

# EnergyWatch



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*Love asks me no questions, and gives me endless support... William Shakespeare*

*A kiss is a lovely trick designed by nature to stop speech when words become superfluous.*  
*Ingrid Bergman*

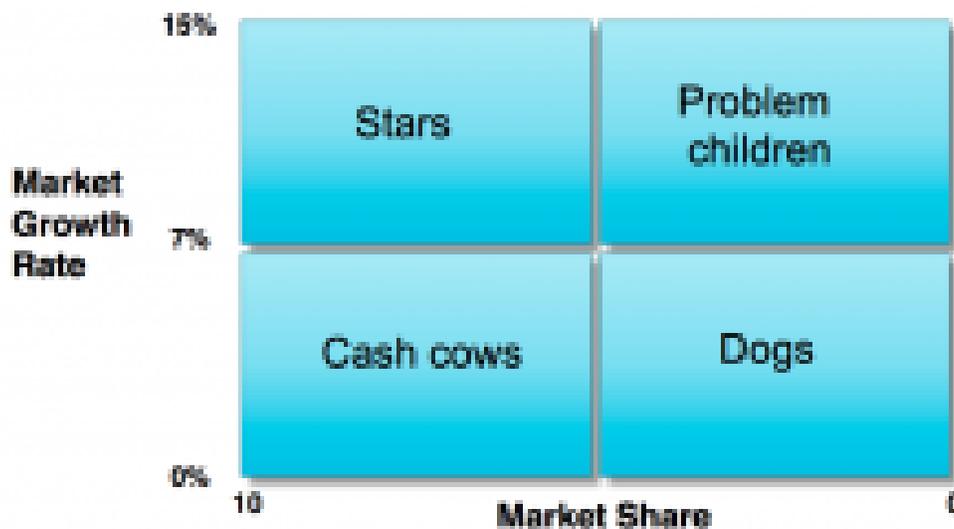
*Love does not consist in gazing at each other, but in looking together in the same direction.*  
*Antoine de Saint-Exupery*

*Love doesn't make the world go round, love is what makes the ride worthwhile. Elizabeth Browning*

*Love is that condition in which the happiness of another person is essential to your own.*  
*Robert A. Heinlein*

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**Something to Think About... WE DID CASH COWS, NOW LET'S DEFINE STARS / PROBLEM CHILDREN / DOGS**



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We defined Cash Cows in our last blog as follows: Cash Cows represent business units having superior market share in a mature, slow growing, fading industry. Cash cows require little investment and generate cash that can be utilized for investment in Star and Problem Child business units. As stated, 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 DOGS quadrant (no market / no share). Yes, DOGS, but as comedian Dom DeLuise always said: Sava fa da enda!

Stars – Stars represent business units having superior market share in a fast-growing industry, like the current Smart/Connected Lighting industry. I’m making a point here: the lighting industry is going thru a metamorphosis.....the traditional/legendary, incandescent / fluorescent / HID lighting industry is in the Cash Cow cell, heading for the DOGS. The Smart/Connected Lighting industry is heading into the Intelligent/Programmed Lighting industry and the successful players here are STARS! They are dominant leaders NOW! They generate cash as a result of their leading market share but because of this fast-growing market rate, Stars require ongoing and significant investments to maintain their market share lead. Strategic Business Units (SBUs) located in this cell are innovators, highly competitive, attractive to investors and are positioned to take advantage of the changes they envision, maybe a select few who see what no one else sees and act accordingly. Vision without action is a daydream; action without vision is a nightmare. As the lighting industry transitions, I really need your help because at this stage, I really do not know who should be in this quadrant. I have my suspicions and I’m sure some will claim to belong here but what do you think? Who do you think are the dominant market share leaders in the Smart/Connected Lighting industry NOW?

Problem Children (Question Marks) – Now we get to the Problem Child that keeps me up at night. Some call it Question Marks, either way, they are SBUs with low market share in a fast-growing market. They require substantial amounts of cash to keep up, to grow and to gain market share. They require special attention and innovative business actions to determine if the venture can be competitive and viable. A Problem Child has two options: (1) become a Star or (2) dominate a niche market. You want to be a Star, then you have many specific strategies which can be adopted..... expansion, retrenchment, repositioning, acquisitions, joint ventures, mergers, whatever? You know the game....the key is growing your market share. The niche marketing strategy speaks to being a Big Fish in a Small Pond: <http://energywatchnews.com/big-fish-in-small-pond-strategy-by-bill-attardi/> This strategy seems to work with high-tech companies who choose to dominate small niche markets. We have lived through the many lighting product evolutions before and the same players still dominated. What’s changed? Well, lighting is not just about illumination any more as the phone is not only a phone. SSL will replace every lighting system commercially available. Frost & Sullivan projects: LEDs 98 Percent of Lighting Market by 2025: <http://energywatchnews.com/leds-98-percent-lighting-market-2025/> Lighting is everywhere and Small Ponds are getting big, very big, and they have special needs, needs they don’t even know they need. Segmenting the segments makes a lot of sense because dominating heretofore smaller high potential ponds in the technological age leads to much greater opportunities than ever before. Inaction is not an option. One thing I know for certain is these decisions are hard and why top executives make the big bucks. Opinion: most of the new entrants are all Problem Children at this point during the transition process as well as the high-tech companies who are searching for a reason to be in the lighting business at all. You cannot tell the players without a score card and you certainly cannot predict who will gain market share or dominate a niche market..... or maybe you can.



