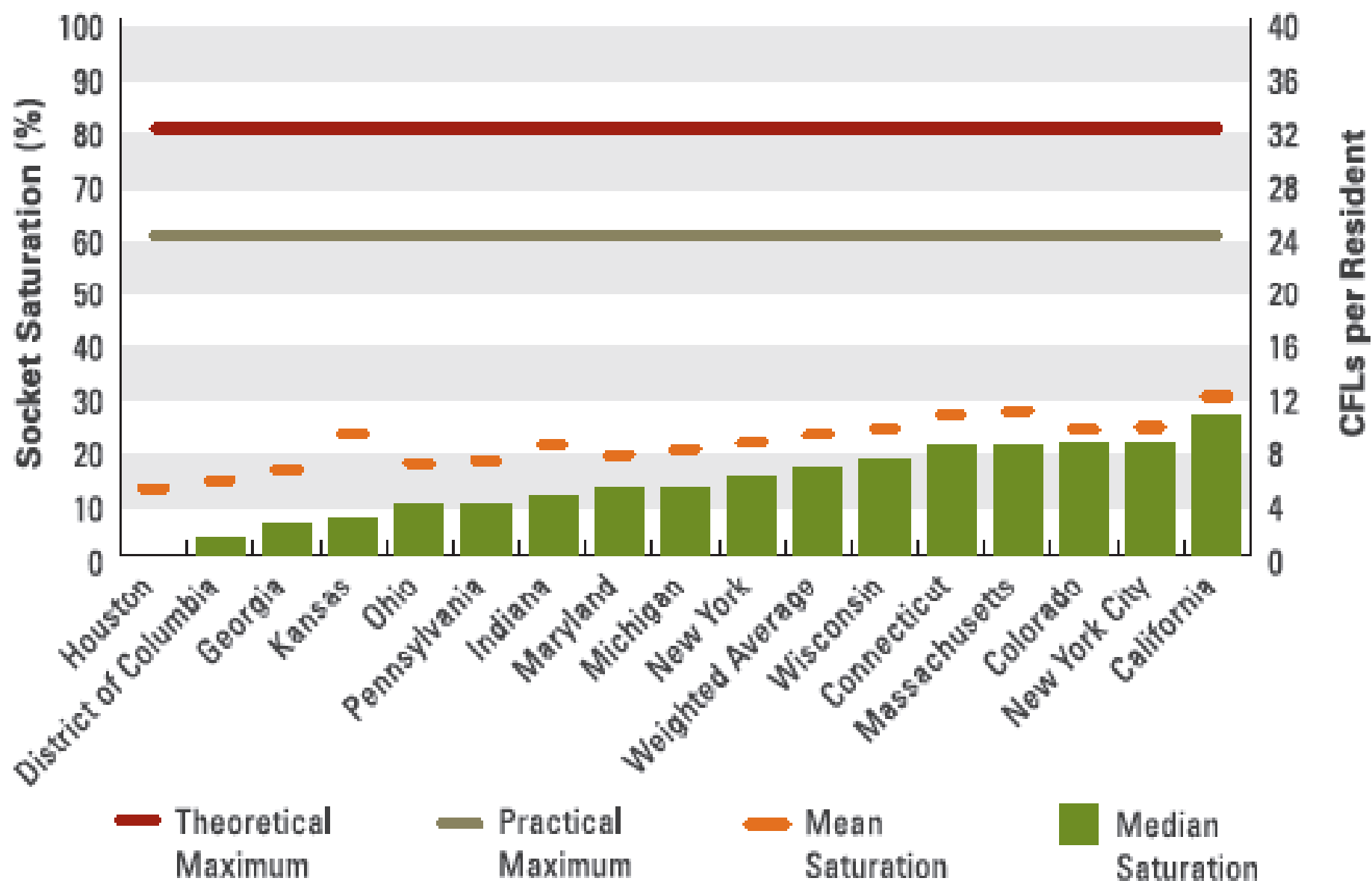
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Net-to-Gross is a challenge

Location	2008 Net-to-Gross		
	Recommended or Official	Low	High
Wisconsin	0.62	0.36	1.69
Massachusetts	0.41	0.19	0.74
Connecticut	0.81	0.22	0.91
New York	1.60	0.93	9.17
New York City	1.60	0.93	6.73
Vermont	1.09	1.06	1.57
California	0.65	0.23	0.65



Myth: The market is transformed.





Myth: CFL savings have been captured.

