

# EnergyWatch



August 2017

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<http://energywatchnews.com/>

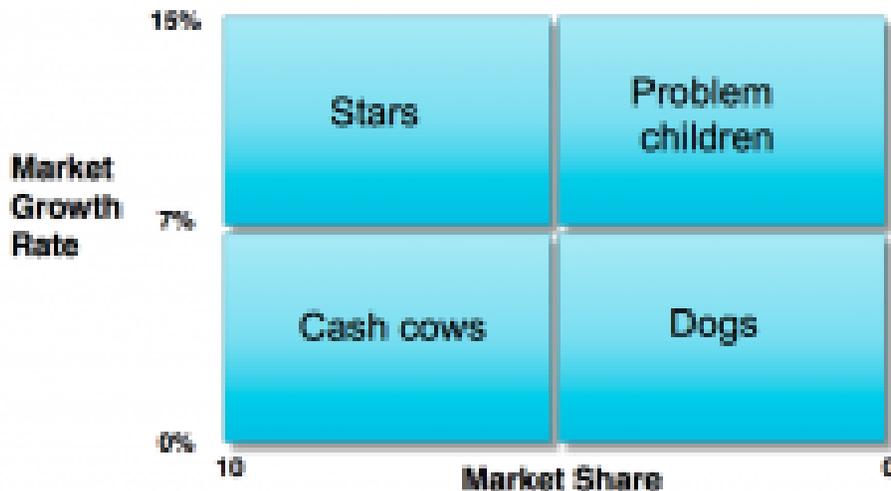
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*If you don't read the newspaper you are uninformed, if you do read the newspaper you are misinformed.* Mark Twain

*I take exception to saying that Bernanke, Obama, Reid and Pelosi are spending like drunken sailors. When I was a drunken sailor, I quit spending when I ran out of money.* Sen. John McCain

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*Something to Think About... What Do GE, Philips and Osram Have in Common?*



They all want OUT!....or do they? What keeps you up at night? I woke up in the middle of the night thinking I figured out where the Strategic Business Units (SBUs) of our friends in the lighting industry think they are and why they are making the decisions they are. If anyone out there has taken a marketing class, I'm sure you remember the Boston Consulting Group (BCG) matrix. It's all about market share and market growth and the strategic decisions one must make to continue to be viable. Over the next two (2) blogs, I offer a refresher course and how it affects the lighting industry, in my opinion:

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Cash Cows – let me start with Cash Cows as I believe that’s where the three (3) major traditional light bulb companies are.....GE, PHILIPS AND OSRAM. I specifically say “light bulb” companies because until recently all three were primarily in the aftermarket, the back-end, the replacement, MRO light bulb business. All three now are dabbling in the front-end, luminaire, fixture, new construction, what system goes into a building lighting business. That’s the business Acuity, Eaton and Hubbell dominate and never the twain shall meet, except when Philips decided to acquire Genlyte / Thomas. Cash Cows represent business units having superior market share in a mature, slow growing, fading industry. The Big Three in the legendary or traditional lighting industry comes to mind, ya think? Cash cows require little investment and generate cash that can be utilized for investment in Star business units. These SBU’s are the corporation’s key source of cash, and are specifically the base of an organization and their core business. Here’s what woke me up in a sweat: it dawned on me that when you feel your SBU is a cash cow, you want a financial executive to run that business, right? Cash cows make money and should be “milked” to provide as much cash as possible. But time will run out, it always runs out, and before you know it, you are heading into the DOG quadrant (no market / no share). So maybe that’s why the Big Three want OUT? I’m just sayin.....

- Let’s look at GE first: remember Jack Welch and his vision statement to all of GE’s SBUs: GE to be the most competitive enterprise in the world by being Number 1 or Number 2 in every business in which we compete.....OR WE WILL GET OUT! Most forget about the consequences. That my friends, is what General Electric is still all about. GE has been milking the traditional light bulb cash cow for the last 30 years. It’s time to sell it off before it becomes a DOG. Enter Bill Lacey, former CFO of GE Lighting, promoted early last year to run the traditional GE Lighting in Nela Park as its CEO. Who better than a seasoned financial executive to continue the milking and negotiate the divestiture. Oh, where’s Maryrose Sylvester, former CEO of GE Lighting, you ask.....well, she moved to Boston to run the new GE digital lighting business, Current, Powered by GE and I quote: “the smart, connected, commercial space for lighting.” Current is not for sale so that tells me that GE does not want to get out of the lighting business, and since lighting is going thru a metamorphosis, GE wants to lead the way in the new Intelligent Lighting business. They just moved this new SBU into the Problem Child cell for now but the direction is to move it to a Star (remember #1 or #2).....more on that later.
- LEDvance has emerged from the general lighting business of Osram / Sylvania. It had extended its product line from standardized and traditional light sources to advanced LED lamps and intelligent lighting products. Then in March 2016, LEDvance sold to a Chinese investment consortium consisting of IDG Capital, MLS Co, Ltd and Yiwu State-owned Assets Operation Center. They are OUT! MLS, Forest Lighting in the USA, is a formidable global lighting company worth watching. Lawrence Lin, Executive General Manager at MLS Co., told ChinaDaily that “LEDvance is set to become one of the top three lighting corporations within three years.” However, to be fair, Osram Opto Semiconductors is betting big on expanding its manufacturing of the LED chips that go into lamps and systems for general lighting, spending a billion euros to build a new plant in Malaysia for that purpose.