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Dogs – My friend and cohort Chris Brown likes to say, “Some lighting businesses are out of business already, just don’t know it yet”. He’s talking about Dogs, businesses that can’t or won’t evolve themselves, innovate into true 21st Century businesses. They represent businesses having weak market shares in low-growth markets: the Traditional/Legendary Lighting market. They neither generate much cash nor require huge amounts of cash but due to their low market share and weak marketing practices, they will be the first to go. It’s never good to be mediocre in any business but in a mature traditional lighting industry, you could get away with it and survive and you did. In the Smart/Connected Lighting industry and certainly in the Intelligent/Programmed Lighting industry, you really cannot and must not be mediocre. For those who did survive, you have a choice, a second chance to be great: shape up, understand what’s happening and make the necessary changes in your business to compete at a high level this time, or look for work in some other industry. Stay traditional and the future in the lighting business is over for you. Not being harsh, just trying to make the choices as simple as possible.

We still teach the principles of the BCG Matrix and it applies here. It’s getting clearer that those in the Cash Cow or Dog quadrants are facing Illumigeddon. Thank you, Chris Brown, for the wake-up call. It’s not too early to know who the players are, even who the new high-tech new entrants are. As we move from Traditional/Legendary Lighting to Smart/Connected Lighting to Intelligent/Programmed Lighting, who will emerge as the innovators, who will make the necessary investments, who will reposition their business to adopt, who will expand and gain market share, who will dominate niche markets, who will become the future captains of our industry? Maybe you know.....

If you know, then tell us. Your comments are requested. We are where we are.....who do you think, <strong>right now</strong>, are the STARS and who are the PROBLEM CHILDREN? Don’t just sit there, ANSWER ME! Really, you know who all the players are, put them in either of these two BCG quadrants.....your participation and wisdom is much appreciated.

## LED Energy Watch...

1. **Facility Maintenance Decisions 3-Part Series on LED by John Lutz** - With the promise of longer performance lives and lower costs than traditional lighting systems, LEDs are an appealing option for applications throughout commercial and institutional facilities.
  - 1) **LEDs: Making Upgrades Work** - Expanding applications and appealing ROI make LED technology an increasingly popular choice for facilities.  
<http://www.facilitiesnet.com/lighting/article/LEDs-Making-Upgrades-Work--17302>
  - 2) **LEDs: Strategies to Reduce Energy Costs** - LED incentives can help organizations reduce energy costs and improve ROI. <http://www.facilitiesnet.com/lighting/article/LEDs-Strategies-to-Reduce-Energy-Costs--17321?source=part>
  - 3) **LEDs: Ensuring Bottom-Line Benefits** - Asking simple questions before an LED upgrade project begins can help ensure the costs and effort put into it can deliver the intended benefits.  
<http://www.facilitiesnet.com/lighting/article/LEDs-Ensuring-Bottom-Line-Benefits--17322?source=part>



