



# THE LIGHTING MARKET, TODAY AND TOMORROW

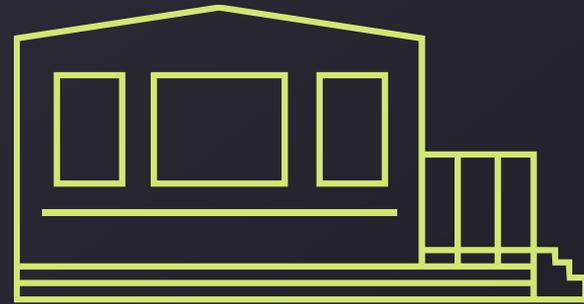
# THE LIGHTING MARKET IS CHANGING

Today

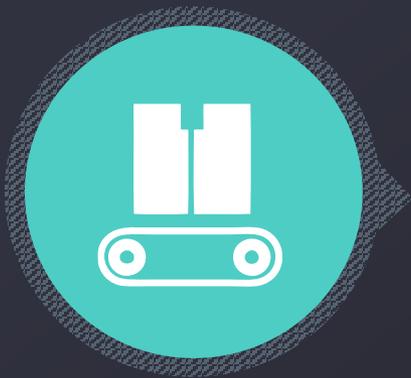
Tomorrow



# HISTORY CAN TEACH US



# THE PLAYERS



Manufacturers



