



# MOMENTUM SAVINGS

Monthly Call  
October 5, 2016



# AGENDA

- Update on baseline library - Bonnie
- Residential Lighting Model - Jessica
- Non-Residential Lighting - Jessica
- Conduit-Ed & Momentum Savings - Ethan



UPDATE

BASELINE

LIBRARY



# RESIDENTIAL LIGHTING STUDY UPDATE



RTF Market Analysis Subcommittee has  
provided comments

Comments are being reviewed and will  
integrated where appropriate

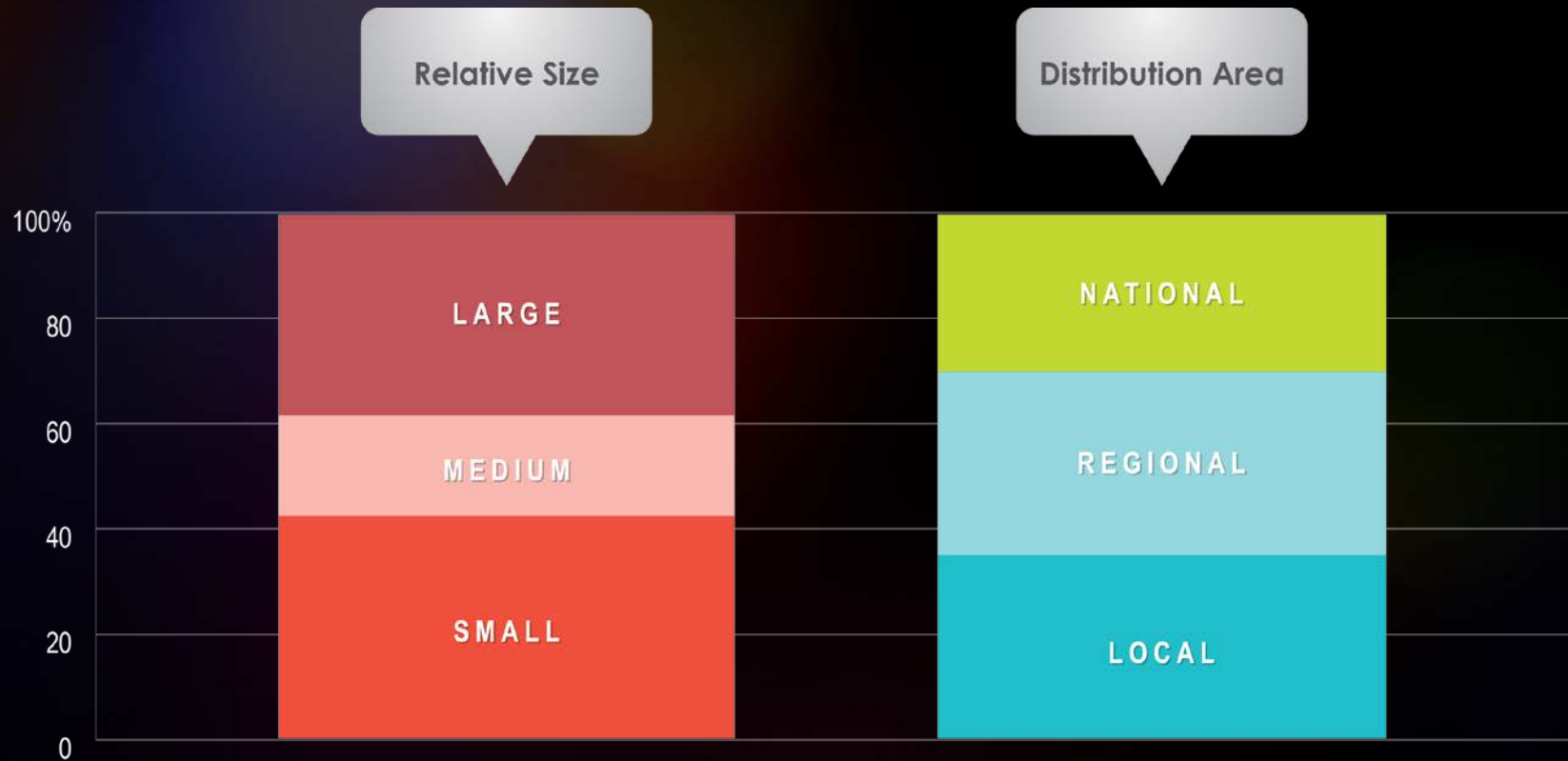
Final model will be released in early  
November