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2. **REMINDER: DOE TM-30 Webinar on September 12** - IES TM-30-15, a system of measures and graphics that can be used together to effectively evaluate and communicate a light source's color rendering properties, has been around for two years, and in that time researchers have been helping to lay the foundation for its widespread use in the lighting industry. On Tuesday, September 12, DOE will host a webinar that will explore the new research and how it can help in applying TM-30, including studies relating TM-30 values to human evaluations, and the specification criteria that can be derived from the results. The future of TM-30 and color rendition measures will also be discussed. Presented by Michael Royer of Pacific Northwest National Laboratory, the webinar will be held on September 12 from 1:00-2:00 p.m. EDT. Register at: <https://register.gotowebinar.com/register/2809488988555195139>
3. **Bipartisan Legislation Introduced to Make 179D Tax Deduction Permanent** - Bipartisan legislation has been introduced in Congress that would make permanent a key energy efficiency tax incentive for owners and designers of energy efficient buildings while expanding its benefits to designers of hospitals, schools, tribal community facilities and other non-profits. Section 179D of H.R. 3507 <https://www.congress.gov/bill/115th-congress/house-bill/3507> allowed qualifying building owners and businesses to receive an up to \$1.80 per square foot tax deduction for their energy-efficient buildings placed into service during all open tax years. It was originally passed by Congress as part of the Energy Policy Act of 2005 and had been extended several times until it last expired at the end of 2016. <http://www.lightnowblog.com/>
4. **DOE Publishes GATEWAY Report on OLEDs in an Office Space** - DOE's GATEWAY program was invited to evaluate the new lighting system for the offices of the Rochester, NY, accounting firm of DeJoy, Knauf & Blood, LLP, one of whose founding partners, David DeJoy, is also co-founder and CEO of OLEDWorks, the only U.S.-based OLED manufacturer. The large number of different OLED and LED luminaires used in these offices makes the installation unique and well worth studying. A report on the project has just been published and is available online at: <https://energy.gov/eere/ssl/gateway-demonstration-indoor-projects>
5. **2017 Next Generation Lighting Systems (NGLS)** - The new NGLS features multiple competitions, a tighter focus on specific lighting applications, and an expanded evaluation process that involves installations in real-world settings and greater interaction among entrants, judges, and host sites. The response has been extremely positive, and the first competition is well underway. We'll be sharing regular updates throughout the multiphase evaluation process, highlighting key findings and lessons learned. The first NGLS competition focuses exclusively on connected lighting systems for interior applications. Seven systems have been accepted for initial evaluation. <http://www.ngldc.org/>
6. **Lumileds Celebrates Its Independence** - Lumileds, San Jose, CA, gathered hundreds of employees and customers earlier this week for an evening event to celebrate the company's history and its recent emergence as a stand-alone company. The company, which formerly comprised Royal Philips NV's automotive lighting, LED components and display lighting businesses, was spun off by Philips when it sold a majority stake to Apollo Global Management, LLC, New York, for about \$2 billion in a deal announced last December and completed in July. <http://www.ewweb.com/>



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7. ***Prepare for IoT - The Next Revolution in LED Lighting*** - By Mark Verheyen, Universal Lighting Technologies President and CEO. Perhaps the most striking thing about the LED revolution is the speed with which it has transformed our industry. A solid majority of our company's business is LED-related now, and it happened in a span of less than four years. This was a watershed moment because the lighting industry has traditionally been slow to change, with product cycles that typically lasted 20-30 years. Since the arrival of solid-state lighting (SSL), things are moving at a much faster pace, with 6-12-month product cycles. Indeed, the next revolution is approaching fast - harnessing the full potential of Internet of Things (IoT) technology. The companies that learned valuable lessons during the rapid proliferation of LEDs will be the ones best equipped to offer innovation, leadership, and education in the IoT revolution. <http://www.ledsmagazine.com/>
8. ***New IoT Platform from Acuity Brands Helps Evaluate and Plan Space Allocation Through Lighting*** - Acuity Brands introduced Atrius Spaces, an Internet of Things (IoT) platform service that helps customers manage space utilization using a building's occupancy data. Atrius Spaces, which includes a web application and an application programming interface (API), can be used to efficiently allocate and plan for spatial requirements, allowing building managers to optimize facility operations and budgets, as well as the overall management of a building or campus throughout its lifecycle. <http://www.acuitybrands.com/solutions/internet-of-things/atrius>
9. ***ASABE Publishes Metric Standard for LED Horticultural Lighting*** - The American Society of Agricultural and Biological Engineers (ASABE) has published the first in a series of three standards on horticultural lighting. The first standard focuses on definitions and descriptions of metrics. ASABE has published the ANSI/ASABE S640 standard "Quantities and Units of Electromagnetic Radiation for Plants (Photosynthetic Organisms)." LED lighting has proved beneficial to horticulture, for vertical farms as well as supplemental under-cover applications in greenhouses. The standards are meant to provide a common language for characterizing LED-based systems to grow plants. <http://bizled.co.in/asabe-publishes-metric-standard-for-led-horticultural-lighting/>
10. ***NEMA Files Legal Action That Could Stymie California Regulations on LED Lamps*** - The National Electrical Manufacturers Association (NEMA) has announced that it filed legal action seeking to preempt regulations established by the California Energy Commission (CEC) from taking effect. Parts of the CEC regulatory policy have come under attack from many in the solid-state lighting (SSL) industry, highlighted probably by rules that require 90-CRI light quality along with stringent efficacy levels. The NEMA action is broad and would stop the CEC from enforcing any regulatory action relative to general service lamps (GSLs) that is in conflict with policy under development at the federal level such as by the US Department of Energy (DOE). <http://www.ledsmagazine.com/>
11. ***TCP Launches New Website*** - "Whether you are a distributor, a lighting specifier, a project manager, or a resident who wants to understand their lighting options and technology better, our new user-friendly, easily searchable website helps you find what you need quickly," said Lesley Matt, Director of Marketing. There are many new features on the website, including a color temperature slider. Users can see all of the products in the color temperature of their choosing simply by dragging the color bar. Additional user-friendly features include application-based product selection, making it easier to find information quickly. <https://www.tcpi.com/>