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- Philips: when my ole company acquired Gentlyte / Thomas for \$2.7 billion back in 2007 to make it the top lighting company in North America, I really thought they would dominate both the front-end luminaire market as well as the back-end MRO aftermarket in North America. No one, not even GE was positioned that way. Then acquisitions of Color Kinetics, Lumileds, other acquisitions and many cooperative partners added to a really dominant position. Right? Well, I guess, it just did not work out. Philips announced that it planned to spin off its iconic lighting division so it can focus on its future as a health technology provider. In May 2016, Philips sold 25 percent of their lighting business in an I.P.O. offering. If an over allotment of shares is fully exercised, Philips would still own 71.25 percent of the lighting business but said it plans to fully sell down its ownership over the next several years. Recently, Apollo and Philips agreed to a transaction where Philips would sell 80.1% interest in Lumileds, their core technology lighting company, to certain funds managed by Apollo and retain the remaining 19.9% interest in the company. Why do they want OUT? My opinion: too many challenges posed by diminishing market share, sales and profits, and the long life and steadily dropping prices of LEDs. Health technologies (Star) offer more upside potential.....and as long as they keep sending my pension check, A Salute, Buona Fortuna!

How about this Folks? Are you up for a summer assignment? Well, I'll start it if you finish it...

Three blogs:

- 1) This blog by me: What Do GE, Philips and Osram Have in Common?
- 2) Next blog by me: Stars / Problem Children / Dogs Defined
- 3) Your assignment: fill in the Boston Consulting Group (BCG) matrix with the names of the current major players in the lighting industry....instructions to follow.

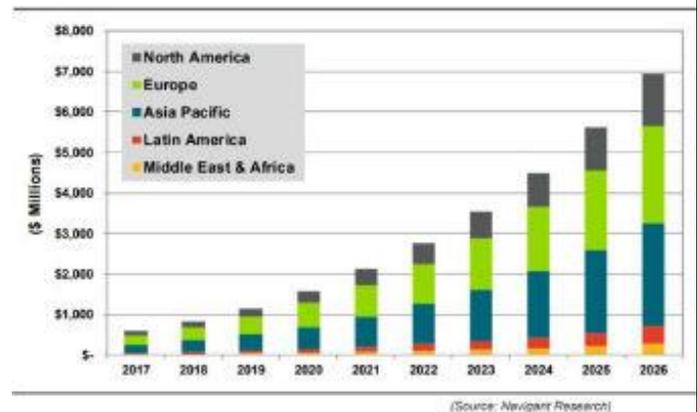
Who wants to play? I will then post the consensus BCG matrix with the names of the major lighting companies in their respective quadrant. Should be fun.....

## LED EnergyWatch...

1. **Smart Street Lighting for Smart Cities to Reach 73 Million Installed Units by 2026** - This Navigant Research report analyzes the evolution of smart street lighting technology and market trends, with a focus on how smart street lighting can be used as a platform for additional smart city applications. Smart LED streetlights LEDs are now the standard replacement for legacy lighting in most cities around the world. At the same time, smart controls

are becoming more mainstream and are increasingly installed alongside LED deployments. Adding controls to street lighting systems offers many benefits, but controls technology is not being adequately exploited. The vision of a city lighting network is one that provides a platform for a range of innovative smart solutions, helping cities increase efficiency, raise additional revenue, keep residents safe, improve sustainability, and make them attractive to new residents and businesses.