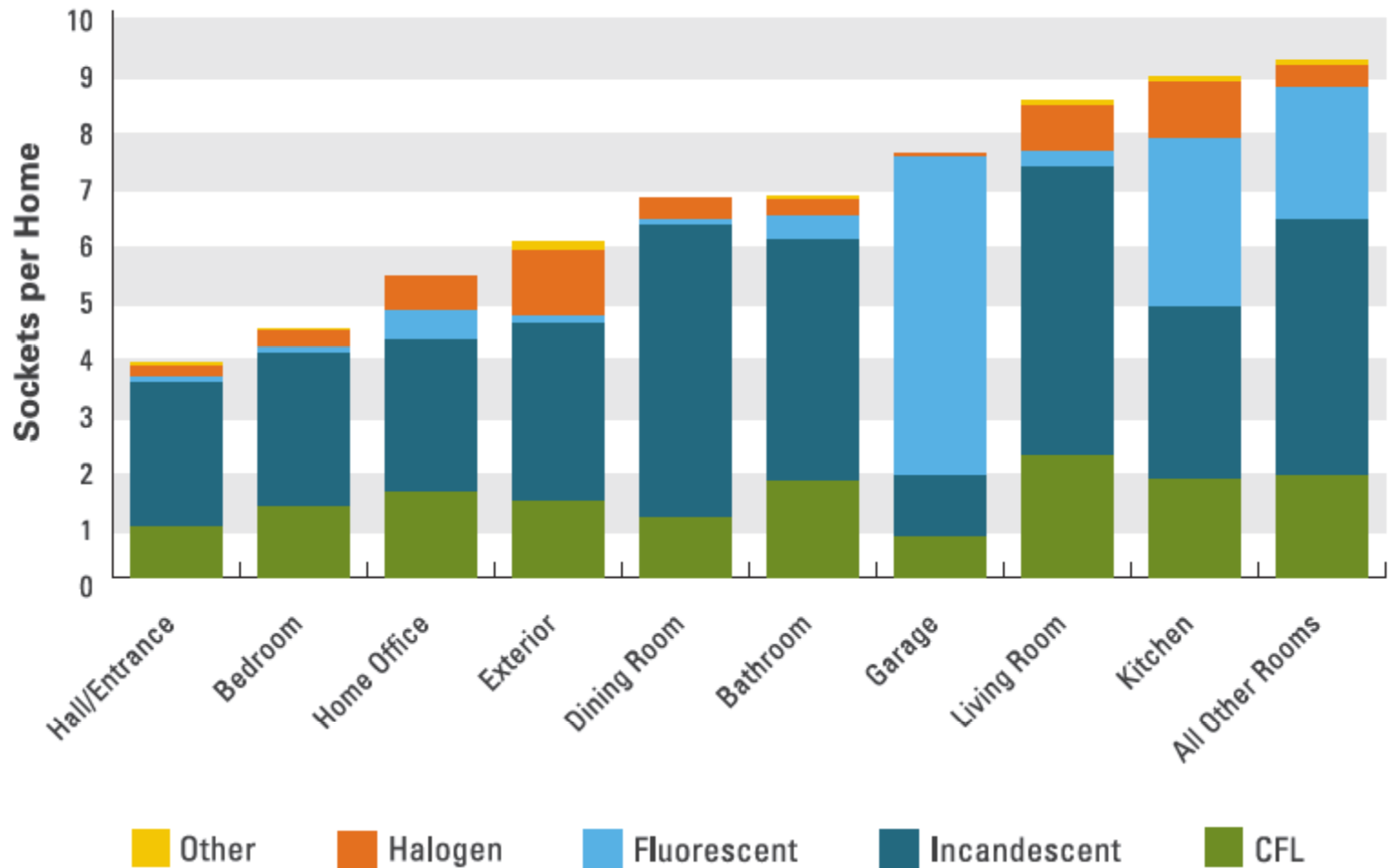
Socket, Shape, Control	Total Sockets	Number of Sockets With a CFL
Medium Screw, General Service (A/Globe), On/Off	18.2	6.4
Medium Screw, Specialty Size, On/Off	5.5	0.7
Medium Screw, All Sizes, Dimmable/3-Way	4.1	0.5
Small Screw, All Sizes, On/Off	3.3	0.1
Small Screw, All Sizes, Dimmable/3-Way	1.0	0.0
Pin-Base, All Sizes, All Controls	7.9	5.9*
All Sockets	40	8 (14 fluorescents)

*Three-quarters of pin-base sockets contain fluorescent lamps (CFL or other) and one-quarter contain halogen lamps.