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- 12. Bluetooth Mesh Networking and LEDs: What to Expect by John Curran** - Bluetooth SIG recently announced compatibility of the far-ranging standard with mesh networking. In the world of solid-state lighting, mesh networking and other ways of providing internet of things (IoT) capabilities has been an important push as more and more users seek integration. Mesh networking, as opposed to point-to-point networking, allows for self-healing systems. There is no central hub that can fail and drive the entire system offline. With the number of sensors, luminaires, access controls and other devices on a given office floor, let alone a major facility, this becomes critical and can reduce downtime and repair costs. <http://lightedmag.com/bluetooth-mesh-networking-and-leds-what-to-expect/>
- 13. Google Invests \$15 Million in University Spin-out Focused on Micro LED Technology** - Google Inc has invested \$15 million for a 13 percent stake in Glo, a university spin-out focused on creating nanowire-based LED-displays for mobile phones and smart watches as well as AR- and VR-applications. Glo, located in Silicon Valley and Lund, Sweden, has been commercializing its technology for creating direct view displays consisting of nanowire-based LEDs since 2008. Glo's display technology is an example of what the industry refers to as micro LED, giving better contrast and lower power consumption than LCD screens while yielding higher overall brightness than OLED. The last few years, both Apple and Facebook-owned Oculus have acquired start-up companies within the field of micro LED. <http://www.ledinside.com/>
- 14. Light Flicker 'Could Prevent Alzheimer's'** - The study, by the Massachusetts Institute of Technology, challenges accepted wisdom in the lighting industry that flicker is neurologically problematic and holds out the prospect that artificial light could be tuned to play a preventative role in degenerative diseases. The team of researchers, led by Dr. Li-Huei Tsai, flashed a strobe light near rodents that had brain damage similar to that of Alzheimer's patients. When the mice were exposed to the light for an hour, protective cells in their brains swallowed up toxic proteins that are correlated with the disease. Dr. Tsai's study involved using a light that flashes 40 times per second. That's a slower flicker than standard mains-electricity flicker which is between 100 and 120 Hertz. It's barely perceptible, yet appears to have dramatic effects. An hour of exposure resulted in a reduction in beta amyloid – the main constituent of the plaques which clog brain cells and cause Alzheimer's – for up to 24 hours in the parts of the brain responsible for memory and vision. The outcome was more dramatic when the therapy was conducted every day for seven days. It's believed that the light works by stimulating an immune cell response. Microglia are the primary immune defense cells in the central nervous system. They seek out and destroy plaques, damaged brain cells, and infectious agents. <http://luxreview.com/>
- 15. Osram Acquires IoT Specialist Digital Lumens** - Osram has agreed to acquire Digital Lumens Inc., a U.S. company based in Boston, Massachusetts that specializes in industrial IoT solutions. Founded in 2008, Digital Lumens employs 65 people and in the last fiscal year generated sales in the mid-double-digit millions (USD). The Digital Lumens software platform can be used to run applications covering everything from intelligent lighting control, energy use, and security systems to the measurement of environmental parameters such as air quality. The cloud-based platform is compatible with components and hardware of other manufacturers. Digital Lumens has built a strong customer base for industrial IoT solutions, with more than 2,500 installations. [http://www.ledinside.com/news/2017/8/osram\\_acquires\\_iot\\_specialist\\_digital\\_lumens](http://www.ledinside.com/news/2017/8/osram_acquires_iot_specialist_digital_lumens)



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## Global LED EnergyWatch...