<http://www.navigantresearch.com/research/smart-street-lighting-for-smart-cities>



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2. ***The National Academy of Sciences, Engineering, and Medicine (NAS) Has Published a Report - Entitled Assessment of Solid-State Lighting, Phase Two.*** The DOE SSL Program features prominently in the new report, as the lead federal organization driving SSL advances. The new report focuses on three key areas: commercialization (noting the rapid uptake of SSL since the 2013 report), technology development (updating the findings of the 2013 report), and manufacturing. In the process, the NAS committee has updated material that was presented in the earlier study. <https://www.nap.edu/catalog/24619/assessment-of-solid-state-lighting-phase-two>
3. ***Connected Public Lighting: A Powerful Accelerator for Smart Cities by Susanne Seitinger*** - The analyst firm Gartner calculates that 8.4 billion connected objects will be in use in 2017, an increase of 31 percent from 2016.[1] As urban migration increases and connected devices proliferate, these parallel trends promise new links between physical spaces and digital infrastructures that increasingly include light-emitting diode (LED) street lighting, site lighting, and architectural lighting. For municipalities, these two trends present an opportunity and a challenge. Cities small and large are flourishing, but the strain on infrastructure and services is burgeoning. Leaders increasingly reference the potential for real-time information and controls that improve city services and enhance quality of life. [http://www.nxtbook.com/ygsreprints/NEMA/g78283\\_nema\\_july2017/index.php#/12](http://www.nxtbook.com/ygsreprints/NEMA/g78283_nema_july2017/index.php#/12)
4. ***Bluetooth's Range Just Widened, and IoT Lighting Companies are Thrilled*** - After at least two years of internal wrangling and difficult technology choices, the Kirkland, WA-based Bluetooth Special Interest Group (SIG) ratified a means to mesh together Bluetooth beacons, allowing them to hand off instructions to each other. The move effectively boosts Bluetooth's reach far beyond the 30 ft that is typical for the Bluetooth that consumers commonly use to share things like audio files among smartphone, computers, tables, TVs, and other devices. The mesh standard applies across all possible commercial, industrial, and residential information technology uses. The lighting industry is one group in particular that is welcoming the move. As *LEDs* has been reporting for some time, mesh could help buoy IoT lighting, making it more likely that smart lights can cover large areas of retail stores, warehouse, commercial offices, and other locations. <http://www.ledsmagazine.com/>
5. ***Eleven New SBIR-STTR Grants Awarded for SSL Technology*** - The U.S. Department of Energy Office of Science has awarded 10 Small Business Innovation Research (SBIR) grants and one Small Business Technology Transfer (STTR) grant for projects targeting critical advances in solid-state lighting (SSL) technology. The 11 FY17 grants will explore the technical merit and commercial potential of different innovative concepts or technologies that are expected to contribute to the achievement of the price and performance goals described in DOE's SSL R&D Plan. Complete list at: <https://energy.gov/eere/ssl/eleven-sbir-sttr-grants-selected-award-ssl-technology-fy17>
6. ***How is DLC 4.2 Affecting Rebates?*** - Earlier this year, Design Lights Consortium (or "DLC") implemented a new version of their LED specifications. They were meant to further advance LED technology in the marketplace and, for most LED products, it required improved efficacy (increased lumens per watt). On April 1st, products that did not meet this specification were removed from the DLC list. It is crucial that you verify the product you are using is on the most current DLC 4.2 list. You can see it listed at: <https://www.designlights.org/search/?search=DLC%204.2> For additional information on rebates: <http://briteswitch.com/news/DLCandRebates.html>



