



Regional Efficiency Program Market Status Updates

Monday, October 4, 11:00-12:30

**Moderator –
Eileen Eaton
Consortium for Energy Efficiency**



Learn more at energystar.gov



Agenda



- **Moderator Introduction**
- **Panelist Presentations**
 - Northeast
 - Southeast
 - Midwest
 - Southwest
 - Northwest
 - California
 - Canada
- **Q & A**

Please hold your questions until the end

Background on CEE

- ▼ CEE is a 501c(3) nonprofit organization
- ▼ 130+ members in 44 states and 8 provinces
- ▼ Governed by Board of Directors drawn from members
- ▼ Develop and sponsor 12 CEE initiatives for member use
- ▼ 16 working program committees
- ▼ Staff of over 25
- ▼ Approximately \$3 million budget
 - 75% from members
 - 25% from EPA and DOE

Who Are CEE Members?

- ▼ **Energy Efficiency Program Administrators**
 - utilities and non-utilities with mandated programs
- ▼ **Public Stakeholders** - DOE national labs, state and provincial energy offices, government energy research agencies, efficiency organizations (regional and national)

CEE's Lighting Work

- ▼ Residential and Commercial Lighting Committees
 - Develop consensus comments on ENERGY STAR® lighting specifications
 - Participate in FTC Lamp Labeling stakeholder process
 - Communicate consistently with industry, e.g. Position Paper on Solid State Lighting
 - Work with industry to support programs as they transition to comprehensive approaches
 - Organize the *Lighting for Tomorrow* design competition (in partnership with ALA and DOE)

Purpose of the Session

- ▶ Provide a detailed picture of the state of lighting market
 - Market penetration in different areas
- ▶ Give a high-level overview of lighting programs offered in the U.S. and Canada
 - Program design trends
 - Best practices in program design

Structure of Today's Session

- ▶ Since we can't hear directly from 130+ energy efficiency programs several organizations have offered to represent the programs in their area
- ▶ If you are interested in individual program efforts, please see:
 - 2010 CEE Residential Lighting Program Summary available at www.cee1.org
 - 2010 ENERGY STAR Summary of Lighting Programs available at www.energystar.gov

CEE Program Observations

- ▶ CEE has members that have been running lighting programs for 20+ years and those that are just starting
- ▶ Accordingly, their market penetration of ENERGY STAR lighting products in their service territories and their program design vary significantly



Today's Presenters

- United States
 - Northeast – Linda Malik, NEEP
 - Southeast – Ben Taube, SEEA
 - Midwest – Chad Bulman, MEEA
 - Southwest – Howard Geller, SWEEP
 - Northwest – Alexis Allan, NEEA
 - California – Richard Greenburg, SCE
- Canada
 - Isabelle Guimont, NRCCan



Linda Malik

**Northeast Energy Efficiency Partnership
(NEEP)**



Learn more at energystar.gov

Introduction



- **Organizational Mandate/Mission**
 - Accelerate the efficient use of energy in the Northeast and Mid-Atlantic Regions
- **Members**
 - Northeast and Mid-Atlantic Energy Efficiency Programs
- **Role of the organization in the region/with members**
 - To maximize energy efficient solutions through regional partnerships
- **Organizational activities to promote ENERGY STAR® Lighting**
 - NEEP coordinates EE program activities across the region to accelerate adoption of all ENERGY STAR product categories.





Overarching Regional Themes

- **Energy efficiency program trends in general**
 - Increasing EE focus colliding with economic and state budget crises
 - Other funding vehicles that complicate existing programs
 - Dwindling resources to apply to current program initiatives
 - Uncertainty about product availability
- **Lighting program trends**
 - “Policy/regulatory declaration of victory” threatens spiral CFL programs but bolsters specialty bulbs, SSL, hard-to-reach markets
- **Regulatory environment**
 - Rate impacts, net-to-gross ratios, and cost-effectiveness dominate agenda

State of the Regional Lighting Market



- **ENERGY STAR qualified lighting market penetration/uptake**
 - Region's behavior consistent with recent DOE (D&R) studies
 - Big box LED pilots
 - Traditionally a leader in socket saturation and market share
- **Future trends**
 - Market Lift programming
 - Increasing cost-effectiveness pressure
 - Increased emphasis on SSL, specialty bulbs and hard to reach segments
 - Motion toward comprehensive, design-based programming
- **Challenges**
 - Maintaining momentum in the face of policy/regulatory pressure, declining net savings and reliance upon pending EISA impacts
 - Continuing to educate industry on policy/regulatory "rules" that drive EE program administrator behavior



Regional Best Practices

- **Program models that work in your region**
 - Retail: Upstream and coupons
 - Events: energy fairs, home shows, employee events
 - New Construction: Direct install and incentives
 - Schools: Fundraising
 - Low income: Direct install, food banks
 - Home Performance: Direct install and incentives
- **New approaches to lighting technologies/hard-to-reach markets**
 - Big box LED launch
 - Primary partner becoming retailer/infrastructure
 - Hard to reach (MA efforts)
 - New retail partners (e.g. Family Dollar Stores)