- 17. Global LED Lighting Module Market to Grow at CAGR 20% by 2021** – According to Technavio market research analysts. Technavio hardware and semiconductor analysts highlight the following three market drivers that are contributing to the growth of the global LED lighting module market:
- Government support and incentives for LED lighting
  - Demand for energy-efficient lighting solutions
  - Minamata Convention on Mercury The Minamata Convention on Mercury is an international treaty signed by delegates from 128 countries in 2013. It seeks to reduce emissions of mercury and mercury compounds.
- <http://bizled.co.in/led-lighting-module-market-to-grow-at-cagr-20-by-2021/>
- 18. COB LED Market to Reach US\$ 9.2 Billion by 2020** - Increasing urbanization and infrastructure spending are expected to be the key drivers for market growth over the forecast period. Global chip on board (COB) LEDs are energy efficient, have greater reliability and require less space. Furthermore, they offer high intensity and homogenous luminosity, which makes them suitable for high power applications. Companies operating in the market include Philips LumiLEDs Lighting Company, Cree Inc., Samsung Electronics Co. Ltd., Citizen Electronics Co. Ltd., Osram Opto Semiconductors GmbH, Everlight Electronics Co.Ltd., Seoul Semiconductor Co. Ltd., Nichia Corporation, Lumens Co. Ltd, LG Innotek Co. Ltd., <http://bizled.co.in/>
- 19. LED Filament Lamp Market Demand Likely to Hit 300 Million Units in 2017** - According to a report from LEDinside, stage lighting and filament lamp market grows significantly due to good market demand. In 2016, global LED filament lamp market demand was 150 million units. In 2017, the market demand is likely to hit 300 million units, up by 100% year on year. That's \$745 million in 2017 from \$655 million in 2016. The report estimates that LEDvance and Philips Lighting are the top two filament lamp branding vendor. Moreover, filament OEM supply majorly comes from Chinese manufacturers. <http://www.ledinside.com/>
- 20. Industrial Lighting Market by Light Source (LED, HID, Fluorescent)** - The industrial lighting market was valued at USD 7.59 Billion in 2016 and is expected to be worth USD 13.17 Billion by 2023, growing at a CAGR of 7.82% between 2017 and 2023. The objective of this report is to define, describe, and forecast the market size and growth potential of the industrial lighting market across different segments such as light source, offering, installation type, product, application, and geography. This report includes the forecast of the market size, in terms of value, with respect to four main regions North America, Europe, Asia Pacific (APAC), and Rest of the World (RoW). The study identifies and analyzes the market dynamics such as drivers, restraints, opportunities, and industry-specific challenges for the market. It also profiles the key players operating in the industrial lighting market. <http://www.marketsandmarkets.com/Market-Reports/industrial-lighting-market-123080765.html>
- 21. OSRAM Opto Semiconductor Acquires AIXTRON's MOCVD Systems** -AIXTRON Planetary technology supports production ramp-up to meet current market demand for 150 mm IR high-power lasers and LEDs. AIXTRON announced that OSRAM Opto Semiconductors has purchased the company's AIX 2800G4-TM Planetary system for the manufacturing of mainly infrared-based high power lasers and LEDs based on gallium arsenide (GaAs). <http://www.ledinside.com/>



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- 22. *PI-SCALE Creates Pilot Line to Commercialize Flexible OLED Lighting*** - Europe's technology leaders in the development of flexible OLEDs for lighting and signage applications have joined together in a consortium to develop an open access pilot line that will accelerate the commercial adoption of this promising new technology. The project titled 'PI-SCALE' aims to create a European-wide pilot line which will enable companies of all sizes to quickly and cost effectively test and scale up their flexible OLED lighting concepts and turn them into market ready products. Flexible OLEDs have the potential to be integrated into formed parts or seamlessly bonded onto curved surfaces, and the commercialization of this technology will open up a host of exciting design opportunities to create new value adding lighting products in many different application areas, such as architecture, automotive, aerospace and consumer electronics. The technology allows for ultra-thin (<0.2 mm), highly bendable, very lightweight, and even transparent, energy efficient lighting solutions that can be made or cut to any shape or size. <http://bizled.co.in/pi-scale-creates-pilot-line-to-commercialise-flexible-oled-lighting/>
- 23. *London Connects 28,000 Streetlights to IoT*** - London's financial district, known as the City of London (12,000), as well as the Borough of Barking and Dagenham (15,500) in the city's northeast, will now control street lights remotely using so-called Internet of Things protocol. The lights could eventually become part of an IoT scheme in which they help collect information on things like traffic, parking, noise, and air quality. The mesh topology treats street lights as nodes in a network, allowing lights to relay information to each other and thus ease the process of remote switching and dimming. It also helps to monitor the performance of each light, cutting down on maintenance costs. The Starfish mesh is supplied by Californian technology firm Silver Spring Networks. <http://luxreview.com/article/2017/08/london-installs-28-000-iot-streetlights>
- 24. *Laser Lighting Trial Starting in China*** - For perhaps the first time in the world, trials taking place in China next month will use lasers for street lighting, an innovation aimed at saving energy and eliminating the cost of expensive cabling infrastructure. David Ho and the Jinjing Co. have developed the new lighting technology in the city of Fuzhou in China's southeastern Fujian Province. Trials will start next month in the nearby city of Fuqing. The technology uses laser beams of blue light to transmit energy across large distances without power lines. The beams strike devices that use quantum-induced materials to transform the laser energy into light for illumination. While automakers such as Mercedes-Benz and BMW are already using a similar technology for car headlights, the trial in China is aimed at developing applications for street and highway lighting as well as environments not readily accessible to a power grid. [http://www.eetimes.com/document.asp?doc\\_id=1332182](http://www.eetimes.com/document.asp?doc_id=1332182)
- 25. *Philips Lighting's Enabled Licensing Program Signs 100 New Licensees to Reach 800 Members***  
The 100 new members, which represent small- and medium-sized businesses as well as large multinationals, come from all around the world. A significant number of the new licensees are manufacturers of retrofit bulbs or private label retailers. In addition to these mainstream markets, new members are also active in a wide range of niche markets including automotive auxiliary lighting, aquarium lighting and ceiling fans. Since 2008, Enabled has encouraged innovation and fostered growth in the LED lighting market. [http://www.lighting.philips.com/content/B2B\\_LI/en\\_AA/ip/licensing/led-based-luminaires-and-retrofit-bulbs.html](http://www.lighting.philips.com/content/B2B_LI/en_AA/ip/licensing/led-based-luminaires-and-retrofit-bulbs.html)