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7. ***Want to Know More About Power over Ethernet (PoE)? Check out: LuxReview -***
- <http://luxreview.com/article/2017/07/igor-answers-your-power-over-ethernet-poe-questions>
  - <http://luxreview.com/article/2017/07/can-i-install-poe-at-home-and-what-would-that-look-like-to-me->
  - <http://luxreview.com/article/2017/07/what-are-the-practical-benefits-of-poe-and-what-can-be-powered-and-controlled-by-poe-today->
  - <http://luxreview.com/article/2017/07/what-does-it-look-like-to-install-poe-and-who-can-do-it->
  - <http://luxreview.com/article/2017/07/how-does-power-over-ethernet-poe-lighting-work->
8. ***Current, Powered by GE Reaches Digital Lighting Milestones with 200 Million Square Feet of Wireless Controls -*** Over the past year, the company has expanded its development partner ecosystem to more than 100 companies, and its Daintree wireless control networks are now installed across locations spanning 200 million square feet of space in commercial buildings, retail stores and industrial facilities. Current combines the capabilities of GE's energy-efficient LEDs with cutting-edge sensors and software built on the power of Predix, GE's operating system for the Industrial Internet. In April 2016, Current acquired Daintree Networks to expand its digital capabilities for small and mid-sized buildings and enhance its intelligent lighting portfolio. <http://lightingcontrolsassociation.org/>
9. ***Lumileds Is Now Officially an Independent Company -*** Lumileds announced that funds affiliated with Apollo Global Management, LLC and Royal Philips completed their previously disclosed transaction, resulting in Lumileds operating as an independent company. As announced in December 2016, Apollo and Philips agreed to a transaction where Philips would sell 80.1% interest in Lumileds to certain funds managed by Apollo and retain the remaining 19.9% interest in the company. Apollo is a leading global alternative investment manager with assets under management of approximately USD 197 billion\* in private equity, credit and real estate funds, invested across a core group of nine industries, where Apollo has considerable knowledge and resources. <http://bizled.co.in/lumileds-is-now-officially-an-independent-company/>
10. ***DOE Publishes CALiPER Snapshot on LED Downlights -*** There are many factors that influence product efficacy, but the efficacy trend with LED downlights is concerning. The importance of efficacy gains is not solely related to energy savings. Improved LED package efficiency can simplify thermal management and allow more flexibility in product design, ultimately reducing product cost. With the average LED Lighting Facts-listed downlight at just over one-third of the DOE target for efficacy for LED luminaires (203 lm/W by 2025), there's substantial room for continued performance gains, which should not be overlooked. For a closer look at the findings, download at: <https://energy.gov/eere/ssl/downloads/snapshot-downlights>
11. ***Recall: Light Fixture Recalled Due to Impact Hazard -*** The plastic diffuser lens on Lithonia Lighting's LBL4W model LED ceiling light fixtures can detach and fall unexpectedly, posing a risk of injury from impact. About 5,600 units have been recalled after the company received six reports of loose or falling diffuser lenses, according to U.S. Consumer Product Safety Commission recall 17-172. No injuries have been reported. For more information, contact Lithonia Lighting at 888-876-4181, or at [www.lithonia.com](http://www.lithonia.com) and click on "LBL4W LED Recall."



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- 12. *The Lighting Fixtures Market in the United States by CSIL Milano*** - The value of USA domestic market in 2016 is estimated to be \$20.3 billion, with a 3% increase compared to 2015. US production of lighting fixtures in 2016 amounted to \$12.9 billion. In 2015, it overcame the pre-crisis level and in 2016 continued its positive trend (+11.6% on the previous year). More specifically, the production of residential lighting remained stable, ending the negative trend that characterized the previous years; while the production of professional luminaires kept on growing at high rates. On the other hand, international trade faced a setback as both imports and exports contracted by respectively 9% and 8%. The LED-based segment reached 51.4% of the total market in 2016; it has been growing especially for the outdoor lighting applications, where today it accounts for around 70% (10 percentage points more than the year before). Overall, in 2016, the growth rate of LED fixtures consumption was 26%. <https://www.lighting.csilmilano.com/report/the-lighting-fixtures-market-the-united-states-0058484.html>
- 13. *Potential Risks to Human Health of Light Emitting Diodes*** - Following a request from the European Commission, the Scientific Committee on Health, Environmental and Emerging Risks (SCHEER) reviewed recent evidence to assess potential risks to human health of Light Emitting Diodes (LEDs) emissions. The review of the published research conducted by the SCHEER has led to valuable conclusions and identified certain gaps in knowledge on potential risks to human health from LEDs. The Committee concluded that there is no evidence of direct adverse health effects from LEDs emission in normal use (lamps and displays) by the general healthy population. There is a low level of evidence that exposure to light in the late evening, including that from LED lighting and/or screens may have an impact on the circadian rhythm. At the moment, it is not yet clear if this disturbance of the circadian system leads to adverse health effects. [https://ec.europa.eu/health/sites/health/files/scientific\\_committees/scheer/docs/scheer\\_o\\_011.pdf](https://ec.europa.eu/health/sites/health/files/scientific_committees/scheer/docs/scheer_o_011.pdf)
- 14. *Nanoparticles Can Boost LED Lighting Efficiency by 50%*** - In an advance that could boost the efficiency of LED lighting by 50 percent and even pave the way for invisibility cloaking devices, a team of University of Michigan researchers has developed a new technique that peppers metallic nanoparticles into semiconductors. It's the first technique that can inexpensively grow metal nanoparticles both on and below the surface of semiconductors. The process adds virtually no cost during manufacturing and its improved efficiency could allow manufacturers to use fewer semiconductors in finished products, making them less expensive. <http://bizled.co.in/nanoparticles-can-boost-led-lighting-efficiency-by-50/>
- 15. *Change Catches Up with GE by Doug Chandler*** - The U.S. electrical industry has been buzzing with speculation about the direction of one of its foundational companies following announcements that General Electric is looking for a buyer for GE Lighting and that long-time chief executive Jeffrey Immelt will step down in August. Rumors have circulated for years that GE would part ways with another of the business lines on which it rose to be one of the most recognized brands in the world. Ever since the company divided its lighting business, gathering its consumer and legacy lighting at Nela Park in a group with electrical systems and appliances while moving its higher-end LED and connected lighting systems under Current, Powered by GE at the new Boston corporate headquarters, the industry has expected GE to divest lighting. When it sold off its iconic appliances business in 2016, the picture became clearer. <http://www.ewweb.com/business-management/change-catches-ge>