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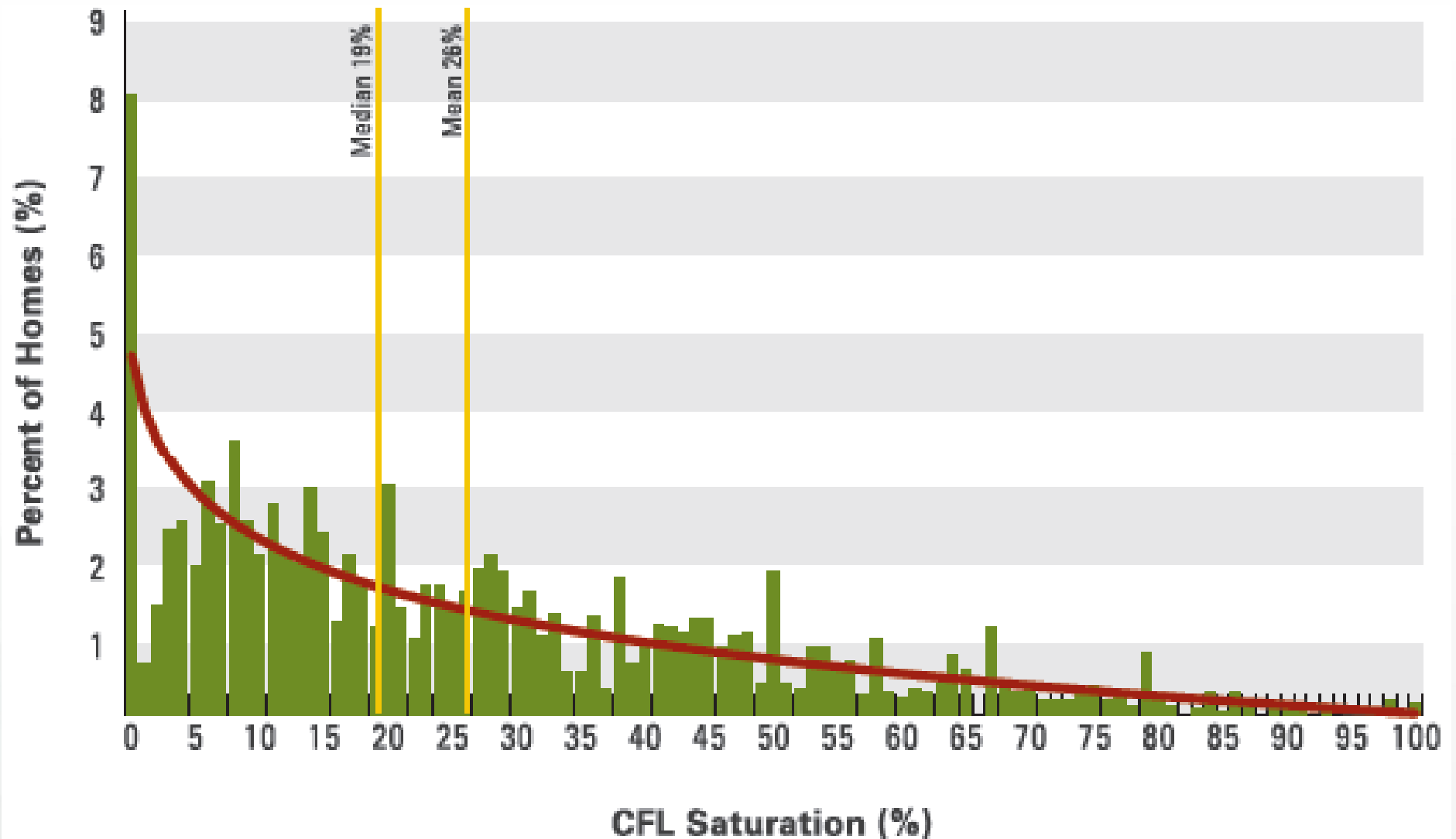
Myth: CFL savings have been captured.



Note: Values do not include empty sockets. "All other rooms" includes closets, laundry rooms, and others not encompassed by the other categories.