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## LED Technology Watch...

**26. *Electrical Wholesaling's Top 10 LED Picks for July*** - Congratulations to the product development teams from Nora Lighting, US Architectural Lighting, Soraa, MaxLite, Lind Equipment, Acclaim Lighting, Foreverlamp, Litetronics, Architectural Area Lighting/Hubbell Lighting and TE Connectivity. If you have a new product that you would like considered for our monthly Top 10 LED Product Picks, please send a press release and high-resolution image (300 dpi or better) to Jim Lucy, Electrical Wholesaling's chief editor at [jim.lucy@penton.com](mailto:jim.lucy@penton.com)

**27. *Legrand Lighting Control Systems Now Compatible with Voice Control-Enabled Devices*** - Building on its commitment to enhancing the delivery and control of power and light, Legrand introduces Voice Control compatibility with its radiant® Collection RF (radio frequency) and adorne® Collection Wi-Fi Lighting System. This new functionality enables Legrand customers to control their lights via Amazon's Echo and Dot devices or Google Home. Homeowners that have both Legrand smart lighting systems and Voice Control-enabled devices from Google or Amazon can now power and dim lights simply by saying phrases like, "Ok Google, turn on the porch lights," or "Alexa, dim the living room to 50%" without needing to reach for a phone, tablet, or light switch. <http://www.ledinside.com/>

**28. *New ENERGY STAR® Certified USHIO 95+ CRI Uphoria Edge LED MR16 with High R9 Value***



Available in 7W, these ENERGY STAR® certified LED MR16s offer an energy saving alternative while providing excellent color rendering with a high R9 value showing more vibrant reds. With the form, fit and function of traditional halogen MR16 lamps, these dimmable LEDs are lightweight with a smooth reflector design and provide 86% savings on energy costs. The COB design mimics panel lighting providing crisper, cleaner shadows. These premium LED MR16 lamps are damp location rated and UL 1993 rated for totally enclosed fixtures. All Uphoria Edge LED MR16 (95+ CRI) lamps operate on 12V, and are now available in Spot, Narrow Flood and Flood beam angles in Soft White (2700K) and Warm White (3000K) color temperature. [www.USHIO.com](http://www.USHIO.com)

**29. *Installation: InstantFit LED Lamps w/ EasySmart & Lumina RF Wireless Controls*** - Convert to LED and retrofit spaces with multi-zone controls using Philips EasySmart lamps and Leviton Lumina RF wireless controls. Easy installation steps include simply replacing lamps in existing fixtures, replacing the wall switch and configuring the system with the Leviton Neuron App for multi-zone dimming, scene control and manual control. More at: [www.leviton.com/philipseasysmart](http://www.leviton.com/philipseasysmart) From a single room to an entire building, retrofit LED lighting projects with advanced wireless controls just got faster and easier. <https://www.youtube.com/watch?v=M4NF0uuQ310>



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## National Energy Watch...