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- 16. *How Two Entrepreneurs Found An LED Lighting Niche And Built A Booming Business* by Jeff Kauflin** – Cole Zucker, 33, and his 35-year-old cofounder, Guillaume Vidal, are co-CEOs of Green Creative, a profitable lighting manufacturer with 70 employees and \$52 million in revenue. Their bulbs illuminate the aisles of many Walmart, Whole Foods and J. Crew stores. In a market dominated by Philips, GE and Osram Sylvania, Vidal and Zucker saw an opening when LED technology started to take off. They bet that the giant firms were ill-equipped to make the most of the rapidly evolving technology. "We used to worry about whether anyone would buy LED products," Zucker says. "Now we worry about how to maintain our breakneck growth rate." In the winter of 2010, Zucker moved to San Francisco to handle sales, while Vidal stayed in Shanghai to find a factory that could make the lights. <https://www.forbes.com/sites/jeffkauflin/2017/05/23/how-two-entrepreneurs-found-an-led-lighting-niche-and-built-a-booming-business/#c9cf85d58163>
- 17. *Luminaire-Integrated Controls* by Craig DiLouie** -The lighting controls revolution features three notable trends promoting integration of control with light. The latest commercial building energy codes promote complex control schemes. The LED source is highly controllable. And sensors and microprocessors have become miniaturized. Just as the luminaire has become a device integrating light source and fixture, a growing number of luminaires now also integrate sensors and controllers. In a typical traditional lighting system, hardware (luminaire), sensors (control inputs) and lighting controllers (microprocessors governing control operation) are installed separately. Sensors are connected to luminaires, and control inputs may be aggregated at a control panel featuring a controller. The ongoing miniaturization of sensors and controllers allows both to be embedded in luminaires, while volume manufacturing has reduced their cost. <http://lightingcontrolsassociation.org/2017/07/26/luminaire-integrated-controls/>
- 18. *Revised Standard on Solid-State Lighting Extends Chromaticity Range*** - In a revision of ANSI C78.377-2017 *American National Standard for Electric Lamps—Specifications for the Chromaticity of Solid-State Lighting Products*, the ANSI Accredited Standards Committee C78, Electric Lamps, establishes a range of chromaticity for general lighting with solid-state lighting (SSL) products to ensure that product chromaticity can be communicated to consumers. This revision extends the range of color points for general lighting with energy efficient SSL lighting products. It specifies chromaticity regions below the blackbody (Planckian) locus that are suitable for some lighting applications. Annex E Extended Specifications includes recent studies supporting the premise that light sources with chromaticity in the extended correlated color temperature categories are adequate for many applications. [http://www.techstreet.com/nema/standards/ansi-c78-377-2017?product\\_id=1986630](http://www.techstreet.com/nema/standards/ansi-c78-377-2017?product_id=1986630)

## Global LED EnergyWatch...

- 19. *ABB Acquires Communications Network Business*** - ABB announced it has agreed to acquire the mission-critical communication business of the Keymile Group to strengthen its communication networks portfolio. The acquisition will bring with it key products, software and service solutions, as well as research and development expertise. These will further enhance ABB's industry-leading digital offering, ABB Ability, by adding extremely reliable communications technologies that are essential to maintain today's dynamic and complex digital electrical grids. <https://www.tedmag.com/>