# Northwest Non-Residential Lighting Sales 2015



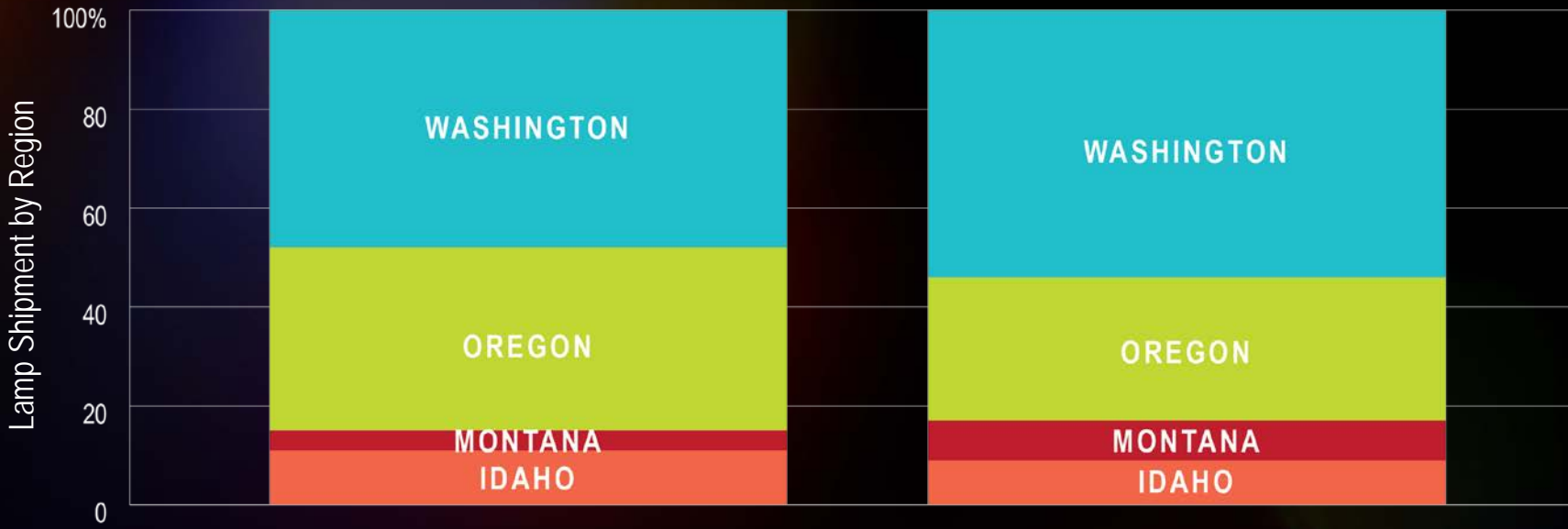
# Data Collected from 34 Distributors



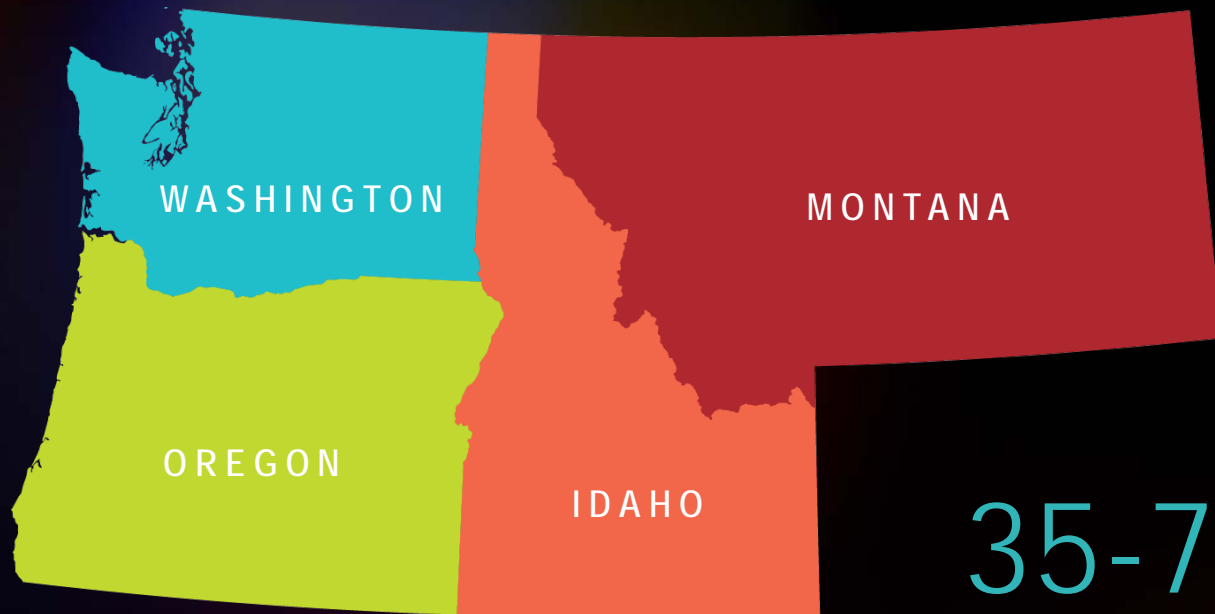


Our Data

Floor Space



Balanced regional representation



WASHINGTON

MONTANA

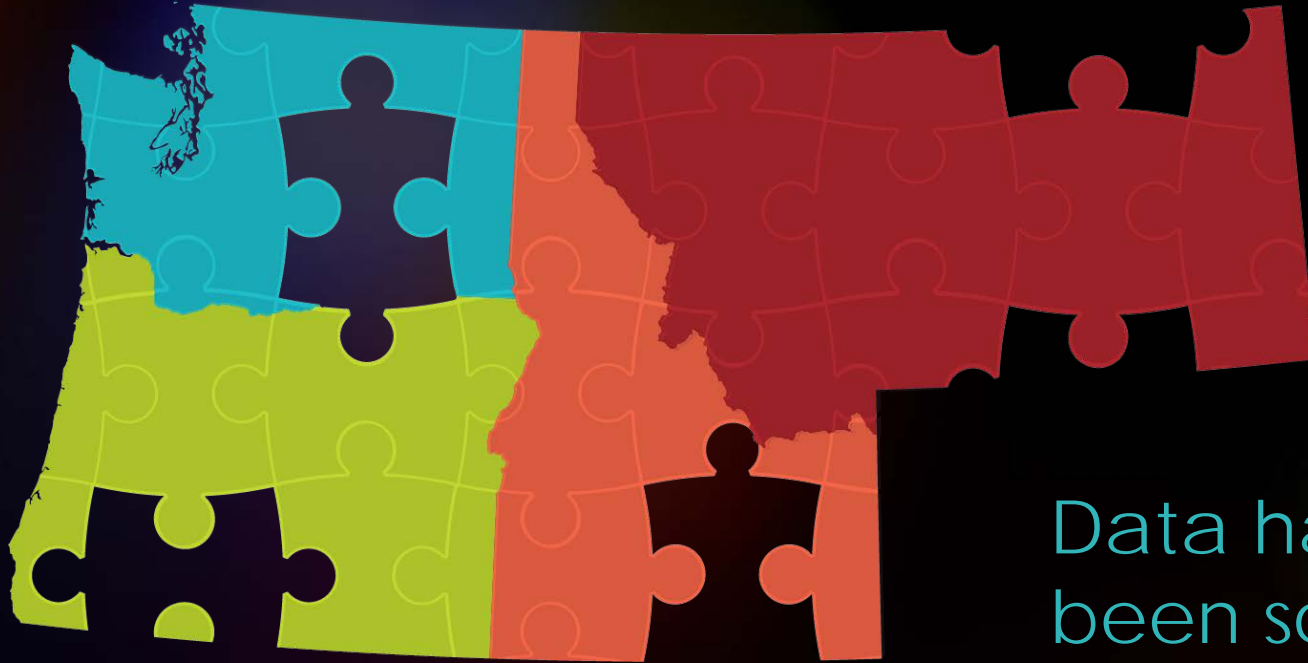
OREGON

IDAHO

35-70%

of the total market  