Do not be deceived by the Mean

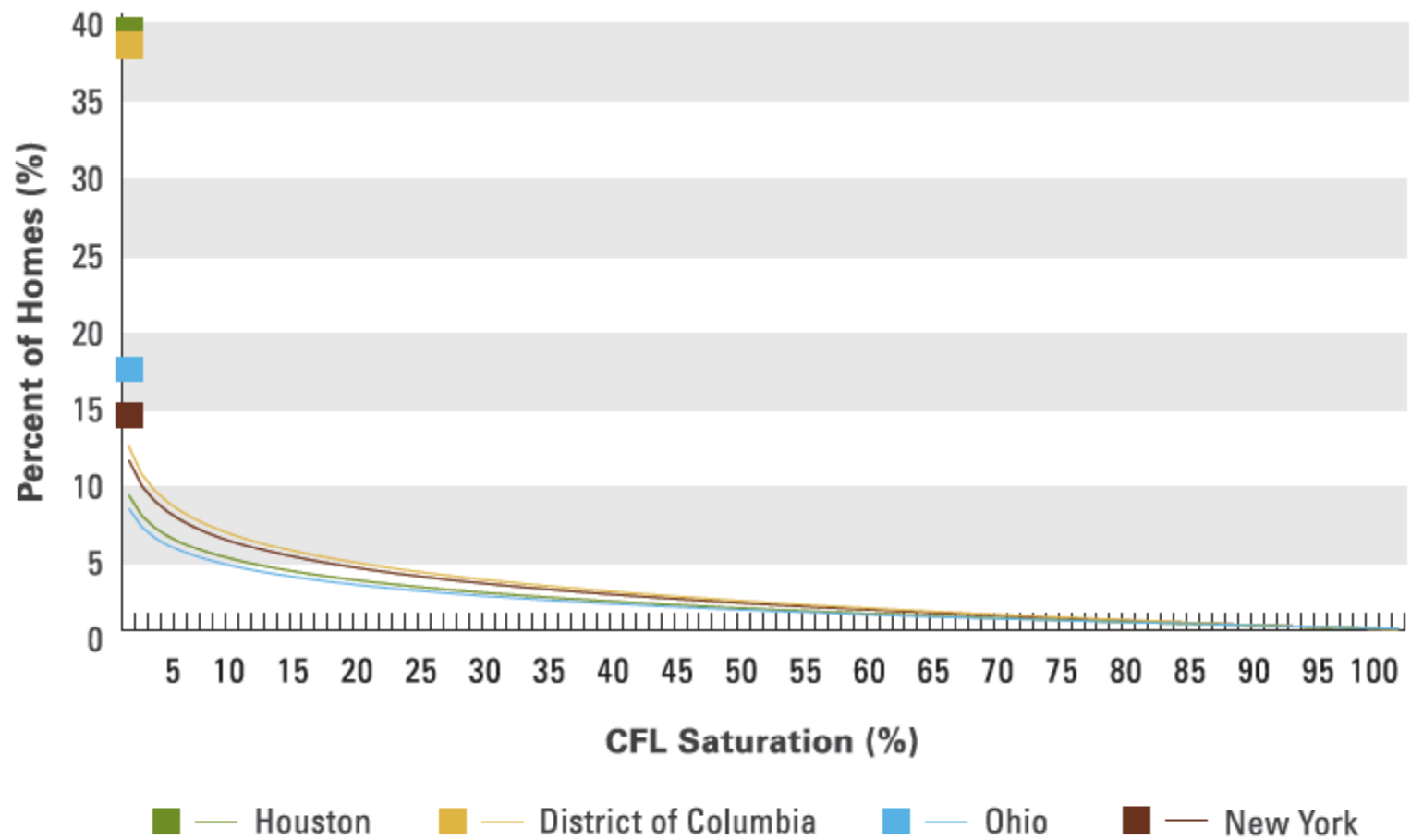




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Elsewhere the opportunity is even greater

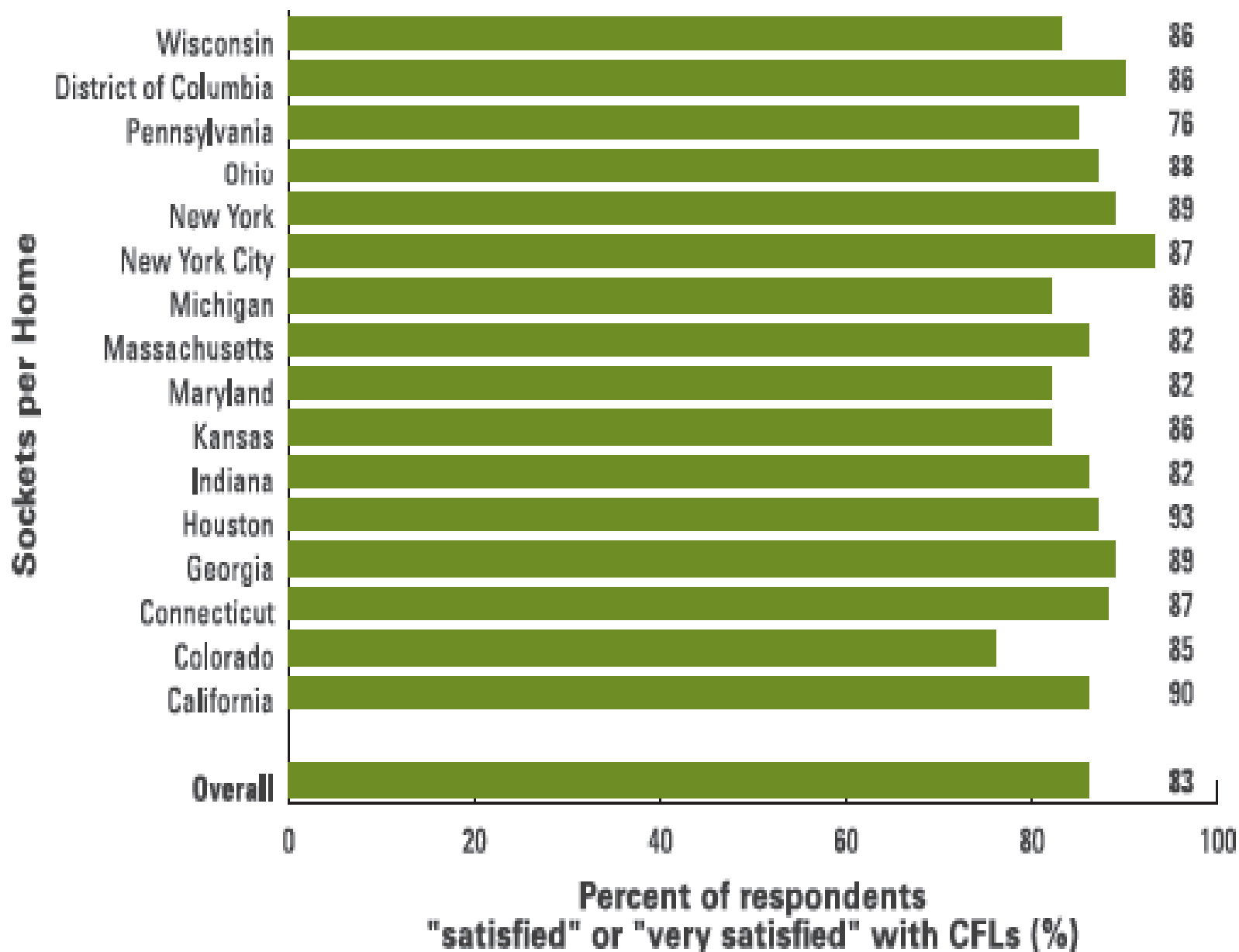
Figure 10 | Distribution of Household CFL Saturation, Regionally