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**20. LEDvance Sees Immense Potential in China & Asia-Pacific Lighting Markets** - LEDvance, a global lighting provider based in Germany, is making all efforts to penetrate the China market with its digital and intelligent LED lighting products and lighting solutions. China the single biggest lighting market globally, and the entire Asia-Pacific region which is ever-growing, are important markets for LEDvance to target. LEDvance is investing in digital and intelligent LED products to meet the local demand in China. It is extending its product line from standardized and traditional light sources to advanced LED lamps and intelligent lighting products. Lawrence Lin, Executive General Manager at MLS Co., told ChinaDaily that LEDvance is set to become one of the top three lighting corporations within three years. LEDvance has emerged from the general lighting business of Osram. <http://bizled.co.in/ledvance-sees-immense-potential-in-china-asia-pacific-lighting-markets/>

**21. MLS Continued to Lead the Pack of Chinese Lighting LED Packagers** - In the China market, domestic manufacturers gradually became major suppliers of lighting LED sources. The table shown below discloses the top 10 Chinese companies with the biggest revenue market share. MLS's production bases in Xiaolan, Zhongshan and Ji'an, Jiangxi have been ramping up their capacity since 2016. Along with its competitive cost structure and additional market share expansion, the company stayed firmly ahead of other domestic LED packagers. The two plants will constantly beef up their production and another one in Yiwu, Zhejiang is also anticipated to come into operation soon, reflecting the light giant will keep scaling up. It should be noted that MLS (Forest Lighting in the USA) recently acquired Osram / Sylvania / LEDvance. <http://www.ledinside.com/>

Ranking	Top 10 for 2015	Top 10 for 2016	Change in Ranking
1	MLS	MLS	→
2	Honglitronic	Honglitronic	→
3	Lightning Opto	Lightning Opto	→
4	Refond	Refond	→
5	ChangFang Lighting	Shenzhen MTC	↑
6	Shenzhen MTC	NationStar	↑
7	Runlite	APT	↑
8	Mason	ChangFang Lighting	↓
9	NationStar	Runlite	↓
10	APT	Xindec	New

**22. Global LED Lighting Market Expected to Reach USD 54.28 Billion by 2022** - Growing at a CAGR of 13% between 2017 and 2022, the Zion Market Research report analyzes and estimates LED lighting market on a global and regional level. The report offers past data of 2016 along with estimation from 2017 to 2022 based on revenue (USD Billion). Assessment of market dynamics offers a brief thought about the drivers and restraints for the LED lighting market along with the impact they have on the demand over the forecast period. Additionally, the report includes the study of opportunities available in the LED lighting market on a global level. The regional segmentation comprises the current and forecast demand for the Middle East & Africa, North America, Europe, Latin America and Asia Pacific for LED lightings market.

<https://www.zionmarketresearch.com/report/led-lighting-market>



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- 23. Smart Lighting Market Predicted to Reach \$48.12 Billion by 2022** - A report from analyst Infoholic Research pegs the emergence of smart cities, demand for green buildings, government initiatives, awareness about energy efficiency and demand for IoT-based solutions as the key drivers that “will ensure a high growth trajectory for the smart commercial lighting market during the forecast period.” Market growth, however, may be restricted by high costs, cyber threat and lack of awareness among people. The market was segmented and studied by the following geographies: Americas, Europe, Asia-Pacific and Middle East and Africa. <https://www.ies.org/lda/smart-lighting-market-predicted-to-reach-48-12-billion-by-2022/>
- 24. Continental, Osram Plan Vehicle Lighting Joint Venture** - Osram wants to submit parts of its automotive lighting business to the joint venture while Continental will bring in electronic control systems, the weekly magazine said in an advance release to be published in its Friday edition. The joint venture will start early next year, employ about 1,500 workers and have both companies submit operations worth between 200 million euros (\$228.32 million) and 300 million euros of sales each to the new business, the magazine said. <https://www.reuters.com/article/us-continental-osram-idUSKBN19X2EI>
- 25. Helsinki’s Smart Street Lights Will Find You a Parking Place** - The city of Helsinki has installed internet-connected street lights which find motorists a parking place. The pilot deployment uses miniature Internet-Protocol video cameras mounted on the luminaires to monitor the spaces. These cameras generate data which is interpreted by cloud-based image analytics to assess if the parking space is available. Continuous tracking of parking spaces also helps identify parking bottlenecks and offers a means to enable traffic guidance. In the future, outdoor luminaires could provide light indications, making it easy to identify open parking places on city streets. The lighting industry sees huge potential in street lighting becoming the digital backbone of smart cities. <http://luxreview.com/article/2017/07/helsinki-s-iot-street-lights-will-find-you-a-parking-place>
- 26. CSIL Lighting Fixture Market Research Worldwide** - <https://www.lighting.csilmilano.com/> Founded in Milan (Italy) in 1980, the Centre for Industrial Studies (CSIL) is an independent research and consulting company specialised in applied economic research, evaluation of public investment projects, infrastructure project appraisal, support to development programmes and policies, MARKET analysis and SMEs economics. Latest research publications available on:
- <https://www.lighting.csilmilano.com/report/the-lighting-fixtures-market-the-united-states-0058484.html>
  - <https://www.lighting.csilmilano.com/report/the-european-market-lighting-fixtures-part-i-0058457.html>
  - <https://www.lighting.csilmilano.com/report/the-lighting-fixtures-market-china-0058542.html>
  - <https://www.lighting.csilmilano.com/report/the-lighting-fixtures-market-japan-south-korea-0078885.html>
  - <https://lighting.csilmilano.com/report/commerce-lighting-fixtures-sector-0058520.html>
  - <https://www.lighting.csilmilano.com/report/leds-and-the-worldwide-market-for-lighting-fixtures-0058638.html> (coming soon)
  - <https://www.lighting.csilmilano.com/report/the-lighting-fixtures-market-australia-0058570.html> (coming soon)