represented



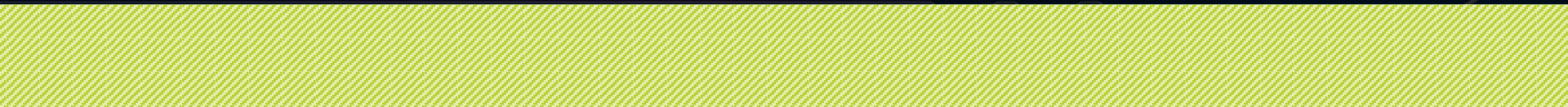


Data has not  
been scaled up  
to represent the  
total market



SALES DATA FINDINGS

# A MARKET IN FLUX

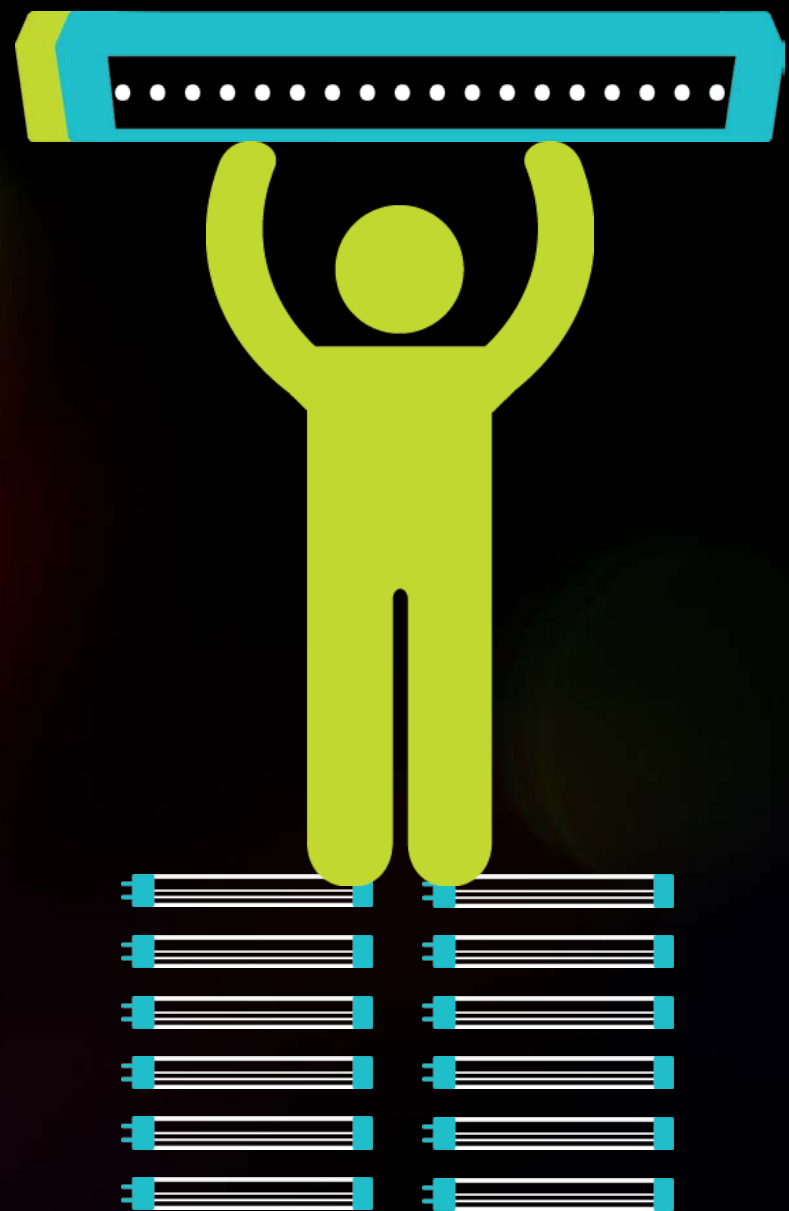




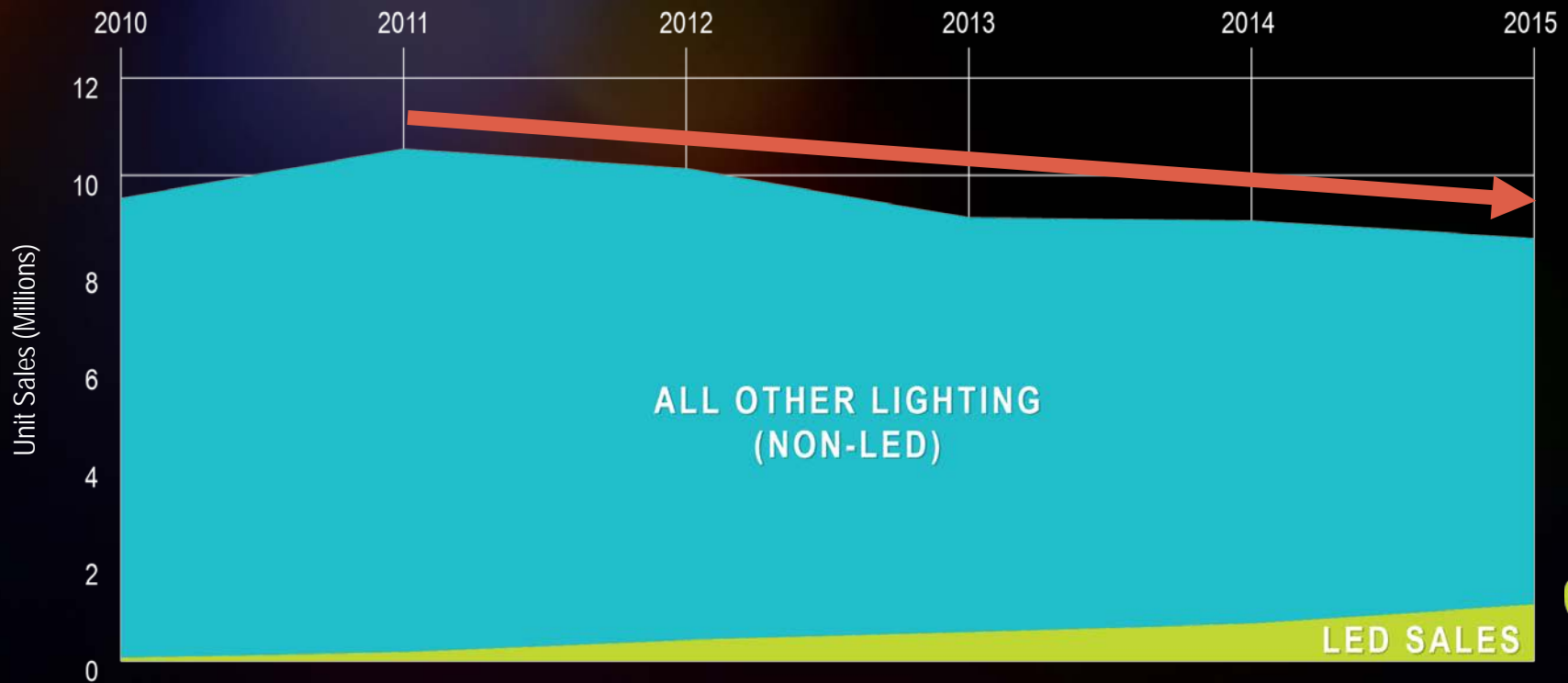
LED sales,  
while still a small  
part of the market,  
are booming