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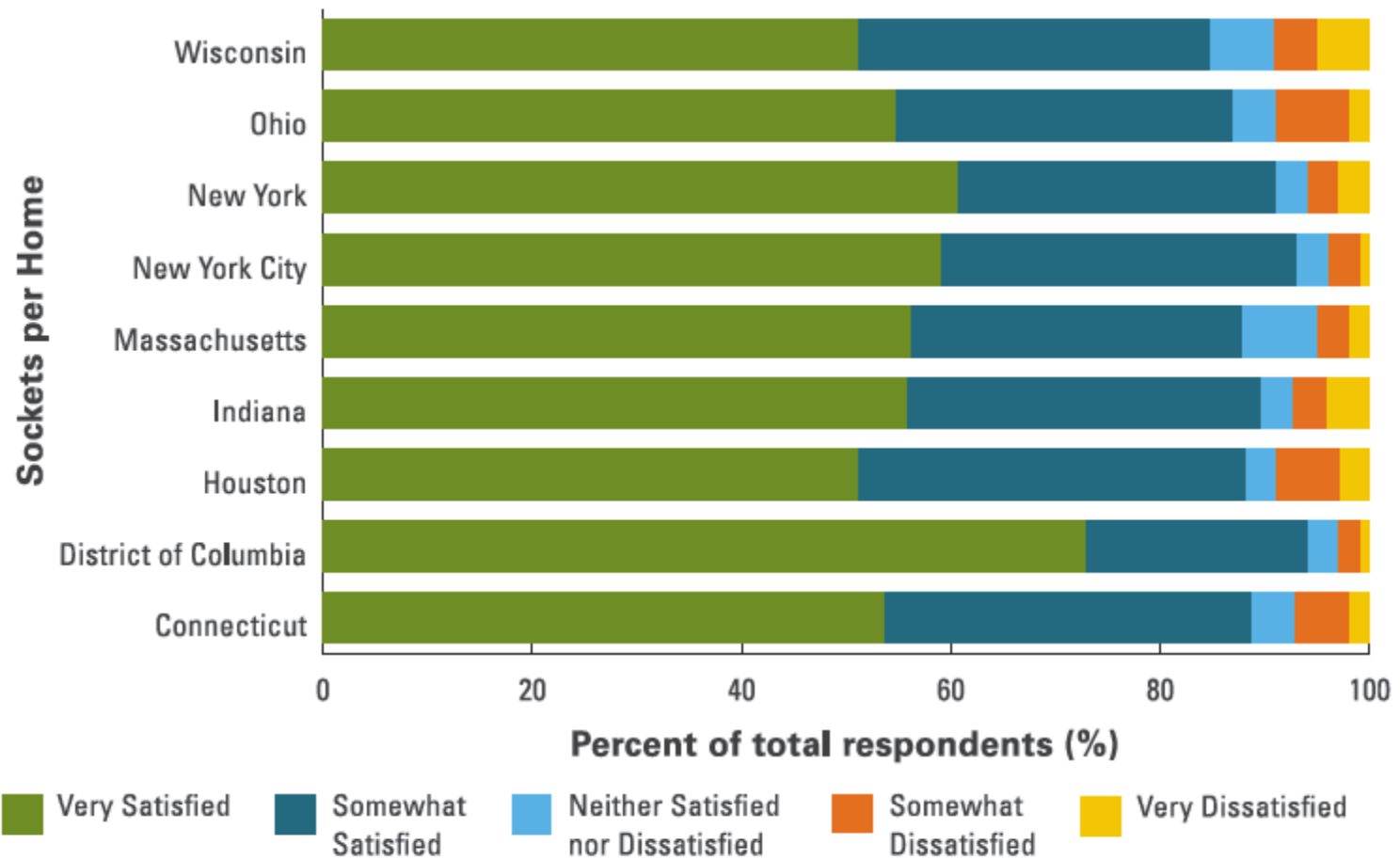
Myth: People don't like CFLs