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## LED Technology Watch...

**27. New Lighting for Wimbledon** - Professional tennis evolves and so has the lighting and control system used for the game's premier tournament. The lighting was last retrofitted on Centre Court at Wimbledon when a retractable roof was installed in 2009. A second serve at the lighting took place this year, as the slow-start, high-energy HID lighting was replaced with LED fixtures, and upgraded to a Lutron Quantum Total Light Management system with Quantum Vue facility management software. As a result, Centre Court lighting is more responsive, can be turned on and off with no delay or warm-up time, and is flicker-free in real time as well as during slow-motion replay.



<https://www.ies.org/lda/new-lighting-for-wimbledon/>

**28. Eaton Introduces a High-Performing LED Retrofit Kit** - Engineered for quick installation, saving on labor costs and simplifying upgrades, the Metalux Cruze™ LED Retrofit Kit is an energy-efficient



solution featuring simple and quick installation for customers wanting to easily upgrade from fluorescent luminaires to LED technology without the need to install a new fixture. Saving on installation labor costs, the high-performing and aesthetically-styled LED system features the latest solid state lighting and driver technology for optimal performance, while providing energy savings of more than 50 percent compared to select fluorescent fixtures. Ideal for offices, healthcare, educational and retail applications, Eaton's LED retrofit kit utilizes the existing fluorescent luminaire's housing to save on the cost of purchasing a complete fixture, while also reducing material disposal cost in a retrofit project.

<http://www.cooperindustries.com/content/public/en/lighting/resources/LightingStories/Metalux-Cruze-LED-Retrofit-Kit.html>

**29. Light by Induction: the Finally Light Bulb Review** - The Finally light uses electromagnetism to induce an electric current within the bulb.

- **The Good:** The Finally Light Bulb offers a familiar design and a quality of light that complements skin tones better than most LEDs.
- **The Bad:** The Finally Light Bulb contains mercury, it won't dim, and it isn't as bright or efficient as much of the 60W replacement competition. Overall color quality was also much worse than the skin tones would have you believe.
- **The Bottom Line:** With a respectable but overstated quality of light, this bulb doesn't shine bright enough to impress. At \$10 per bulb (more, once you factor in shipping), it's a poor value compared to what you'll find in the lighting aisle.

<https://www.cnet.com/products/finally-light-bulb/review/>



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## National Energy Watch...