Conclusion



- **Parting Words on the Future for ENERGY STAR Lighting in Northeast**
 - Imperative to create a lighting strategy for the region that recognizes transitions and cost-effectiveness challenges
 - Still a long way to go to achieve Market Transformation in EE lighting...but this reality is NOT always accepted and/or allowed (regulatory approvals) to be reflected in programs
 - Strategically approaching SSL in marketplace



Ben Taube

Southeast Energy Efficiency Alliance (SEEA)

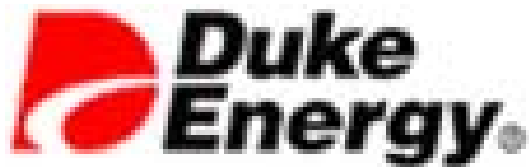


Learn more at energystar.gov

Introduction



Mission: The Southeast Energy Efficiency Alliance promotes energy efficiency for a cleaner environment, a more prosperous economy, and a higher quality of life in the Southeastern region of the US.



imagination at work





Overarching Regional Themes

- **Energy efficiency program trends in general**
 - Duke Energy
 - Georgia Power
 - BetterBuildings Program
- **Lighting program trends**
 - Utilities – CFL giveaway or discount retail programs; about ten utility CFL programs throughout the southeast
 - Specialty bulbs or LED incentives have gained interest with Progress Energy, SCANA in South Carolina and JEA in Florida.
 - JEA is offering a fixture incentives
 - SCANA (their new filing being accepted) intends to launch several lighting initiatives in the new year



Regulatory Environment

- **Program Cost Recovery**
 - Allowed through annual rider mechanism (almost all jurisdictions); recovered prospectively
- **Lost Revenue Recovery**
 - Annual lost revenue adjustment calculated separately (7 utilities in 4 jurisdictions); recovered prospectively based on deemed savings
- **Performance Incentives**
 - Annual rider mechanism
 - Shared savings percentage based on Utility Cost Test (5-15%) (approved: GA, KY, NC, SC; proposed: AR, FL, LA, MS)
- **Targets**
 - Utility specific targets for reductions in consumption (FPL, Progress, and Gulf in FL; Duke in NC and SC; Entergy in City of New Orleans)

State of the Regional Lighting Market



- **ENERGY STAR qualified lighting market penetration/uptake**
 - Latest analysis of ENERGY STAR appliance sales figures shows 20% market penetration in the Southeast versus 31% in the Northeast and 30% in New York and California.
 - General sense is that the best place for early gains from utility EE programs have come from lighting.
- **Future trends**
 - Focus is moving from working with customers to ENERGY STAR Lighting and Appliance Programs that work with retailers and distributors
 - CREE – LED – LED City/University
 - Greenlight New Orleans
 - Arkansas – Poultry Houses
- **Challenges**



- First costs

Regional Best Practices



- Programs in the Southeast
 - Duke: 4 approaches
 - Personalized Energy Report
 - Home Energy House Call
 - Residential Smart Saver
 - Non-Residential Prescriptive
 - Smart Saver

Conclusion



- **Parting Words on the Future for ENERGY STAR Lighting in the Southeast**
 - Southeast has historically low costs of energy so lighting programs are generally cost effective
 - State level tax credits have driven more lighting programs at a commercial building level
 - Creative program designs aid utilities in meeting regional and national targets.



Chad Bulman

Midwest Energy Efficiency Alliance (MEEA)



Learn more at energystar.gov

Introduction



- MEEA's Mission
- Membership Base
 - MEEA members cover a broad variety of sectors
 - 115 members strong
- Role of the organization in the region/with members
 - Policy efforts to advance EE, disseminate key info and create networking opportunities, implement and administrate EE programs, encourage collaboration and coordination of EE efforts across the region
- MEEA's approach to ENERGY STAR® Lighting





Overarching Regional Themes

- Energy efficiency program trends in general
 - Energy Efficiency Resource Standards becoming the standard in Midwest
 - EE funding in the region: sustained, strong growth
- Lighting program trends
 - Lighting still our bread and butter
 - Also a realization it can't be the only tool in our belt
- Regulatory environment
 - Many lighting programs pass cost-effectiveness requirements with ease
 - Recent legislation has made lighting essential to upstart EE efforts for many Midwestern utilities