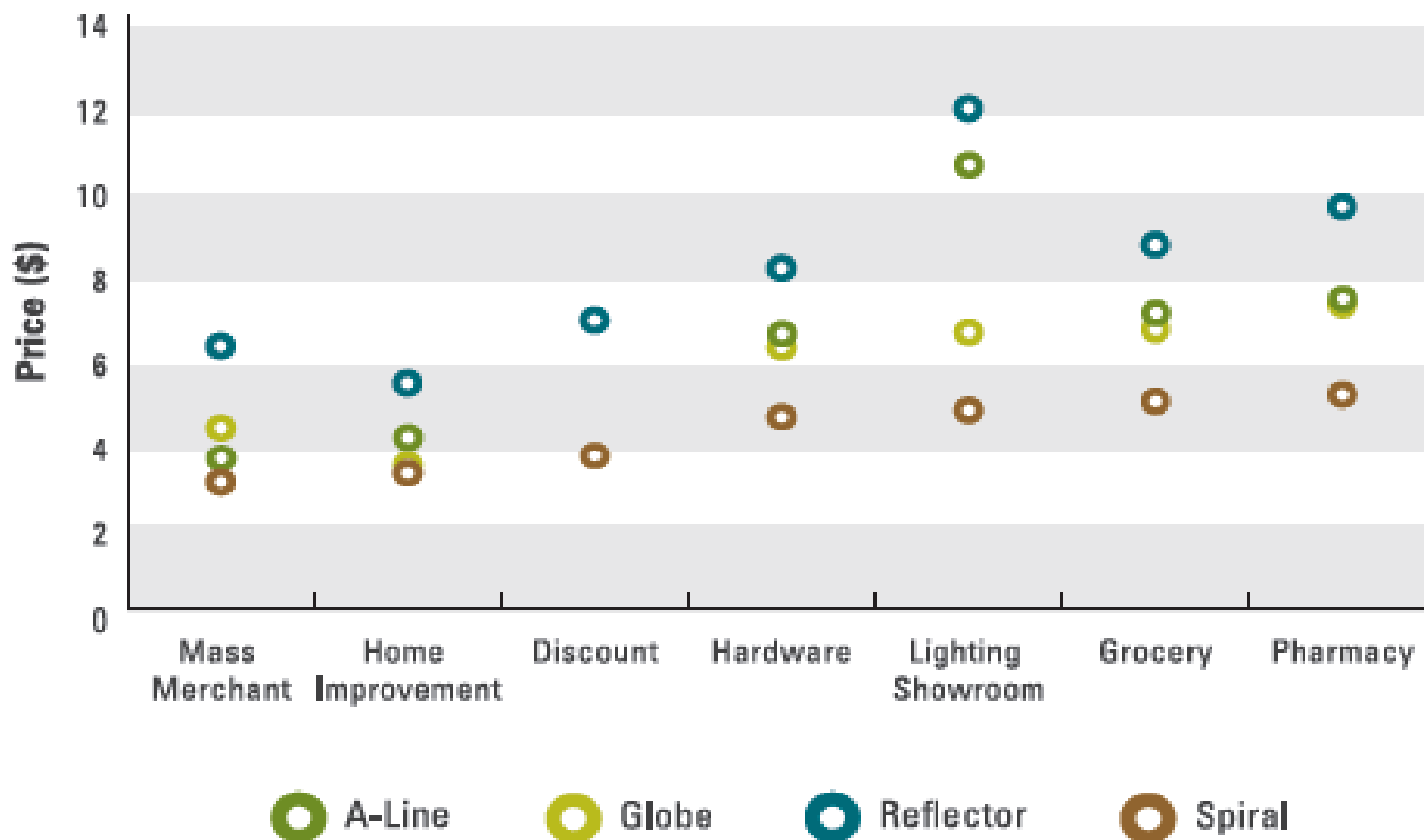
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Myth: People don't like CFLs