Long-life LEDs mean  
fewer replacements



# Total Unit Sales are shrinking

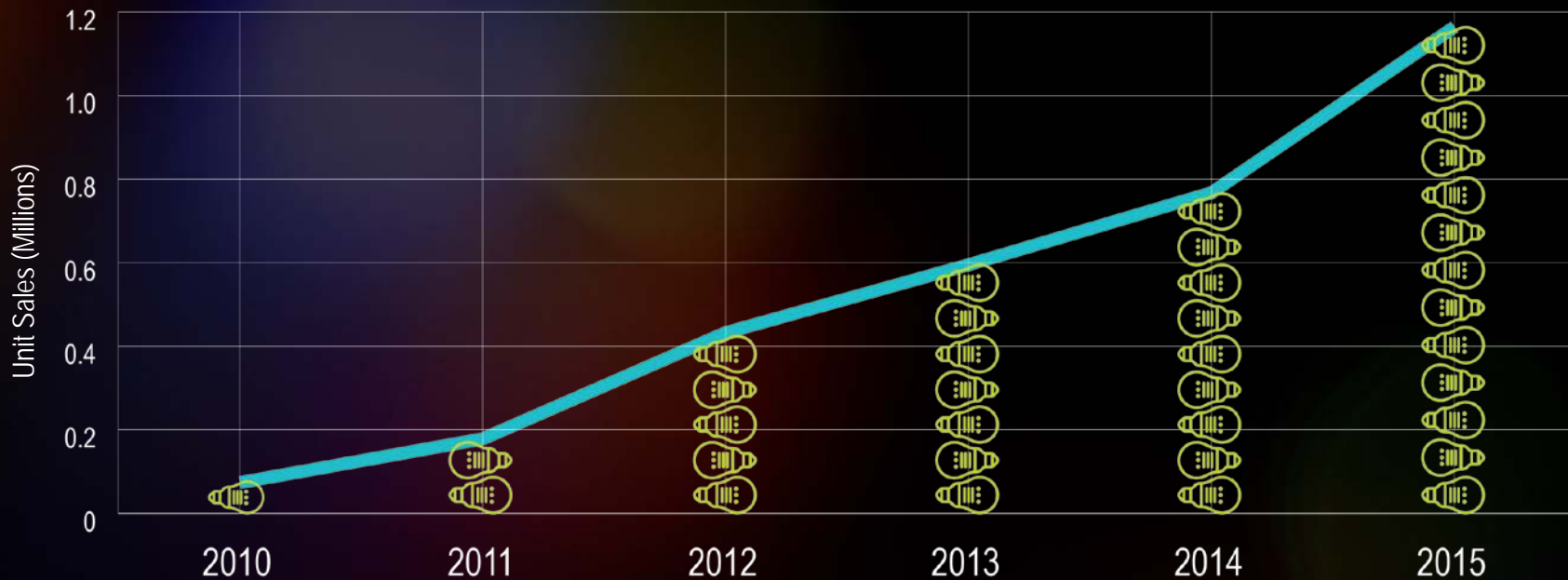


as LED sales grow

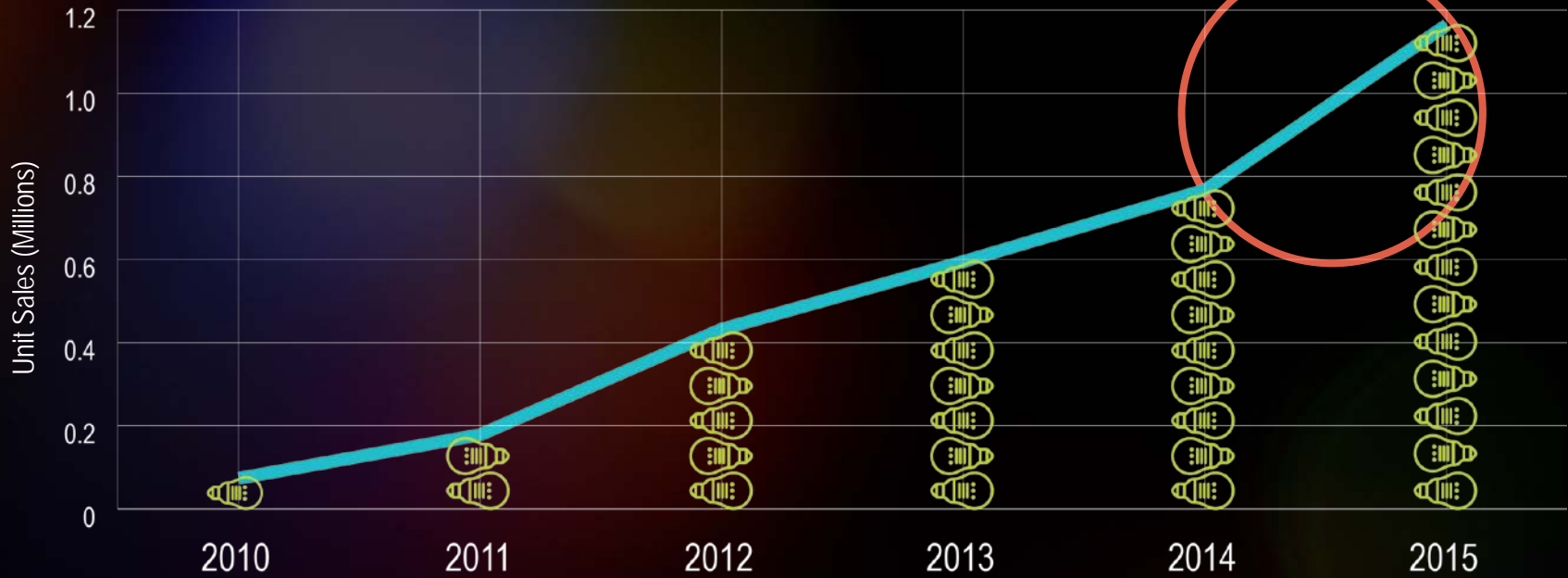


# Manufacturers are **Phasing Out** Legacy Products





But LED Unit Sales are Growing



But LED Unit Sales are Growing



LED GROWTH

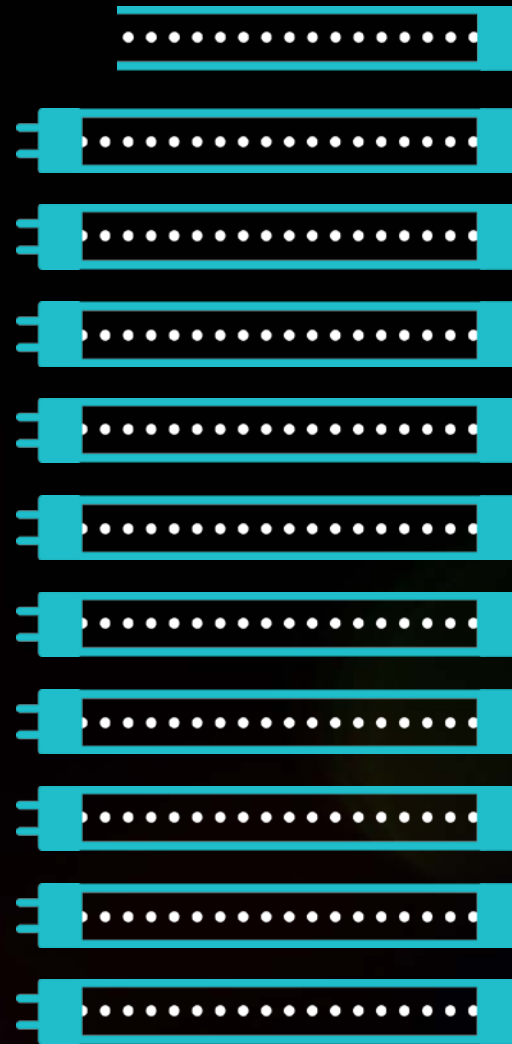