- 30. LIGHTFAIR® International 2018 Call for Speakers** - The LIGHTFAIR® International (LFI®) Conference, which offers hundreds of hours of education in a highly diverse curriculum, begins its run to opening day 2018 with the Call for Speakers launching on July 11, 2017. This global invitation calls for top professionals from a broad spectrum of industries to submit to speak at the world's largest annual architectural and commercial lighting trade show and conference in Chicago at McCormick Place May 6 – 10, 2018 (Pre-Conference LIGHTFAIR Institute®: May 6 – 7; Trade Show & Conference: May 8 – 10). For the 2018 LIGHTFAIR Conference, experts are invited to submit ideas to share expertise and experience within the following focus areas: Lifeforms, Environments, Influences and Practices. These topics may be addressed in the context of Inspiration, Applications, Research, Design and/or Tools & Technologies.  
<http://www.lightfair.com/lightfair/V40/index.cvn?id=10466#/.WW-kL7pFzi0>
- 31. What Is Amazon's Obsession with Electrical Supply? by Bridget McCrea** - A look at why the e-tailing giant is actively claiming market share in the electrical distribution space with its Amazon Business division. "If distribution can't provide significant and measurable value, it doesn't belong in the sales equation," wrote Chris Brown, CEO Wiedenbach-Brown, in tED magazine. "A simple answer to the question is to become invaluable to the manufacturer, the end user, or to both. And that answer is also a partial solution to the Amazon Business challenge, which is more dangerous to at least the commodity product aspect of distribution." Well, we're halfway through 2017 and it looks like Amazon Business' foray into electrical supply has gotten even more serious since Brown penned his article in 2015. The question is, what is this e-tailing behemoth's obsession with the industry and why is it putting time, effort, and money into conquering it? <https://www.tedmag.com/>
- 32. Cheryl English Assumes Presidency of the IES (2017-2018)** - Effective July 1, 2017, Cheryl English succeeds Shirley Coyle. Cheryl English has been a member of the IES for 35 years. She has worked for Acuity Brands in a number of positions including application design, testing, education and marketing, culminating in her current position as Vice President, Government and Industry Relations. On behalf of the IES, English helped develop the Joint IDA-IES Model Lighting Ordinance, the IES classification system for Outdoor Luminaires (TM-15) and the first series of IES ED education programs. She has served on a variety of IES committees and has been awarded the Distinguished Service Award, the Fellow Award, and an IES Presidential Award.  
<https://www.ies.org/pressroom/cheryl-english-assumes-presidency-of-the-ies-2017-2018/>
- 33. House Appropriations Committee Votes to Cut Energy Star by 40 Percent** - The House Appropriations Committee voted on July 18 to pass the Fiscal Year 2018 Interior and Environment Appropriations Bill, which provides \$31.4 billion to federal investments in natural resources. This budget is \$824 million less than 2017, and part of that cut is to 2018 Energy Star funding, which would drop to \$31 million, a reduction of 40 percent. The bill is \$4.3 billion more than the Trump administration's budget request. The administration had previously called for the complete defunding of the Energy Star program. <http://www.ecmag.com/section/green-building/house-appropriations-committee-votes-cut-energy-star-40-percent>



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## Monthly Special Feature...

### ***DC CURRENT MAKING A MAJOR COMEBACK, NATIONAL LIGHTING BUREAU EXPERTS SAY***

*Shepherdstown, WV* – Walk around just about any office in the United States and you’ll see dozens of power modules – point-of-use power transformers – plugged into conventional alternating-current (AC) electrical outlets, transforming the incoming AC to low-voltage direct current (DC), for use by telephones, tablets, laptops, and other electronic devices, including light-emitting-diode (LED), electric-illumination installations. Now, lighting-system manufacturers are heading forward to the past, bringing DC circuitry – called “power over ethernet” or PoE – to the office and other workplaces, so point-of-use power transformation will no longer be required. Two experts discussed PoE at the National Lighting Bureau’s Annual Lighting Forum during a session called “Illuminating the Future, Part One.” The two experts were:

- Lisa L. Isaacson (NuLEDs), and
- Michael S. “Mike” O’Boyle (Philips Lighting).

*EdisonReport* Editor and Publisher Randy Reid moderated the panel. The video is now available free from the National Lighting Bureau.

According to Isaacson and O’Boyle, PoE differs from conventional DC networks in that the cabling used can carry both power and communications signals, much as a smart phone that receives both power and communications signals when it is connected to a computer via a universal serial bus (USB) connector.

Being able to rely on one cable network for all connected devices permits connected devices to communicate with one another, evolving into an “Internet of things” (IoT) inside each building where the technology is used, and to communicate with other systems and other buildings, to as wide an area as desired. It also enables users to communicate with their lighting, using a smart phone and an app, to increase or decrease the amount of electrical illumination being provided, or to change the color of its output.

The panelists noted that PoE will not eliminate the need for conventional AC circuitry, but it will eliminate the need for AC power transformation when it comes to power for electronic devices. Both panelists also expressed confidence that PoE will likely be installed routinely in the near-term future, not only because of the versatility it provides, but also because it is safer to handle: Line-voltage AC can cause fatal accidents; low-voltage DC is much safer. PoE systems will also become less costly to install, Ms. Isaacson said, because less installation labor is involved. Right now, the cost to install a conventional system or a PoE system is about the same, because PoE’s installation-labor savings are offset by higher equipment costs. As more competitors enter the market, and as the equipment becomes more widely available, equipment prices will fall, so that wiring a building with both PoE and AC, where needed, will cost less than wiring a building with AC alone.

Watch “Illuminating the Future, Part One” free of charge at <https://nlb.org/lighting-forum-videos/>.



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