Prices vary based on retail outlet

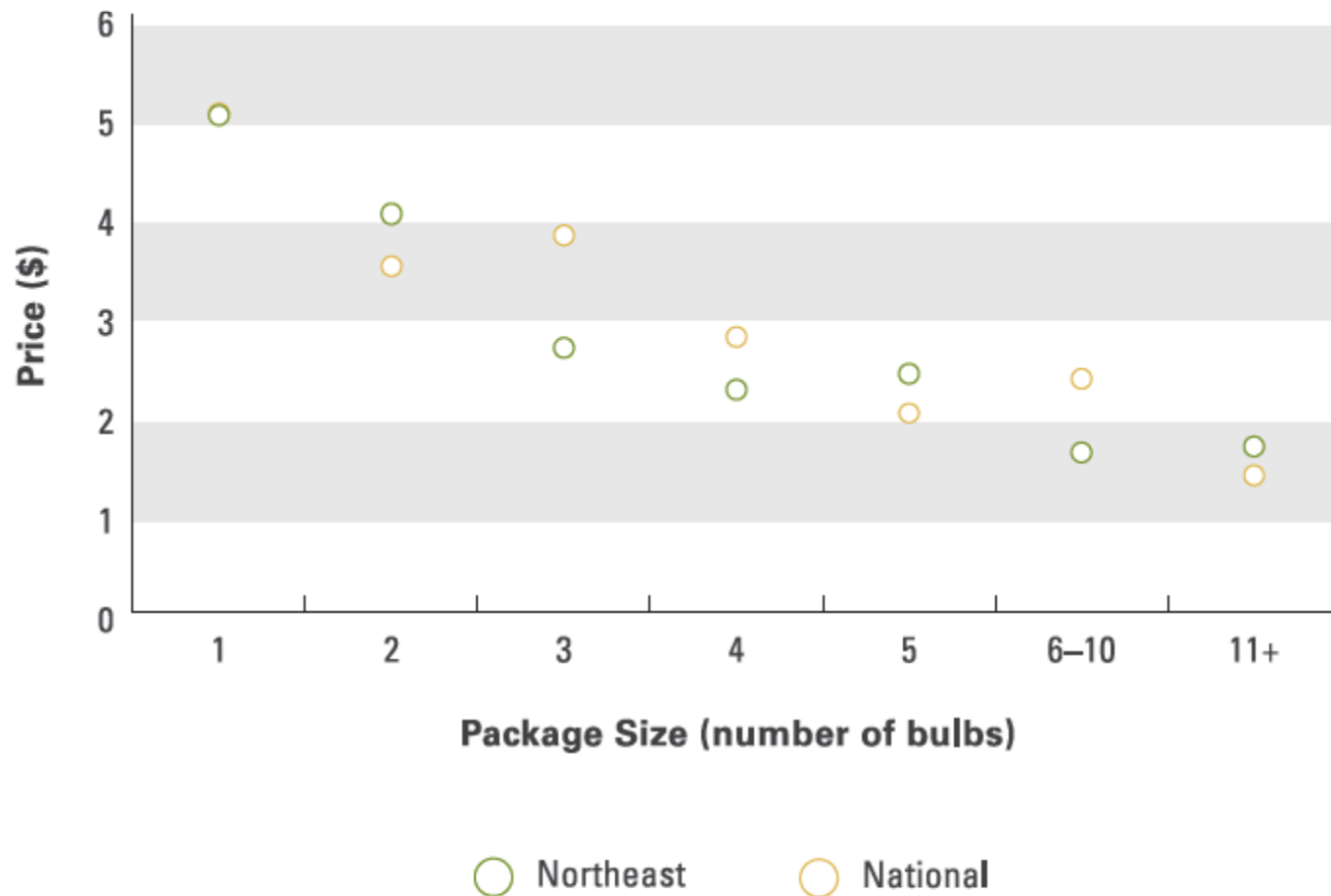




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Only inexpensive in multipacks


Figure 5 | Median Price Per Lamp: 10-Watt to 19-Watt Spiral CFLs





FTC labeling requirements

<u>Brightness</u>
820 lumens
<u>Estimated Energy Cost</u>
\$7.23 per year

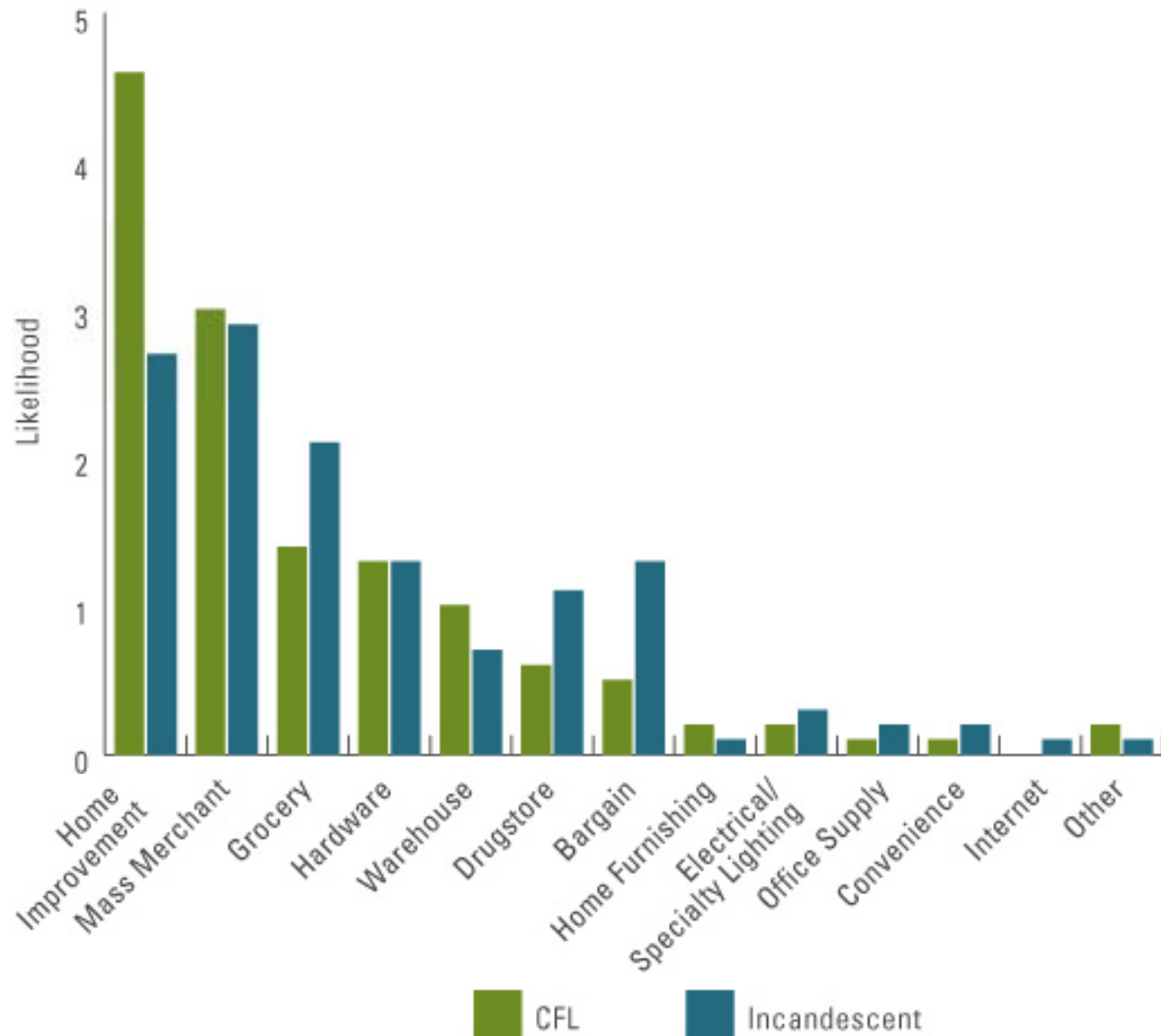
Lighting Facts Per Bulb	
Brightness	870 lumens
Estimated Yearly Energy Cost \$1.57 Based on 3 hrs/day, 11¢/kWh Cost depends on rates and use	
Life Based on 3 hrs/day	5.5 years
Light Appearance Warm  Cool 2700 K	
Energy Used	13 watts
Contains Mercury For more on clean up and safe disposal, visit epa.gov/cfl .	