State of the Regional Lighting Market

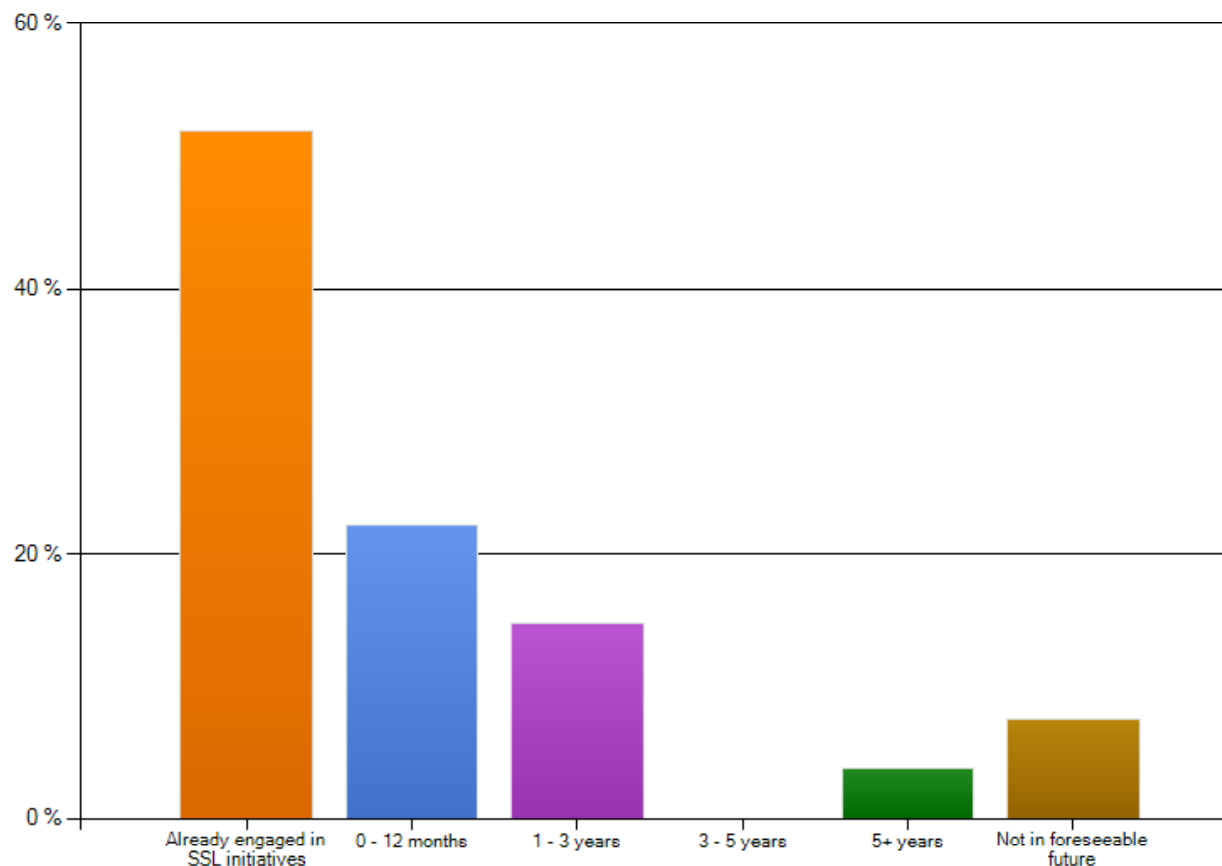


- **ENERGY STAR qualified lighting market penetration**
 - Stagnant lighting market
 - Interesting SSL and CFL trends...
 - ENERGY STAR still the 'face' of energy efficiency for consumers
- **Future trends**
 - Incentives opportunities are shifting (sticks replacing carrots)
 - Continuing unmet needs for consumers in lighting – market will diversify
 - Smarter consumers
- **Challenges**
 - EISA
 - CFL adoption still an uphill battle
 - Overall weakness in lighting industry
 - SSL not yet prepared to take a strong role