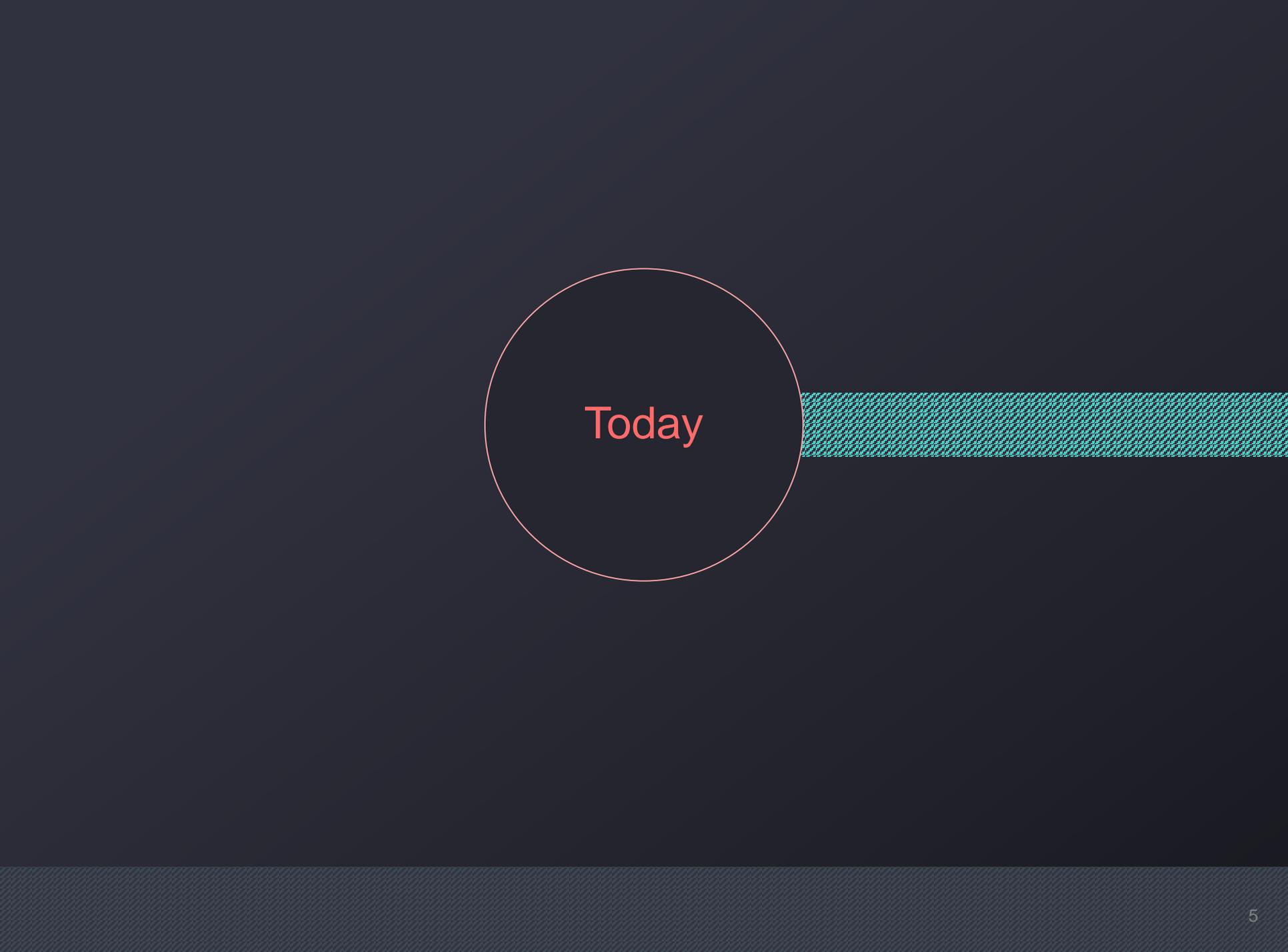
Distributors



Retailers



End-Users



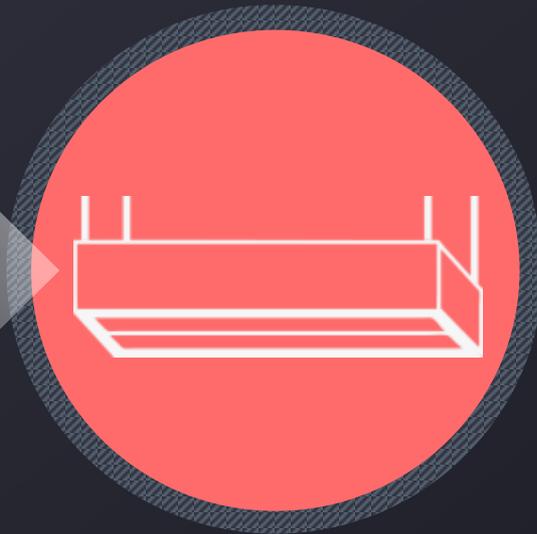
Today

# MANUFACTURERS

COMMERCIAL SPACE



Lamp Manufacturers



Fixture Manufacturers