# Product Type Differences



2015 TLED Unit Sales  
saw 2.7x Growth



2014: 84.7K



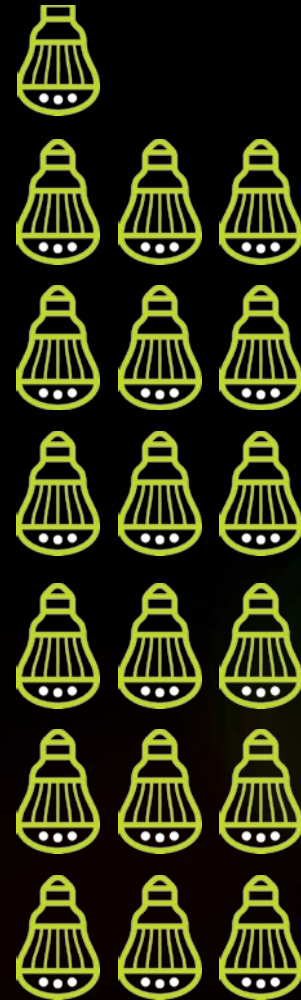
2015: 229.9K



# Downlights saw 2x Growth

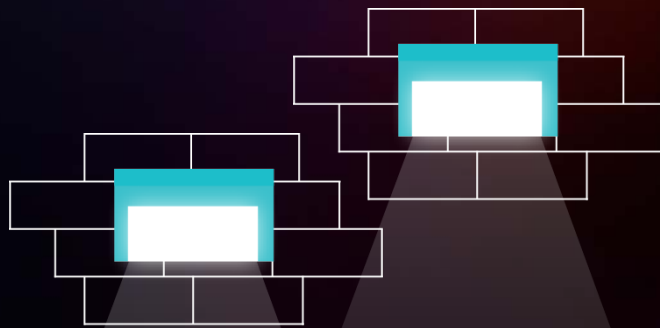


2014: 97K

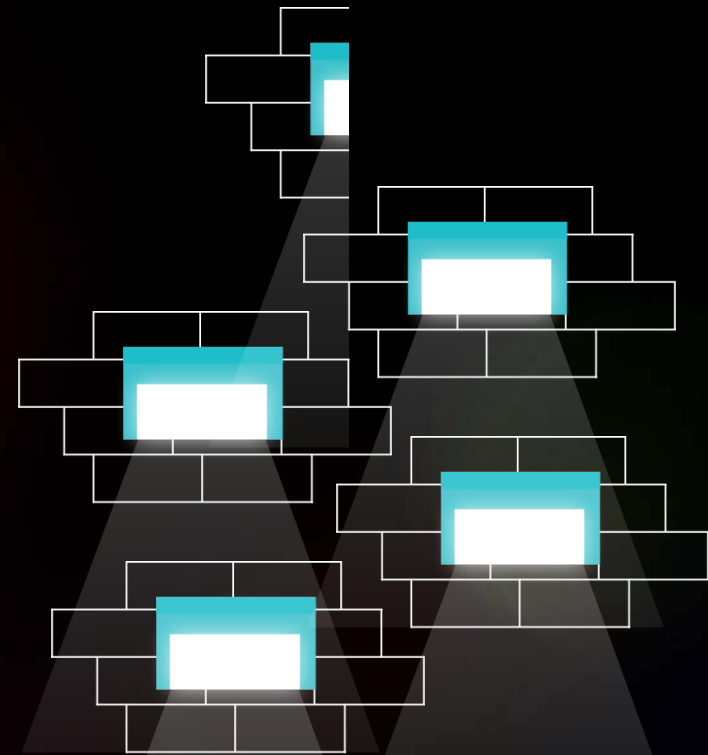


2015: 199K

# Fixtures saw 2.2x Growth



2014: 86K



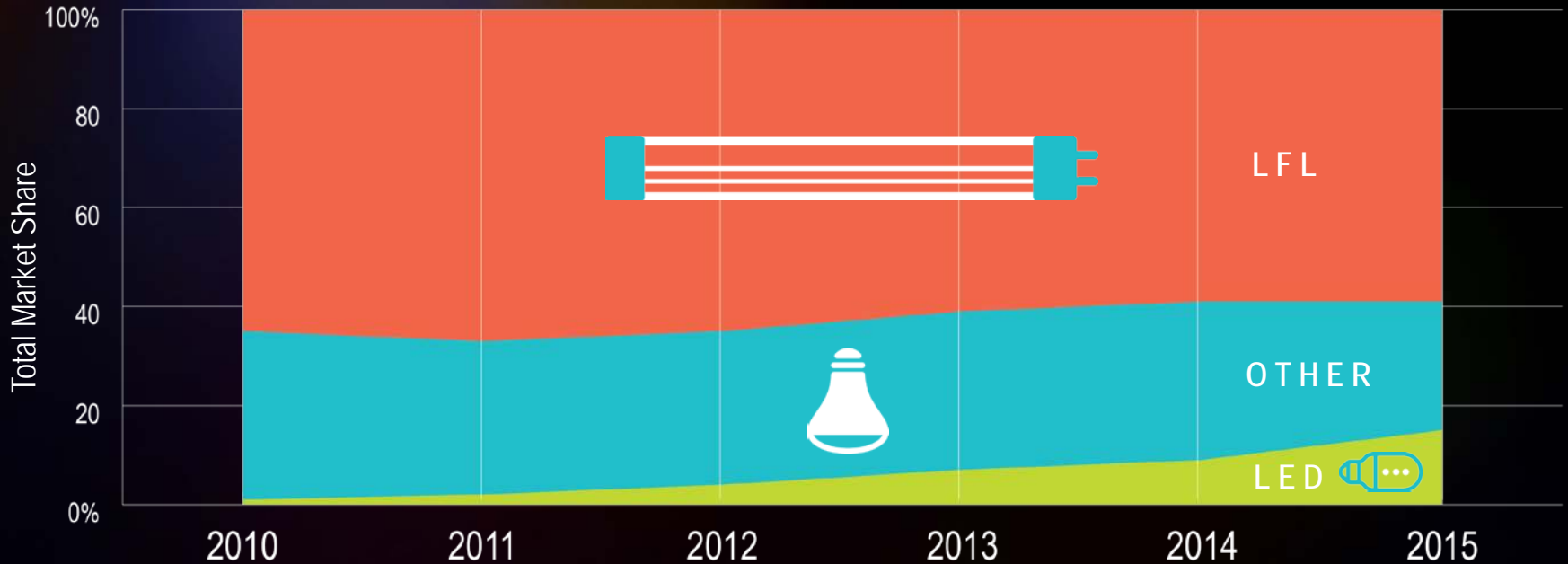