State of the Regional Lighting Market



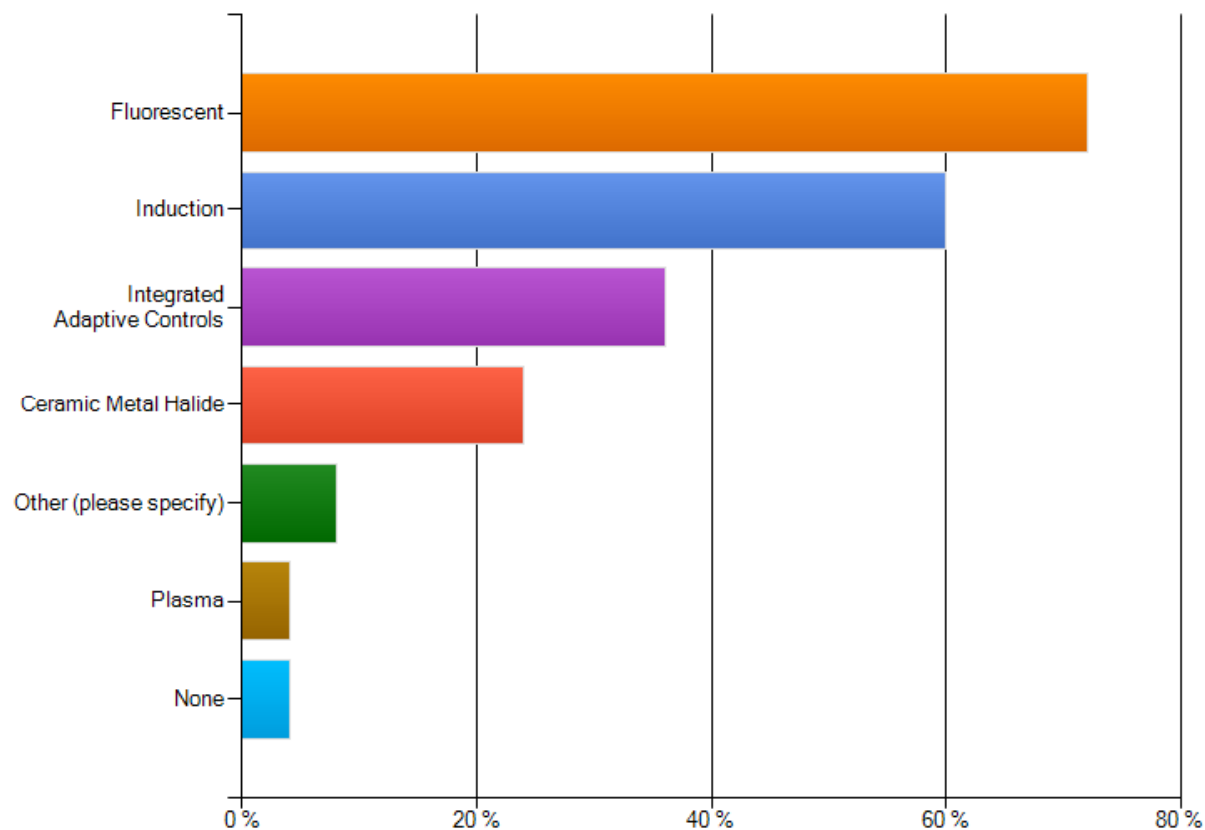
In what timeframe do you expect to launch SSL initiatives within your organization?



State of the Regional Lighting Market



What other efficient lighting technologies are under consideration for your upcoming lighting initiatives?



Regional Best Practices



- Program models that work in your region
 - Incentives coupled with education
 - Sustained messaging
 - Youth-based programs will make your jobs easier
- Approaches being taken to new lighting technologies and/or hard-to-reach markets
 - SSL: Move forward with knowledge and caution
 - Integrating lighting into other program efforts; holistic approach to EE
 - Incandescents are not worth keeping
 - CFL recycling/mercury messaging: a vacuum

Conclusion



- Parting Words on the Future for ENERGY STAR Lighting in the Midwest...





Howard Geller

Southwest Energy Efficiency Project (SWEEP)



Learn more at energystar.gov

Introduction



- SWEEP is a public interest organization promoting greater energy efficiency in AZ, CO, NM, NV, UT and WY
- Founded in 2001, based in Boulder, CO
- SWEEP advances energy efficiency through work on state legislation, regulations, utility DSM programs, building codes, collaboration with the private sector, education and training, and information development and sharing
- See www.swenergy.org for more details

Utility DSM Expenditures in the Southwest



State	Electric DSM Program Spending/Budgets (million \$ per year)					
	2002	2004	2006	2008	2009	2010 (est.)
AZ	4	4	19	40	50	75
CO	11	21	18	28	54	81
NV	3	11	30	55	60	65
NM	1	1	1	10	16	25
UT	9	16	27	36	60	56
WY	~0	~0	~0	1	2	4
Region	29	54	95	170	243	306

ENERGY STAR Lighting Program Summary



- Residential lighting (CFLs) is a major portion of utility DSM savings in the region
- All major utilities provide in-store discounts
- 2009 Program Results:
 - APS – 50% of all kWh savings from CFLs
 - Nevada Power Co. – 48% of all savings from CFLs
 - PacifiCorp (UT) – 32% of all savings from CFLs
 - Xcel Energy (CO) – 27% of all savings from CFLs
- Strong CFL programs continuing in 2010
- A few utilities also promote ENERGY STAR light fixtures, but very limited sales so far

Residential Lighting Program Results



Utility	CFLs Disseminated 2007-2009	2010 CFL Goal	CFLs per Household 2007-2010
NV Energy	8,949,100	2,962,100	11.6
Arizona Public Service	7,710,000	3,100,000	10.9
PacifiCorp Utah	4,043,800	1,744,300	8.4
Public Service of NM	1,946,400	900,000	6.5
Xcel Energy Colorado	2,205,100	1,214,400	2.9



Future Trends and Issues

- What will utilities do when EISA lamp standards take effect? Drop basic CFLs, or not?
- Utilities will focus more on specialty and next generation CFLs
- Programs likely to continue in-store discounts and include some direct install (e.g., low income HHs)
- Programs will promote LEDs in the residential marketplace in 2012 and beyond assuming cost and performance continue to improve