# MANUFACTURERS

## RESIDENTIAL SPACE



Exclusive arrangements  
with retailers



Less profit than  
the commercial sector

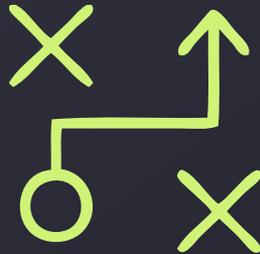


Intense competition  
for shelf space

# DISTRIBUTORS



Many market  
players



Few barriers  
to entry

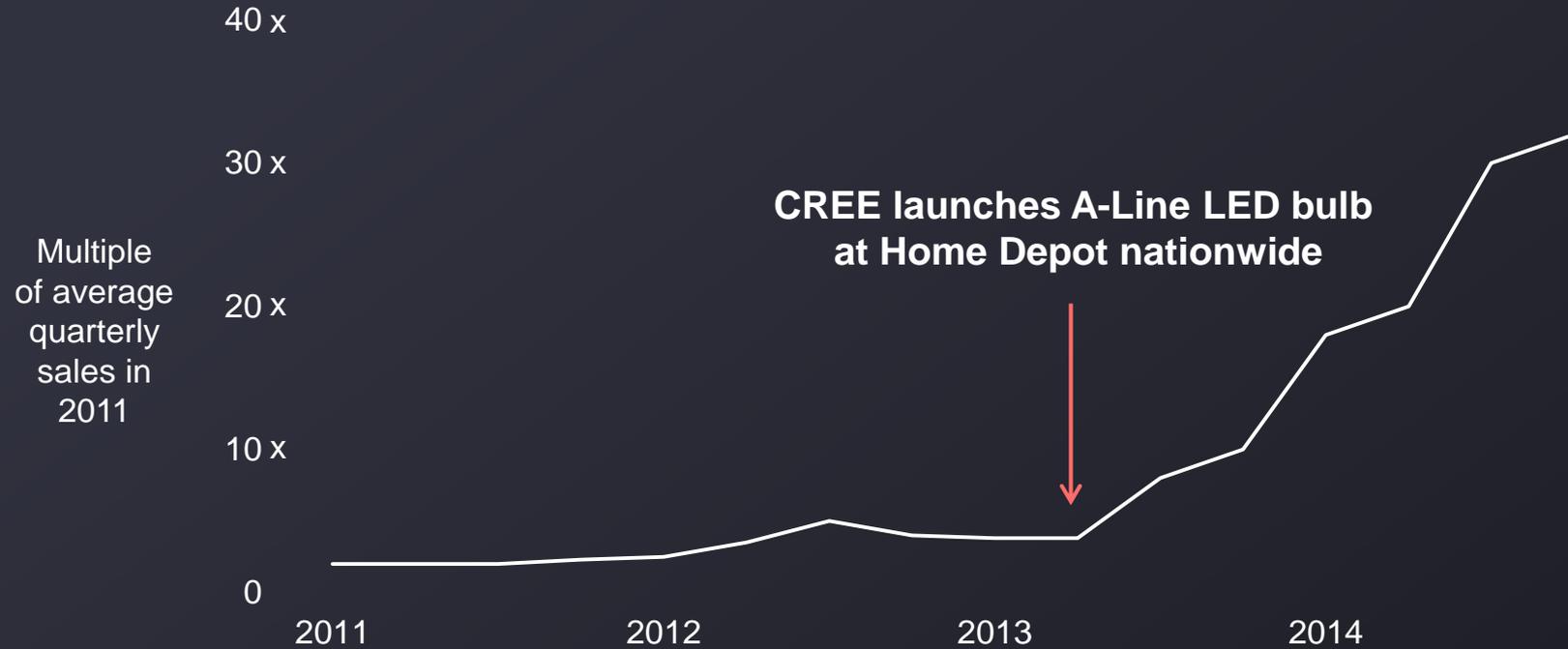


Market share  
diffusely spread

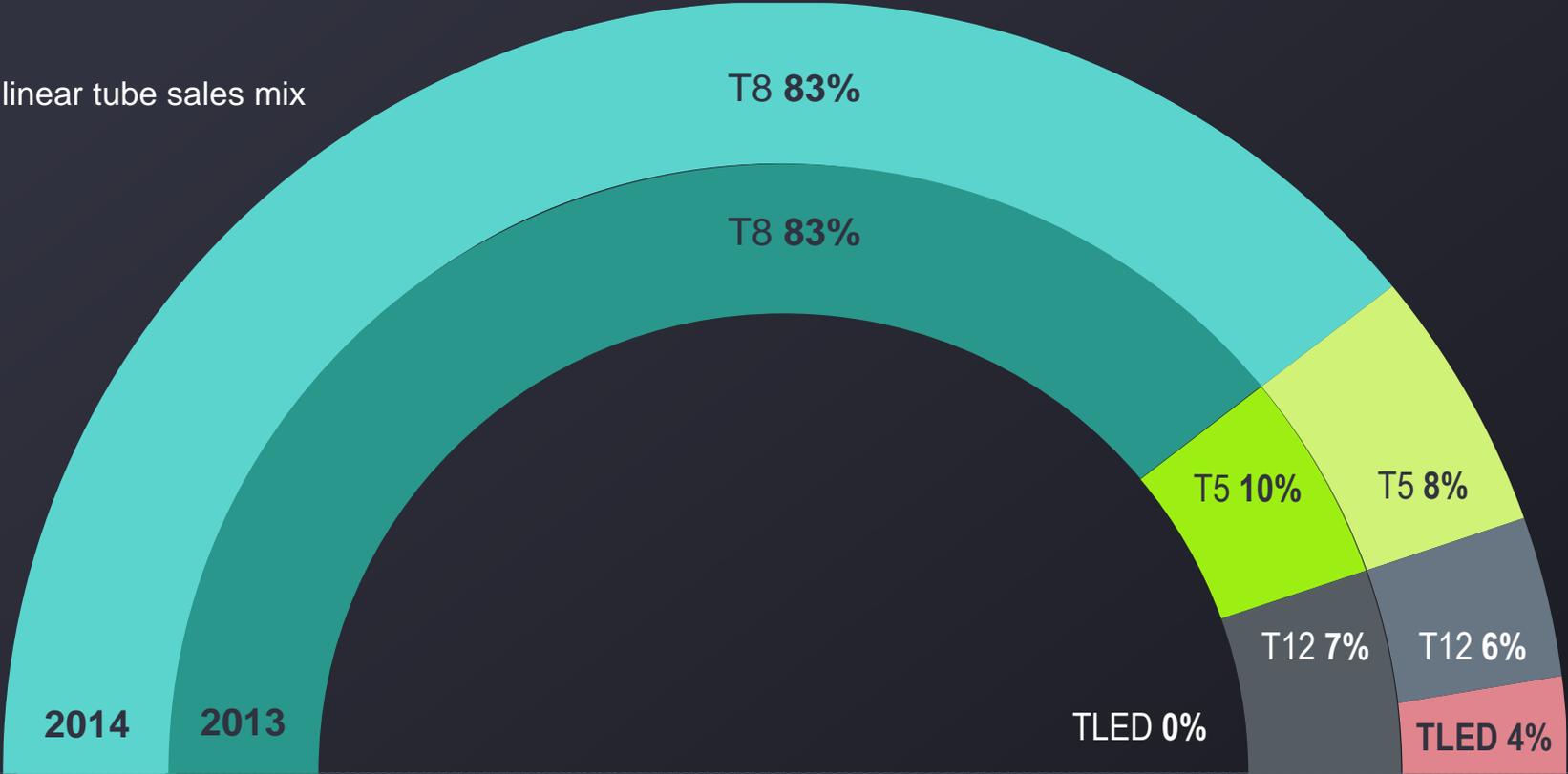
# RETAILERS



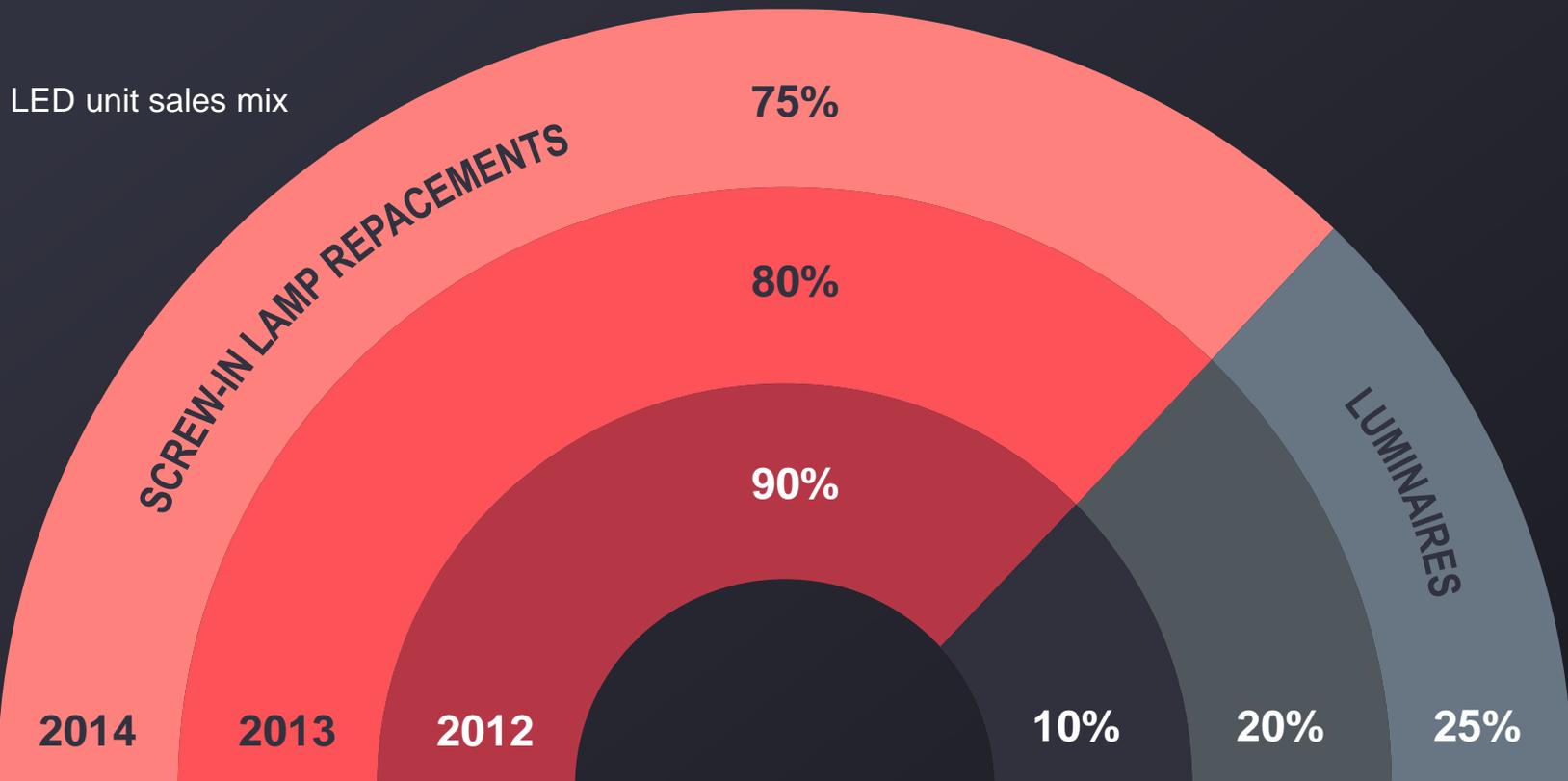