- Announced June 2010; effective July 2011
- Applies to all medium screw-base bulbs



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Intriguing lack of symmetry

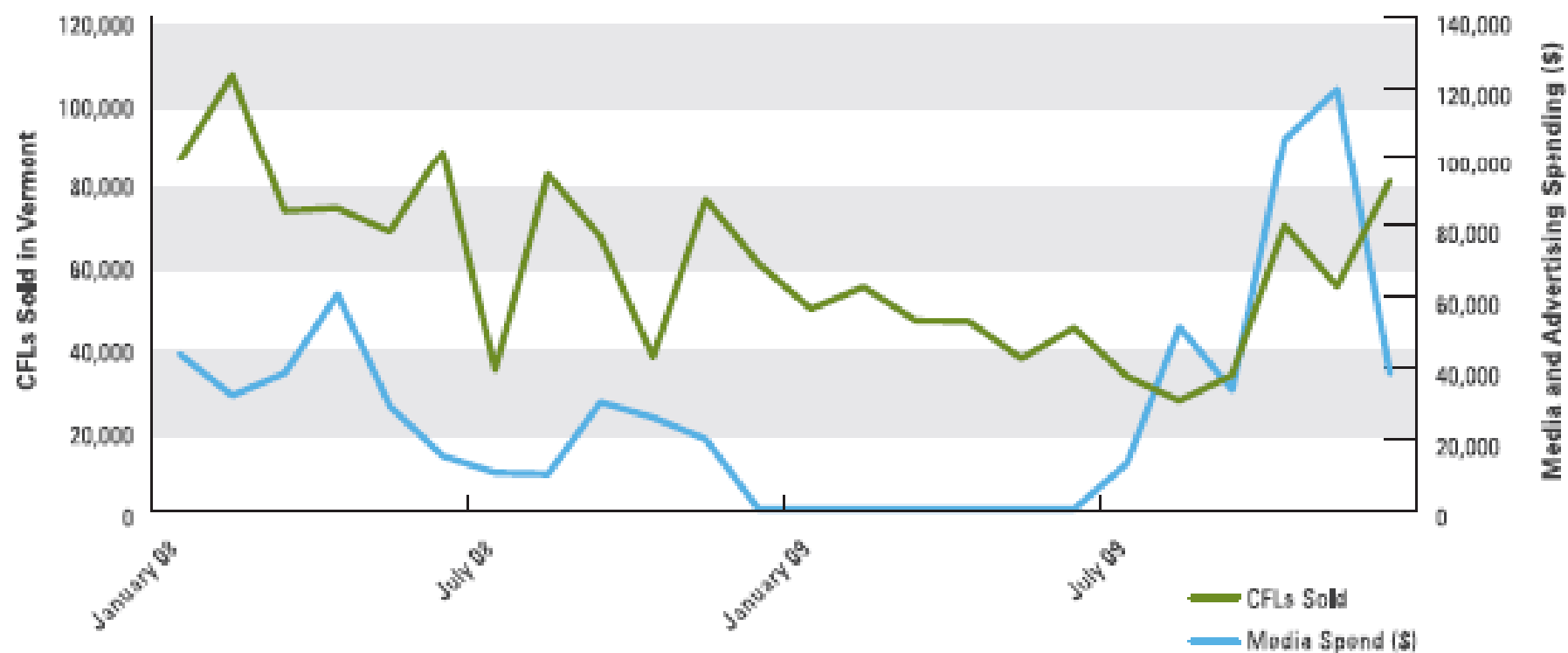


Note: Responses have been normalized, with a value of 1 representing the average number of responses each for CFLs and incandescent lamps.



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Suggestive data from Vermont





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Why aren't more CFLs installed?

Table 13 | Storage of Incandescent Lamps and CFLs in Relation to Household CFL Saturation

Number of CFLs Installed	Average Number of Incandescent Lamps Stored	Average Number of CFLs Stored
0	5.1	0.4
1-2	6.4	1.1
3-5	5.7	1.9
6-10	4.4	2.5
11-20	5.5	4.3
>20	7.5	9.4
Average Across Samples	5.6	3.2



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- Sales are dropping even though sponsor spending is rising
- People like CFLs and appear to put them wherever a bulb burns out
- Residential lamps, including CFLs, are used about 1.9 hrs/day
- No clear answers but suggestive data on why so many purchases are incandescents
- Need better data on sales and installations and likely new program models



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