2015: 189K

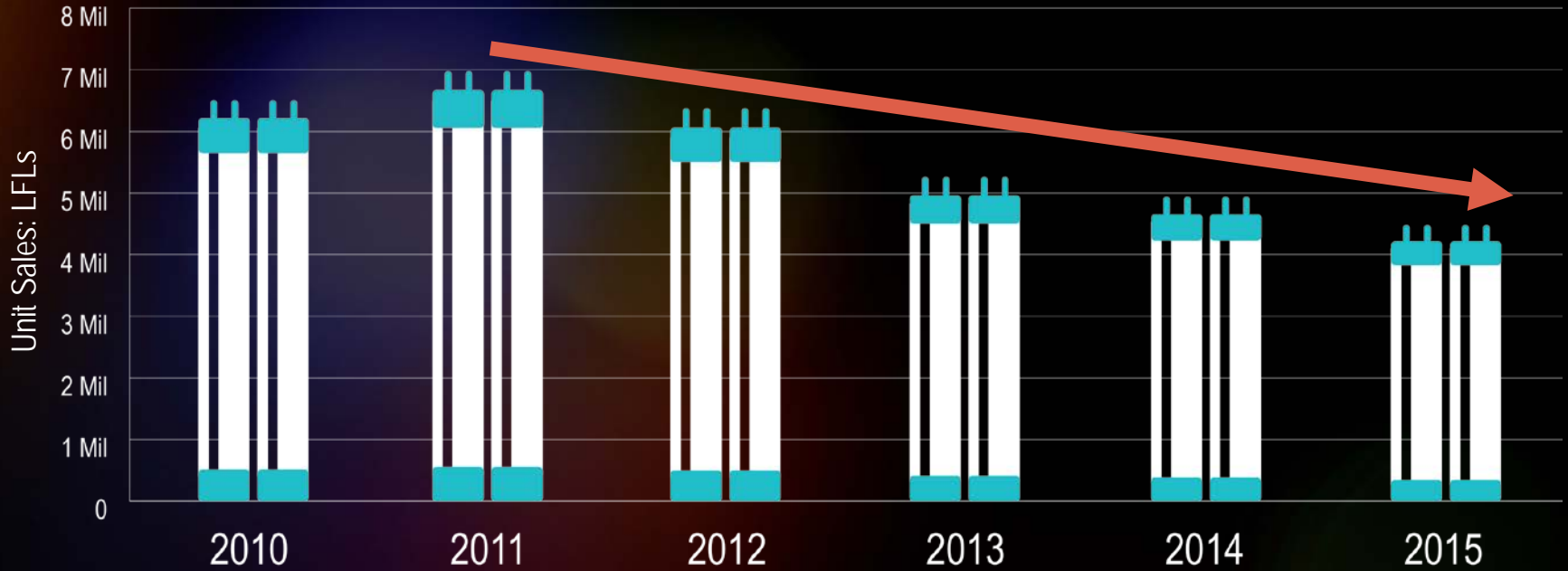


LINEAR FLUORESCENT LAMPS

Still Dominant

# LFLs Remain Dominant in Market Share





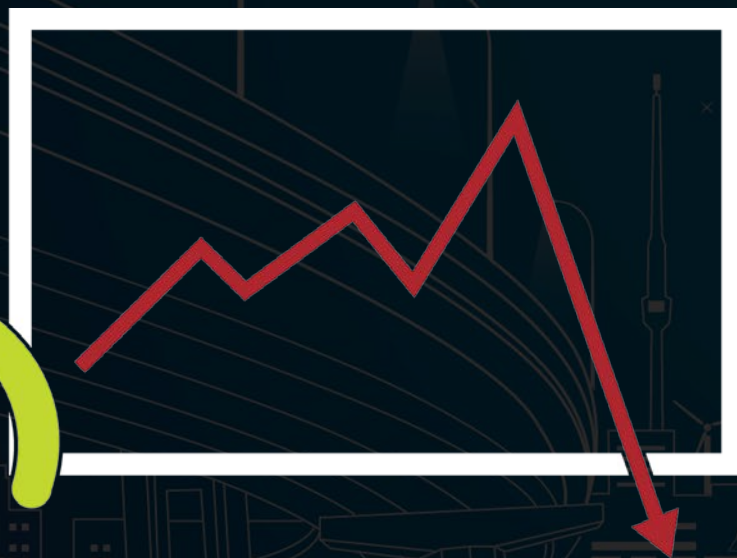
...but show **steady decline**  
in unit sales



LFLs are shifting toward more efficient options even as sales decline

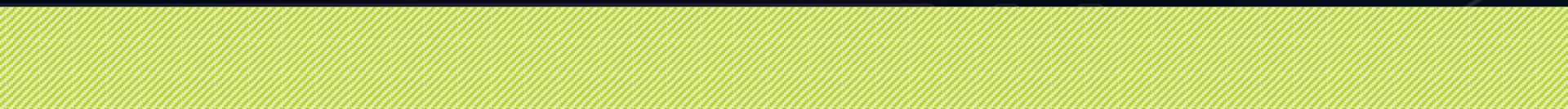






HID LAMPS