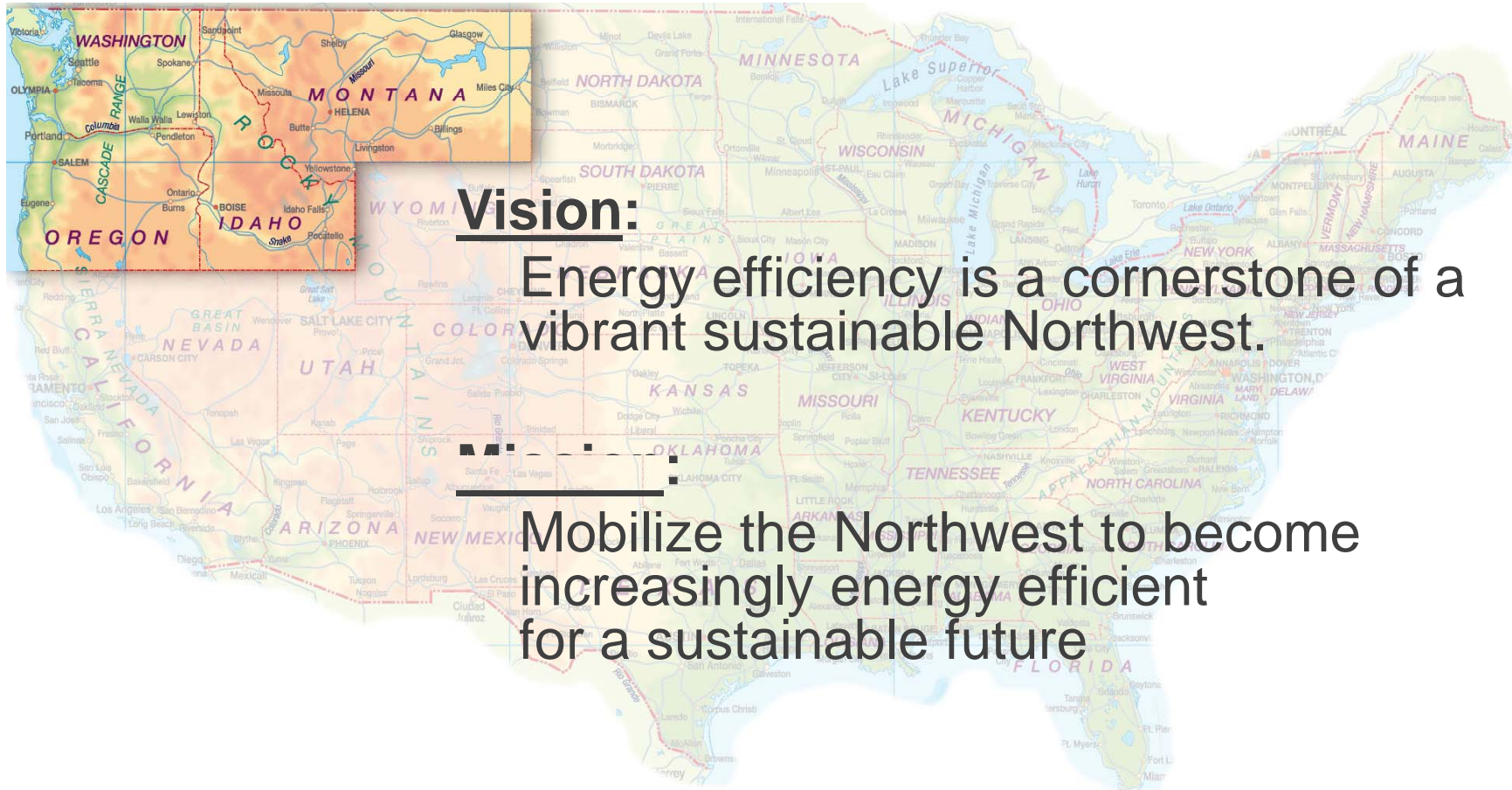
Alexis Allan

Northwest Energy Efficiency Alliance (NEEA)



Learn more at energystar.gov

Northwest Energy Efficiency Alliance





Introduction

- Members
 - 130+ Electric utilities, Bonneville Power Administration and Energy Trust of Oregon
- NEEA activities to promote ENERGY STAR® Lighting
 - Beginning in the mid 1990s, NEEA has worked with the region to increase CFL sales by overcoming market barriers including: product quality, price and availability. The benefits of these efforts can be seen today.
 - Once NW market share reached 25% in 2008, NEEA transitioned lighting programs to NW utilities to be included in their resource acquisition programs.
 - NEEA continues to track and monitor ENERGY STAR lighting trends in the region.



Overarching Regional Themes

- Energy efficiency program trends in general
 - Most utilities are increasing spending on efficiency programs for several reasons including:
 - Adaptation of the 6th power plan (Bonneville Power Administration's power planning guide)
 - Legislative requirements like I-937 (Washington State)
 - Some utilities are seeing pressure on efficiency funding because of lower utility revenue due to economic conditions
- Lighting program trends
 - Increased emphasis on specialty CFLs
 - Direct install and direct mail programs are becoming more prevalent
 - New home builders are increasing their use of ENERGY STAR fixtures
 - Fixture market has been effected by building downturn
- Regulatory environment
 - Generally the Northwest has a very supportive regulatory environment.