- 30. Free Whitepaper: 2017 Wholesale Distribution Economic Trends** - This whitepaper gives a high-level view of the revenues of wholesale distributors in 2016 and gives a look at the economy's impact on the industry. Deflation drove down the real value of production in 13 of the 19 major wholesale distribution sectors in 2016. The economy and the wholesale distribution industry appear to be turning a corner for 2017, however. Positive outlooks for employment, wages and corporate investment are expected to boost U.S. economic growth overall. All 19 major wholesale distribution sectors are expected to post actual (not adjusted for inflation) revenue growth in 2017 and 2018. <https://www.mdm.com/>
- 31. Federal Pre-emption as a Barrier to Cost Savings and High Performance Buildings in Local Energy Codes** - This white paper from New Buildings Institute (NBI) looks at the impacts of federal rules on efficiency standards for appliances, water heating and HVAC equipment and lays out possible solutions from an examination of policies from around the world. Decades-old federal laws that set national efficiency standards for various equipment also preempt states and cities from setting their own more stringent standards. Today however, federal preemption is a major barrier for cities and states to set efficiency stringency through local energy codes and is even driving up the incremental cost of efficiency. <https://newbuildings.org/resource/federal-preemption-barrier-to-cost-savings/>
- 32. EC&M's 2017 Top 20 Electrical Contractors** - Every September, *EC&M* unveils the highly anticipated Top 50 electrical contractors list, ranked specifically by electrical and datacom revenue. Reaching the highest number in years — with a combined total of \$23.8 billion in 2016 — this year's Top 50 players continue to top the previous year's performance. This photo gallery offers a sneak peek at the companies making it into the Top 20 spots, based on 2016 electrical sales data. Here's the Top10: <http://www.ecmweb.com/construction/ecms-2017-top-20-electrical-contractors>
- No. 1 — Quanta Services, Houston, TX \$4.9 billion
  - No. 2 — Rosendin Electric, San Jose, CA \$1.96 billion
  - No. 3 — EMCOR Group, Inc., Norwalk, CN \$1.71 billion
  - No. 4 — MYR Group, Inc., Rolling Meadows, IL \$1.14 billion
  - No. 5 — Henkels & McCoy, Inc., Blue Bell, PA \$954.7 million
  - No. 6 — Cupertino Electric, Inc., \$ San Jose, CA \$714.7 million
  - No. 7 — MMR Group, Inc., Rouge, LA \$695 million Baton
  - No. 8 — M.C. Dean, Inc., Tysons, VA \$643.6 million
  - No. 9 — Five Star Electric Corp., Ozone Park, NY \$565 million
  - No. 10 — Helix Electric, San Diego, CA \$524.7 million
- 33. Special Recognition to No. 14 — Facility Solutions Group, Inc. Austin, Texas \$444.1 million** - Founded in 1986, FSG Electric (FSGE) is a full-service contractor, providing electrical service, project management, electrical engineering, and electrical construction for general contractors, design-build firms, national retail accounts, facility managers, and building owners. Company services also include data cabling, thermography, aerial lighting service and rappelling. FSGE offers 24-hour emergency service. Additionally, FSGE's energy audits and lighting retrofits help customers identify lost profit due to inefficient electrical systems, adding directly to the customer's bottom line. [www.fsgi.com](http://www.fsgi.com)



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- 34. Home Depot to Install 30,000 PV Panels from Current Powered by GE** - The Home Depot has selected Current, powered by GE to support the expansion of its rooftop solar energy program. Current partnered with Home Depot on site selection, project implementation plans, financing and incentive capture for 20 solar installations in New Jersey, as well as 10 additional stores in Connecticut, Maryland and Washington, DC. The 11.9 MW portfolio will deploy approximately 30,000 rooftop solar panels and reduce electricity grid demand by an estimated 30 to 35 percent annually at each Home Depot store. <http://www.ewweb.com/>
- 35. GE, ABB Restart Talks Over Industrial Solutions Deal** - GE is entertaining the possibility of selling its industrial solutions business for a little over \$2 billion after initially hoping for more than \$3 billion, four sources said this week. The talks with ABB (Swiss engineering company) had ended last month over price disagreements. GE's industrial solutions business offers circuit breakers, relays, panel boards and other industrial electrical equipment for several markets, including the healthcare, mining, renewable energy, telecommunication, construction and data center sectors. <https://www.reuters.com/article/us-ge-divestiture-abb-idUSKCN1B32NR>
- 36. Plan to Light New York City Bridges Faces Opposition** - Critics are throwing shade at Gov. Andrew Cuomo's pricey plan to install high-tech, color-changing lights on New York City's bridges, questioning whether the investment is the best use of public money. A government watchdog group this month called for a state probe into what it says are conflicting explanations for how much the lights cost and where that money will come from. Estimates have ranged from \$216 million to \$350 million. Cuomo has repeatedly talked up the lights, envisioning them as an "international tourist attraction" that would add a "breathtaking" touch to the city's already iconic skyline. 8/14 AP
- 37. Changes Coming to the Michigan Energy Code** - Significant changes are underway for commercial buildings with the 2015 Michigan Energy Code taking effect on September 20, 2017. This is the state's first commercial energy efficiency code update in more than six years. The new code introduces significant lighting control provision changes, which can be both confusing and daunting. For example, there is no longer an option to pick from the ASHRAE 90.1 – 2007 or IECC 2009 standards. Michigan will now follow one single standard for lighting and lighting controls. The 2015 Michigan Energy Code for commercial buildings largely follows ASHRAE 90.1-2013 with a few exceptions. According to Legrand, <https://www.legrand.us/wattstopper/government/energy-codes-and-efficiency.aspx> the result of these changes will mean significant leaps in energy efficiency and reduction in energy consumption and costs for Michigan. <http://www.ecmweb.com/energy-management/changes-coming-michigan-energy-code>
- 38. Albuquerque, NM Streetlights to Go LED** - Old streetlights will be replaced under a 15-year deal with Citelum, which has worked on similar projects in cities including Paris and Copenhagen. Citelum has spent the last 12 months developing a "lighting masterplan" for Albuquerque, beginning with an inventory of all its streetlights. It will now upgrade 20,000 of the city's 32,600 lights to LED versions, and will maintain them for the next 15 years. The upgrade will be paid for from savings on energy and maintenance bills, and will see the city cut its carbon emissions by more than 123,000 tonnes over the 15 years of the project. <http://luxreview.com/article/2017/08/albuquerque-streetlights-to-go-led>