# Continue to Decline





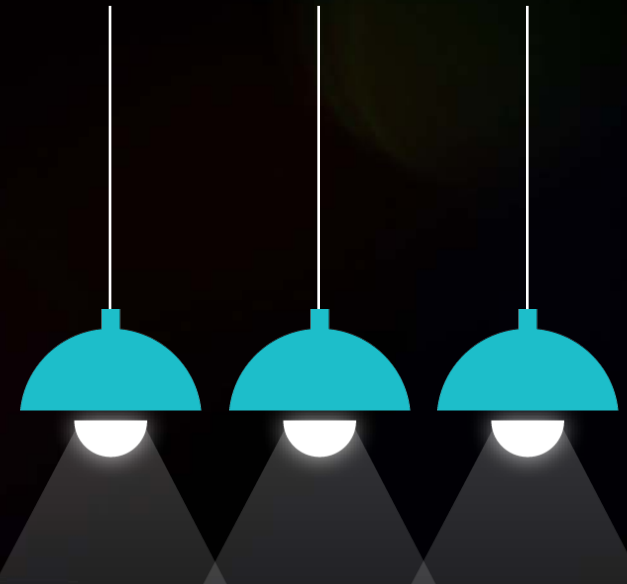
HID displaced by  
fluorescent and LED

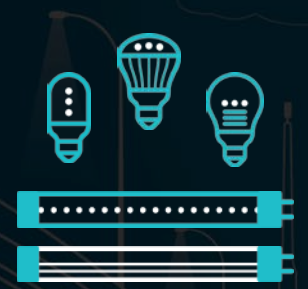


**2011:** 800K Units

**2015:** 300K Units

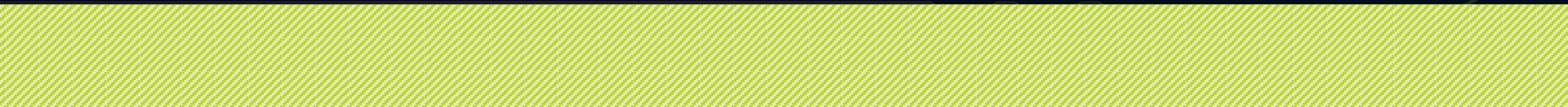
In 2015 HID Unit Sales  
dropped 37%





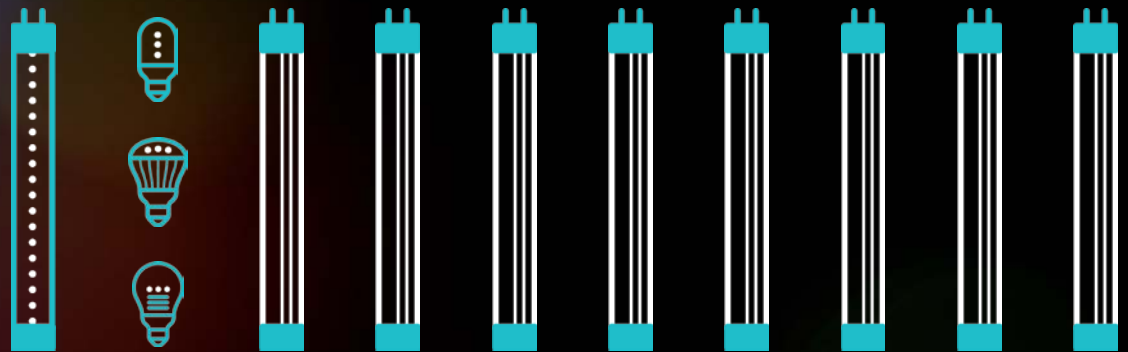
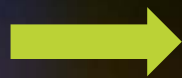
DYNAMIC FUTURE