State of the Regional Lighting Market



- Compact Fluorescent Lights: Northwest Facts*
 - 18,200,000 CFLs sold in the Northwest in 2009 of that 4,800,000 were incentivized by utility programs
 - 29% market share for CFLs in the Northwest
 - 20% of the market was from DIY, 33% from mass merchants and 33% from wholesale clubs
 - 96% of customers are aware of CFLs up from 86% in 2006
 - 30% of all customers became aware of CFLs in the last 6 years
- Future trends
 - LED bulbs are available on the shelf although pricing remains a significant hurdle
- Challenges
 - Utilities are focused on what happens when regulation changes

Regional Best Practices



- Program models that work in your region
 - Up stream incentive based programs have been working well in the Northwest. Programs like Simple Steps, Smart Savings work upstream with retail manufactures and distributors to rebate both CFLs, ENERGY STAR fixtures and energy-saving showerheads
 - Utilities also offer advanced lighting package rebates directly to Builders
- Approaches being taken to new lighting technologies and/or hard-to-reach markets
 - Direct mail and direct install programs are becoming a larger part of how utilities reach customers
 - Utilities are interested and looking into new technologies as they become available
 - Technologies should not dilute energy efficiency message and seek to achieve maximum savings
 - Innovative models that build on market based trends are being considered such as the “lift” model

Conclusion



- **Parting Words on the Future for ENERGY STAR Lighting in the Northwest**
 - The Northwest continues to find unique ways to increase ENERGY STAR lighting penetration through retail programs, direct install and direct mail campaigns
 - We continue to be a leader in helping to bring new energy saving technologies to the marketplace
 - Utilities are looking to meet increased goals through a variety of program offerings



Richard Greenburg

Southern California Edison
(SCE)

California's Statewide Lighting Program



Learn more at energystar.gov

Introduction



- Organizational Mandate/Mission – Achieve PUC-approved targets and performance metrics for energy savings and demand through efficient residential lighting (IOUs: SCE, PG&E and SDG&E).
- Members (Participants)

IOU	Participating Manufacturers	Participating Retailers	Retail Locations
PG&E	17	740	2,100
SCE	24	743	3,345
SDG&E	15	100	426

- Role of the organization in the region/with members
 - The 3 IOUs, SMUD, and municipal utilities share the role of administering energy efficiency programs to California.
- Organizational activities to promote ENERGY STAR® Lighting
 - All products for which ENERGY STAR specifications are applicable must be ENERGY STAR qualified and labeled to participate.
 - ENERGY STAR Logo appears on all display signage.



Overarching Regional Themes

- Energy efficiency program trends in general
 - With funding increasing overall, but decreasing for bare spirals, target achievement is becoming more challenging than ever for all lighting programs.
- Lighting program trends
 - Phase down of incentives for bare spiral CFLs up to 29 Watts from 2010 to 2012. It is quite possible none will be offered after that. After 2012 incentives for other products might not be adequate to sustain the traditionally high budgets and results.
- Regulatory environment
 - Pressure is being applied at several levels that could result in program under performance. IOUs are struggling under interactive therm effects and reduced per-unit savings assumptions. Cost-effectiveness requirements rule out expansion into LEDs until price comes down considerably.

State of the Regional Lighting Market



- ENERGY STAR qualified lighting market penetration/uptake

- Marked Increase in specialty CFL market penetration as evidenced in increase of quantities to all retail channels through our programs (coming slide will illustrate).
- LEDs are waiting in the wings, and may do so for another few years for residential. It is expected that nonresidential market entrance with significant incentives will come before residential.

- Future trends

- California will implement EISA general service light bulb standards one year earlier than Federal statutes.
- SCE Pilot Program with Cree and Home Depot this month will help us understand marketability of LED screw-in reflectors better.
- SDG&E: Planned pilot for 2010-11 of LEDs Reflectors. Pilot pending ENERGY STAR approval of LED product.
- Focus will shift more to socket saturation from market saturation

- Challenges

- Don't get me started!
- Therms: Interactive effects of CFLs make it difficult to achieve program goals because of negative therm impacts to portfolio (SDG&E and PG&E)



Regional Best Practices

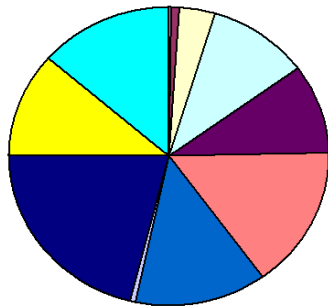
- Program models that work in your region
 - The fact that EE departments are highly dependent on lighting programs for portfolio achievement requires models that maximize results and minimize cost, usually through upstream buy-down methods aimed at highly cost-effective products.
- Approaches being taken to new lighting technologies and/or hard-to-reach markets
 - Wait until new lighting technologies are cost-effective and market-viable.
 - Approach new technologies through pilot programs.
 - We have turned most of our previous hard-to-reach markets into easy-to-reach markets. The next frontier might be internet sales promoted by non-internet outreaches to remote communities. High income is the hardest of all to reach. That is where we will first target possible premium specialty products (approaching Super Lamp) or Residential LEDs.