# GROWTH IN LED SALES



# FLUORESCENTS ARE STILL IN THE GAME

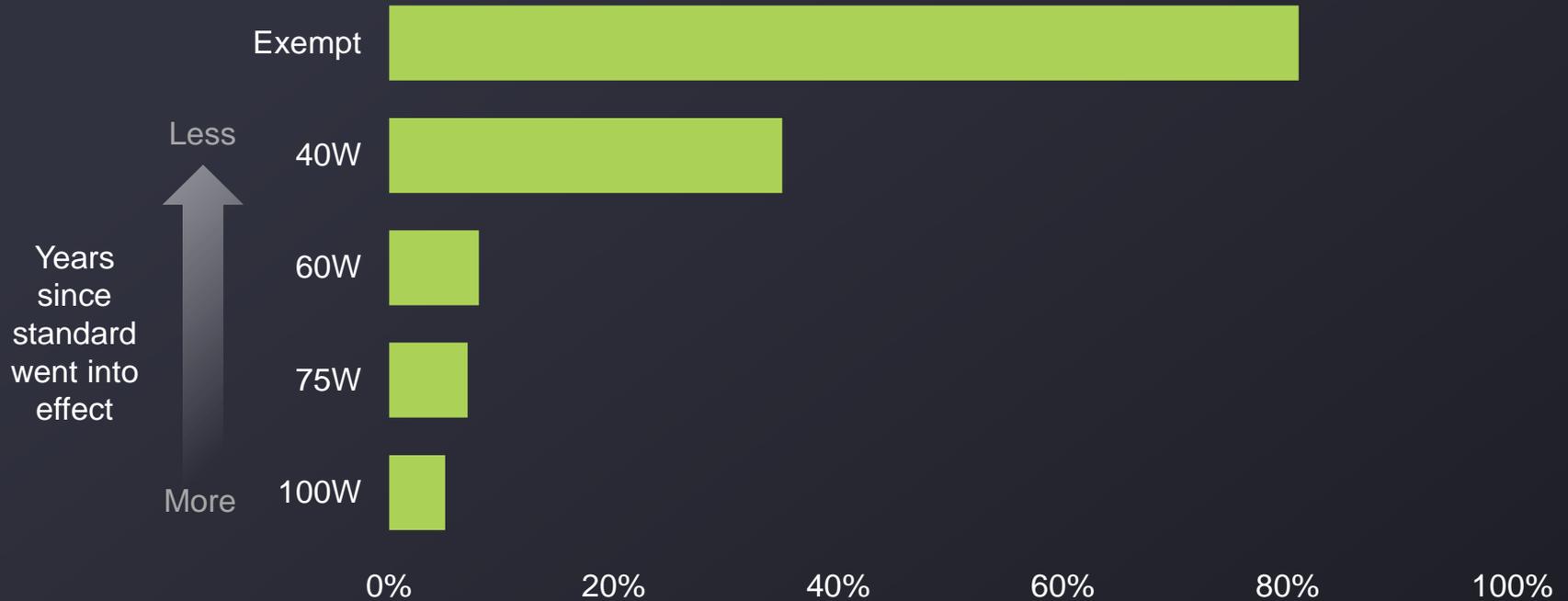


# STAND-ALONE LAMPS ARE STILL IN THE MIX



# RETAIL PRODUCT SHELVES

## INCANDESCENT

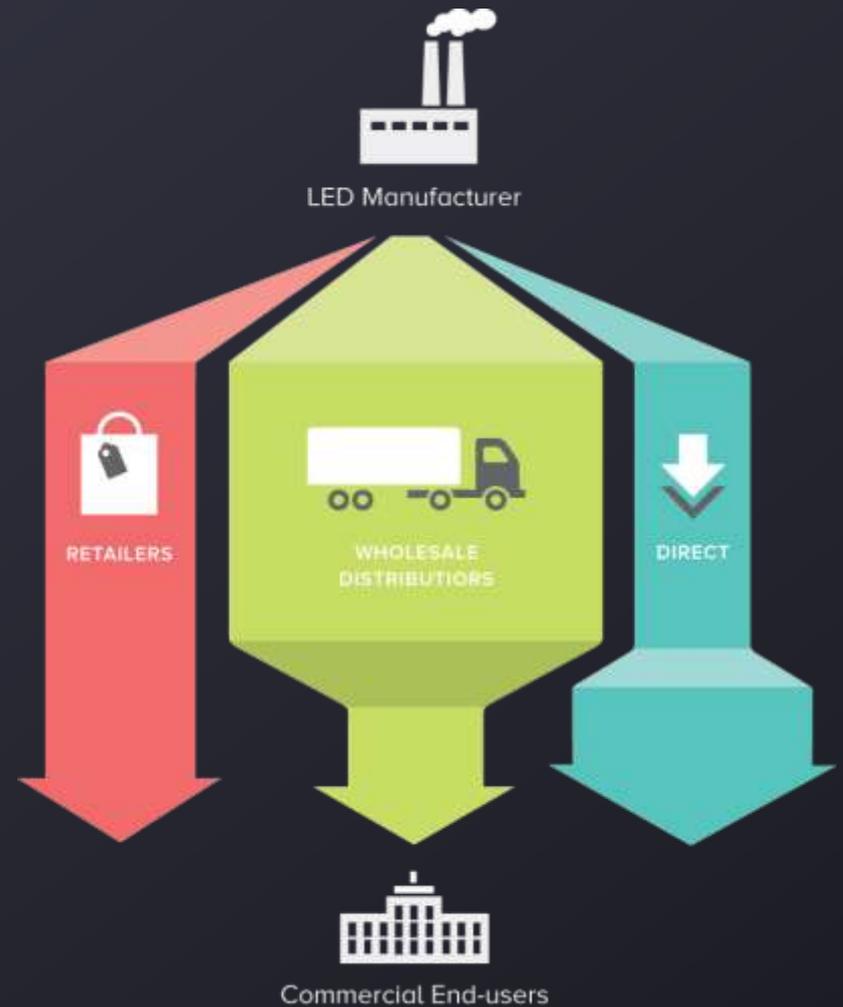