# More Changes to Come

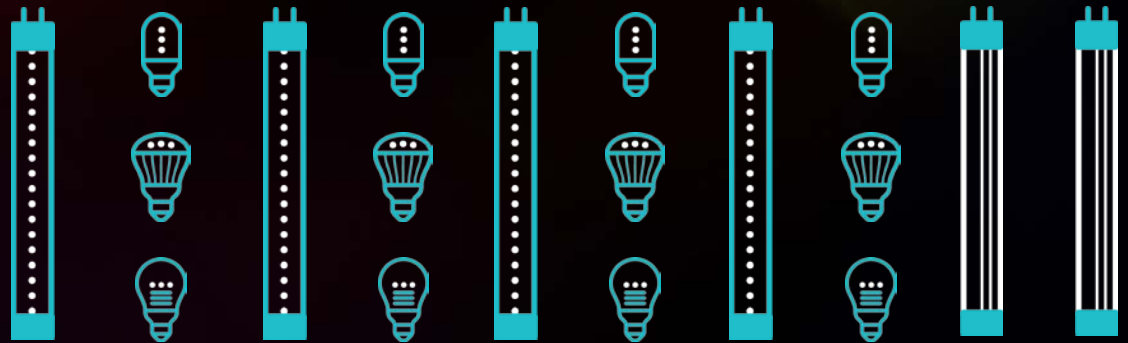


# LED in the mainstream

Today



2030



# CONDUIT ED & MOMENTUM SAVINGS

ETHAN MANTHEY





**BACK TO SCHOOL TIME!**

# conduit



## ***EMPOWERED***

Inspired by the idea that every energy efficiency professional working in the Northwest can be empowered by a deeper understanding of the fundamentals of energy efficiency.







# CONDUIT ED & MOMENTUM SAVINGS

## Syllabus

Week 1: What are Momentum Savings?

Week 2: Focus on residential HVAC

Week 3: Focus on residential lighting

Week 4: Focus on appliance standards

Week 5: Focus on non-residential lighting

Week 6: How do we know the savings are real?

Week 7: Wrap-up and Survey



- Home
- Explore
- Create
- Communities
- People
- About
- Help

Article

### Conduit ED Momentum Savings: The Syllabus



Posted by Conduit ED on 09/21/16  
Updated by Veronica Marzilli on 09/29/16

67 views • 0 comment

**EMPOWERED**

Inspired by the idea that every energy efficiency professional working in the Northwest can be empowered by a deeper understanding of the fundamentals of energy efficiency.



Energy efficiency is becoming more popular than Beyonce's new album *Lemonade*. The power needed to light the Northwest is dropping quickly, with LED adoption rates soaring. Appliance standards are ensuring that consumers

- This resourc
- Sector: Non
- Function: N
- Resources:
- Associated
- Conduit ED
- Series
- Add to My C
- Tags: Mom

Each article is designed to appeal to different levels of interest, with a 101, 201 and 301 option. If you want a high-level understanding, the 101 article and videos are for you! If you want to dig deeper, we have 201 and 301 content via reports and videos that delve deep.

Conduit ED is inspired by the idea that every energy efficiency professional working in the Northwest can be empowered by a deeper understanding of the fundamentals of energy efficiency. This web-based educational program provides the Conduit community a unique and interactive educational resource.

**Class begins October 6, so [sign up today](#).** Each week there will be a new article on Conduit to read. Ask questions and engage in discussion... and enjoy!

Here's a sneak peek at our Planned Syllabus:

**Week 1: What are Momentum Savings?**

**Week 2: Focus on residential HVAC**

**Week 3: Focus on residential lighting**

**Week 4: Focus on appliance standards**

**Week 5: Focus on non-residential lighting**

**Week 6: How do we know the savings are real?**

**Week 7: Wrap-up and Survey**

[Sign up for Conduit ED today by taking this poll](#)

## Conduit ED - What Do You Know About Momentum Savings?



Posted by Conduit ED on 09/14/16  
Updated by Lars Henrikson on 09/29/16

★★★★★ 157 views • 3 comments

Poll is Open

Conduit ED is a web-based educational program that provides the Conduit community a unique and interactive educational resource.

By taking this poll, you're signing up for the **Conduit ED: Momentum Savings series**, beginning this fall.

The "coursework" is fairly straightforward - it will consist of reading a few articles, viewing some videos, and completing a self-assessment survey. Tell us in the comments below what you want to learn about. If you think you know everything there is to know about Momentum Savings then give us a hard question.

We will try to answer these questions and give you a basic understanding of what they are, the valuable market research that we use to find them and how this helps strengthen our EE programs, regardless of where you are starting from.

### Conduit ED - What Do You Know About Momentum Savings?

- Beginner: I am new to this topic.
- Intermediate: I have heard of this but I don't know how it fits in with other EE savings.
- Advanced: I understand this concept well.

Please [log in](#) to vote and view results.

Go to Conduit for  
more information!

[ConduitNW.org](http://ConduitNW.org)

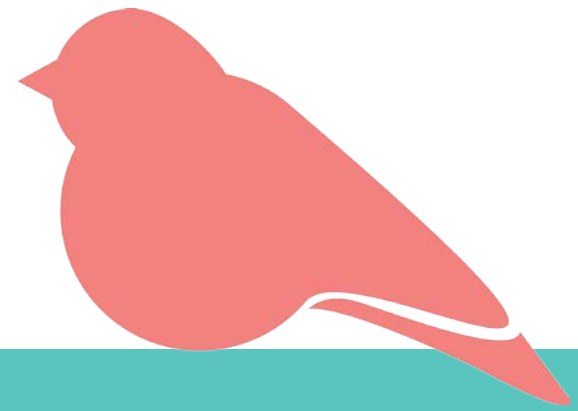
*Follow the elephant!*



# WATCH FOR

1. Draft non-residential lighting model
2. Lighting market intelligence booklet
3. Agriculture market presentation series
4. Conduit Ed Series - *Starts Tomorrow!*





Next meeting: **November 2<sup>th</sup> at 9am**