2010 Lighting Allocations



SCE: 6.5 M Specialty bulbs \$12.9 M

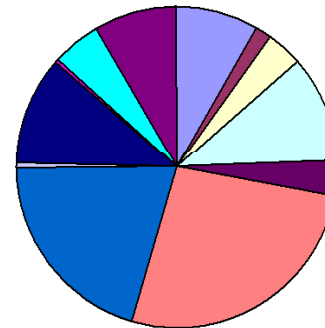
Specialty



- Drug
- Electronics
- Hardware
- HomeImprovement
- LargeChainDiscount
- LargeChainGrocery
- LargeMassMerchandise
- Lighting
- MembershipClub
- Other
- SmallDiscount
- SmallGrocery

SCE: 13.8M Bare Spiral bulbs \$16.7 M

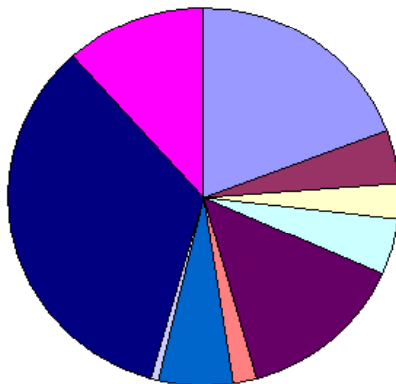
Bare Spiral



- Drug
- Electronics
- Hardware
- HomeImprovement
- LargeChainDiscount
- LargeChainGrocery
- LargeMassMerchandise
- Lighting
- MembershipClub
- Other
- Small Discount
- SmallDiscount
- SmallGrocery

PG&E: 4.2M Specialty bulbs \$9.1M

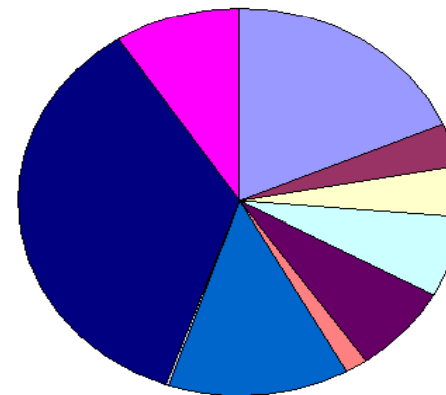
Specialty



- Discount General Merchandise
- Drug
- Large Home Improvement
- Large Mass Merchandise
- Large Supermarket
- Lighting & Electronics
- Membership Club
- Other
- Small/Medium Grocery Stores

PG&E: 8.5 M Bare Spiral bulbs \$12.9 M

Bare Spirals



- Discount General Merchandise
- Drug
- Large Home Improvement
- Large Mass Merchandise
- Large Supermarket
- Lighting & Electronics
- Membership Club
- Other
- Small/Medium Grocery Stores
- Small/Medium Hardware



SCE 2010 Data: Specialty Products

SCE 2010 Allocations

Specialty Products

Retail Channel	Quantity	Percent	Dollars	Gross kWh	Gross kW
Drug	13,300	0.2%	41,225	718,806	129
Electronics	62,312	1.0%	188,431	2,731,622	642
Hardware	236,684	3.6%	315,536	8,563,017	737
HomeImprovement	670,147	10.3%	805,395	22,991,291	2,876
LargeChainDiscount	639,040	9.8%	789,264	21,177,044	2,237
LargeChainGrocery	989,753	15.2%	1,654,828	36,310,728	5,071
LargeMassMerchandise	876,947	13.4%	1,101,319	35,274,552	4,235
Lighting	32,504	0.5%	121,798	1,870,260	323
MembershipClub	1,368,126	21.0%	3,363,596	71,464,157	9,899
Other	1,500	0.0%	4,875	86,213	15
SmallDiscount	742,122	11.4%	2,005,110	35,521,289	6,147
SmallGrocery	897,781	13.7%	2,506,892	43,178,698	7,631
Grand Total	6,530,215		12,898,268	279,887,677	39,942



SCE 2010 Data: Bare Spiral CFLs

SCE 2010 Allocations

Bare Spiral CFLs

Retail Channel	Quantity	Percent	Dollars	Gross kWh	Gross kW
Drug	1,139,005	8.3%	1,839,318	60,409,124	10,819
Electronics	225,335	1.6%	381,081	12,876,321	2,306
Hardware	509,513	3.7%	901,770	28,698,425	5,133
HomeImprovement	1,475,914	10.7%	911,707	66,553,390	11,926
LargeChainDiscount	530,980	3.9%	925,545	30,444,129	5,445
LargeChainGrocery	3,598,388	26.1%	5,429,247	199,984,455	35,771
LargeMassMerchandise	2,822,839	20.5%	2,218,759	142,019,336	25,430
Lighting	62,103	0.5%	115,813	3,506,484	627
MembershipClub	1,540,006	11.2%	822,994	68,677,062	12,286
Other	26,707	0.2%	50,743	1,534,988	275
Small Discount	9,000	0.1%	15,600	498,774	89
SmallDiscount	674,258	4.9%	1,176,584	38,486,629	6,884
SmallGrocery	1,153,394	8.4%	1,982,370	65,983,088	11,802
Grand Total	13,767,442		16,771,532	719,672,205	128,792