Northwest Retailer Technology Mix in 2014, General Purpose Lamps



Tomorrow

# MANUFACTURERS



# MANUFACTURERS

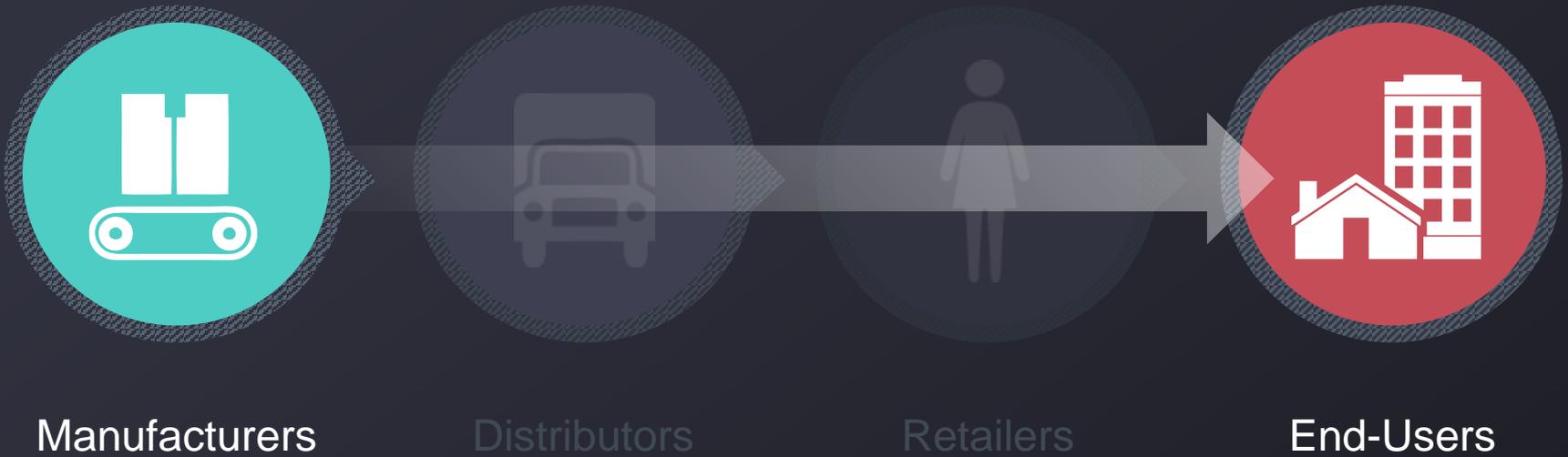


Low Margin on Lamps



Need for Differentiation

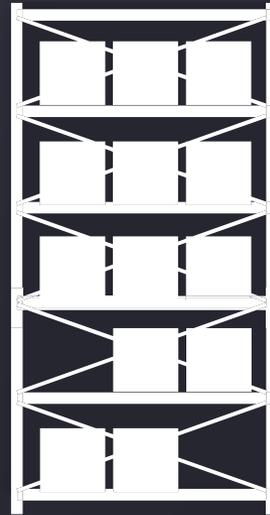