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### Monthly Feature... *LED Lamps & Fixtures Shipped -*

	2011	2012	2013	2014	2015	2016
<b>LAMPS</b>						
<b>LED "A" LAMPS</b>	12%	10%	30%	38%	42%	47%
Units (000s)	820	3,000	12,700	51,000	180,000	370,000
Dollars (000s)	\$17,000	\$30,500	\$172,000	\$411,000	\$685,000	\$910,000
AUP	\$20.73	\$10.17	\$13.54	\$8.06	\$3.81	\$2.46
<b>LED R &amp; PAR</b>	71%	70%	51%	36%	25%	20%
Units (000s)	3,000	8,000	13,650	25,000	50,000	65,000
Dollars (000s)	\$100,000	\$225,000	\$296,000	\$385,000	\$420,000	\$390,000
AUP	\$33.33	\$28.13	\$21.68	\$15.40	\$8.40	\$6.00
<b>LED (Decorative and all other)</b>	17%	18%	14%	11%	19%	17%
Units (000s)	1,200	4,350	9,000	14,000	30,000	38,000
Dollars (000s)	\$23,000	\$58,000	\$80,000	\$115,000	\$306,000	\$330,000
AUP	\$19.17	\$13.33	\$8.89	\$8.21	\$10.20	\$8.68
<b>TLED</b>	0%	2%	5%	7%	14%	17%
Units (000s)	-	150	1,000	4,000	17,000	40,000
Dollars (000s)	\$0	\$7,000	\$30,000	\$70,000	\$225,000	\$325,000
AUP	\$0.00	\$46.67	\$30.00	\$17.50	\$13.24	\$8.13
<b>TOTAL (000)</b>	<b>\$140,000</b>	<b>\$320,500</b>	<b>\$578,000</b>	<b>\$1,074,500</b>	<b>\$1,650,000</b>	<b>\$1,955,000</b>
<b>FIXTURES</b>						
<b>OUTDOOR</b>						
Total Outdoor Market (m)	\$2,295	\$2,590	\$2,975	\$3,700	\$4,628	\$5,088
LED OUTDOOR %	21%	25%	29%	35%	44%	46%
LED Dollars (m)	\$475	\$650	\$875	\$1,300	\$2,028	\$2,338
<b>INDOOR</b>						
Total Indoor Market (m)	\$5,625	\$5,800	\$6,300	\$7,700	\$9,750	\$10,875
LED INDOOR %	8%	12%	16%	26%	33%	40%
LED Dollars (m)	\$475	\$675	\$1,000	\$2,000	\$3,250	\$4,400
<b>TOTAL (000)</b>	<b>\$7,920,000</b>	<b>\$8,390,000</b>	<b>\$9,275,000</b>	<b>\$11,400,000</b>	<b>\$14,378,000</b>	<b>\$15,963,000</b>
Ballast Market Dollars (m)	\$1,010	\$975	\$870	\$740	\$600	\$480
LED Systems Market Dollars	\$200	\$400	\$650	\$900	\$1,100	\$1,350
Total Ballasts / LED Systems	<b>\$1,210</b>	<b>\$1,375</b>	<b>\$1,520</b>	<b>\$1,640</b>	<b>\$1,700</b>	<b>\$1,830</b>



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