PG&E 2010 Data: Specialty Products



PG&E 2010 Allocations

Specialty

Retail Channel	Quantity	% QTY	\$	KWh	KW	Thm
Discount General Merchandise	822,646	19%	1,918,550	12,132.09	1.78	(258.81)
Drug	191,184	5%	456,869	1,324.02	0.19	(28.25)
Large Home Improvement	126,544	3%	108,071	984.72	0.14	(21.00)
Large Mass Merchandise	205,975	5%	299,476	1,244.97	0.12	(16.36)
Large Supermarket	588,544	14%	1,498,419	1,495.23	0.22	(31.92)
Lighting & Electronics	82,048	2%	184,656	351.56	0.05	(7.51)
Membership Club	264,196	6%	666,182	1,525.27	0.21	(30.00)
Other	20,286	0%	46,945	2,889.09	0.42	(61.66)
Small/Medium Grocery Stores	1,443,173	34%	3,167,600	51,104.22	7.49	(1,090.15)
Small/Medium Hardware	499,410	12%	779,216	15,267.95	2.17	(315.64)
Grand Total	4,244,006		9,125,983	88,319	13	(1,861)



PG&E 2010 Data: Bare Spiral CFLs

PG&E 2010 Allocations

Bare Spirals

Retail Channel	Quantity	% QTY	\$	KWh	KW	Thm
Discount General Merchandise	1,577,015	18%	2,773,234	25,184.71	3.67	(537.08)
Drug	316,348	4%	582,853	3,389.12	0.49	(72.26)
Large Home Improvement	352,302	4%	265,003	1,272.26	0.19	(27.14)
Large Mass Merchandise	581,209	7%	432,578	521.88	0.08	(11.13)
Large Supermarket	607,244	7%	956,282	2,534.85	0.37	(54.06)
Lighting & Electronics	134,592	2%	236,579	616.08	0.09	(13.14)
Membership Club	1,132,344	13%	1,128,398	354.70	0.05	(7.56)
Other	23,471	0%	35,573	1,625.00	0.24	(34.66)
Small/Medium Grocery Stores	3,018,275	35%	5,177,771	109,877.71	16.02	(2,343.23)
Small/Medium Hardware	791,248	9%	1,335,758	21,258.49	3.10	(453.33)
Grand Total	8,534,048		12,924,029	166,635	24	(3,554)



Isabelle Guimont

Natural Resources Canada (NRCAN)



Learn more at energystar.gov



Introduction

- Transforming the Equipment Market
- NRCan is the co-chair of two committees:
 - CLIC (Canadian Lighting Industry Collaborative)
 - SLIC (Strategic Lighting Initiative Committee)
- Role of the organization in the region/with members
 - Implement regulations, spearhead activities such as studies, databases, programs, etc, to help transform the market
- Promoting ENERGY STAR® Lighting
 - Fall 2010 Campaign focusing on fixtures
 - Ongoing: NRCan/ENERGY STAR provides lists of qualified models that are used by utilities and other Participants when they are delivering programs promoting qualified products.



Overarching National Themes

- Energy efficiency program trends in general
 - SSL is a major focus of future programming
 - Several pilots related to outdoor and commercial lighting
 - More and more activities involving fixtures across the country
- Lighting program trends
 - Major regulations are coming into effect in 2012:
 - Phase-out of inefficient lamp
 - Lamp labeling
- Favorable regulatory climate
 - Increase MEPS of existing products
 - Introduction of new products

State of the National Lighting Market



- ENERGY STAR qualified lighting market penetration/uptake
 - 75% of Canadians homes use CFLs
 - No data on LED penetration
 - Traditional fixtures still dominate the market
 - DLS are widely used in Canada
 - ENERGY STAR awareness in 2010 has reached 89% online
- Future trends
 - Keep on promoting qualified fixtures, increase penetration of LED products, target outdoor lighting as well as lighting in new home construction.
- Challenges
 - Manage a smooth transition for the phase-out of inefficient lamps.
 - Educate the public on LED – Not all LED are made equal.

National Best Practices



- Program models that work in your region
 - *Switch and Save* Campaign
 - Provincial programs led by utilities
 - Trade-ins programs keep on being popular, especially with decorative light strings
- Approaches being taken to new lighting technologies and/or hard-to-reach markets
 - Mainly pilots throughout the country

Conclusion



- **Parting Words on the Future for ENERGY STAR Lighting in Canada...**
 - Look for the Outdoor Lighting Summit in early 2011
 - Wish to increase selection of qualified fixtures (fluorescent and LED) available to Canadians
 - We are keen on following LED/SSL innovations



Thank You!



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