# DISTRIBUTORS



# RETAILERS



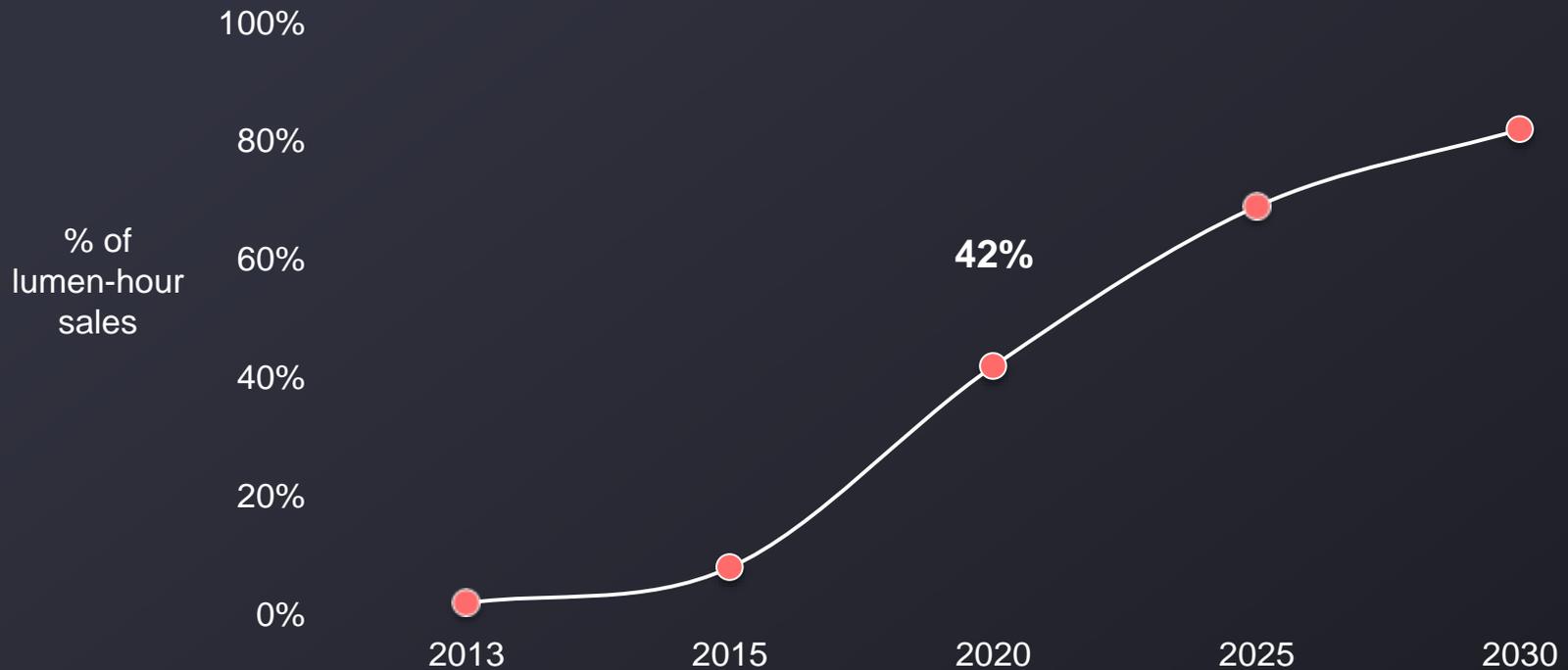
Less Frequent Purchase



Want Rather than Need

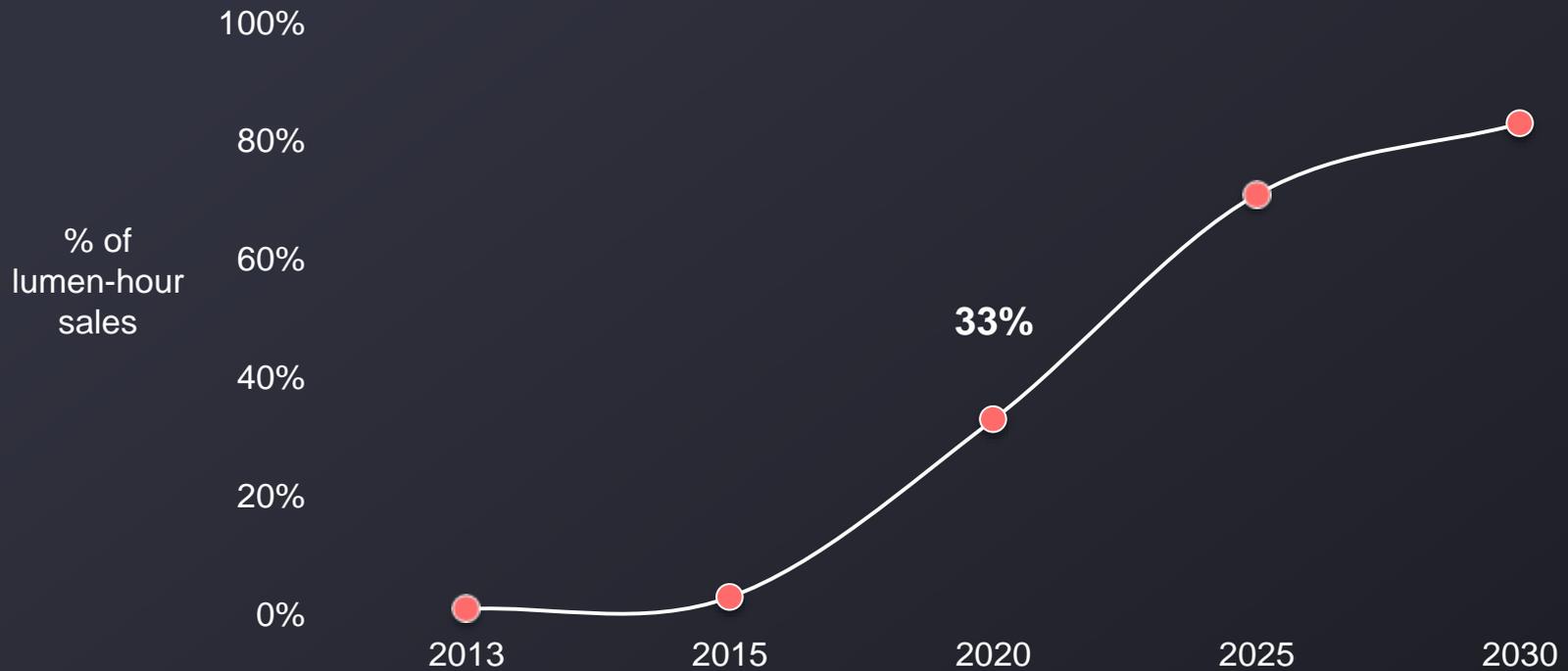
# FUTURE LED MARKET SHARE

## COMMERCIAL SPACE



# FUTURE LED MARKET SHARE

## RESIDENTIAL SPACE

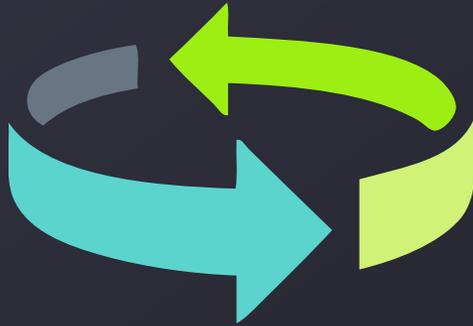


HOW DO WE KEEP UP  
WITH THE CHANGING  
MARKET?





NIMBLE WITH  
RELATIONSHIPS



# UNDERSTAND POWER DYNAMICS AMONG MARKET ACTORS

# TAILOR STRATEGIES TO MARKET SEGMENTS AND PRODUCTS

