IMPACTS OF LATEST UPDATES TO ENERGY STAR®
TITLE 24 & TITLE 20 ON LIGHT SOURCES & LUMINAIRES
MAXLITE WEBINARS:

IMPACTS OF LATEST UPDATES TO ENERGY STAR®
TITLE 24 & TITLE 20 ON LIGHT SOURCES & LUMINAIRES

Presented by: Chris Primous - VP of National Accts and Industry Relations, MaxLite

- ENERGY STAR® Luminaires and Lamps V2.0
  - Overview of program changes
  - Impact on Light Sources
  - Impact on Luminaires

- California Title 24 2016 building efficiency standard
  - What is Title 24?
  - Overview of program changes
  - Impact on Luminaires, Sources, and Applications

- California Title 20 appliance efficiency regulations
  - What is Title 20?
  - Overview of program changes
  - Impact on Luminaires and Light Sources
A NOTE ON TERMINOLOGY:

Lamps
“Bulbs”

Luminaires
Light Fixtures

Portable Luminaires
Table Lamps or Desk Lamps, typically with cord/plug
ENERGY STAR® UPDATES - LAMPS

ENERGY STAR Lamps V2.0

- The latest ENERGY STAR® Lamps specification (Version 2.0) was released on December 31, 2015 and became effective Jan. 2, 2017
- Reduced lifetime requirement on most omnidirectional LED lamps from 25,000hrs to 15,000hrs
- Omnidirectional lamp efficacy needs to be at least 80lpw (if CRI less than 90) or 70lpw (if CRI>=90).
- This means that the vast majority of CFLs will no longer be able to be ENERGY STAR® certified starting in 2017 (many CFLs used today are approx. 65-70lpw)
Impact on LAMPS

- No more CFLs
  - ES Lamps program was started primarily to advance adoption of compact fluorescent lamps (CFLs)
  - Due to efficacy requirements of 80 lm/w on most lamps, almost all CFLs are now eliminated from the program
  - LED lamps will be primary certified products

**Note:** Lamps certified to a previous version are allowed to sell through stock, but they were no longer allowed to be manufactured after Jan. 2, 2017 unless they meet current specifications.
IMPACTS OF ENERGY STAR® LAMPS UPDATE

Impact on LAMPS
- LED Filament lamps can now be certified
  - Includes warmer CCTs such as 2200K
  - Requires full 6,000 hours (8.5 months) of life testing
- Note other traditional LED lamps can certify early and be introduced to the market after 3,000 hrs of life testing
ENERGY STAR® Luminaires V2.0

- The latest version of the ENERGY STAR Luminaires specification (Version 2.0) was released on May 29, 2015, and became effective June 1, 2016.
- Fixtures certified to previous versions had to be recertified to V2.0 after June 1, 2016.
- **Luminaires now can be certified with a E26 socket**
- If an E26 socket is used, an ENERGY STAR certified E26 lamp must be included in the fixture.
- Now luminaires can be certified if they include ANY certified lamp.
Impact on Luminaires

• Fixtures that were previously supplied with GU24 CFLS now are likely going to be supplied with certified LED lamps or integral LED light engines.
Impact on Light Sources

- LED Light Engines can now be certified to the Certified Subcomponent Database (CSD)
- Allows easier ENERGY STAR certification of fixture using engines
- Lamps featuring non-traditional ANSI envelopes and shapes, GU24 base, can now be listed on the CSD
- Lamps that do not have the familiar A, BR, B, T, etc envelope shapes can be on CSD, not ES Certified
What is California Title 24?

Title 24 is California’s building energy efficiency standards. It is required to be met for any building that requires a permit.

Lighting installations in all newly constructed buildings and additions and alterations of existing buildings must meet applicable Title 24 requirements in order to receive a permit. Compliance is verified by building inspectors.

Title 24 is updated every 3 years by the California Energy Commission (CEC), current applicable version is T24 2016. T24 2019 is currently under development.

On June 10, 2015 CEC voted to approve significant changes to California T24 2016 that became effective January 1, 2017.
What California Title 24 is NOT:

- It is not a product certification
  - It is a building code, applicable to all buildings permitted in the state
  - Products can be used to meet the code, but there is no such thing as a T24 compliant product
- It is not Title 20, which is an appliance regulation required to be met for products sold in the state (T20 includes portable lamps and in 2018 will include many LED lamps)
  - T24 does NOT regulate product sold in the state
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TITLE 24 UPDATES
SIGNIFICANT CHANGES IN TITLE 24 2016 (EFFECTIVE JAN. 1, 2017)

• All lighting installed in residential construction must be “high efficacy”
  • No longer any allowance of low efficacy luminaires (such as incandescent)
• The definition of “High Efficacy” has been significantly expanded
• Luminaires no longer need to include GU24 Sockets
  • E26 Sockets are allowed IF the luminaire includes a JA8 compliant lamp
• All luminaires must include a compliant light source
  • At the time of inspection
  • Lamps do not need to be included in the packaging with the fixture
• Light sources must be appropriately marked “JA8-2016” or “JA8-2016-E” (elevated temp/enclosed rated)
Recessed downlights and enclosed luminaires are required to contain a JA8 compliant light source that meets elevated temp requirements

- Marked “JA8-2016-E”
- Note: Downlights cannot include screw base sockets
  - Downlights must also be IC/AT rated
- Builder must provide homeowner with luminaire schedule that includes lamps installed in luminaires
• Note: Most changes in T24 2016 affect RESIDENTIAL lighting and dwellings
  • Non-Residential lighting standards remain mostly the same as T24 2013
• Note that residential lighting requirements also apply to:
  • Single Family Buildings, indoor and outdoor lighting
  • High Rise multifamily residential units
  • Hotel and motel guest rooms
  • Fire station dwellings
  • Dormitory and senior housing dwellings
  • Sheds and garages on residential sites
• The Residential Lighting energy standards apply to only **permanently installed luminaires**
  • Does not apply to portable luminaires such as table lamps or freestanding floor lamps

**Permanently Installed Luminaires:**

Lighting that is...

• Attached to walls, ceilings and columns
• Attached to top or bottom of permanently installed cabinets
• Inside permanently installed cabinets
• Attached to ceiling fans
• Integral to exhaust fans
• Integral to garage door openers
• Part of track lighting and flexible lighting systems

*Important Note:* Permanently installed luminaires may have either plug-in or hardwired connection. A portable luminaire (contains a cord/plug) that is attached or mounted as described above, will be subject to T24 regulations.
The new definition of **High Efficacy**:
- Inspectors are looking for 100% high efficacy lighting in buildings
- To be deemed high efficacy for Title 24 2016:

<table>
<thead>
<tr>
<th>Light Efficacy Lighting</th>
<th>Light sources in this column shall be certified to the commission as High Efficacy Light Sources and marked as meeting JAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light sources in this column are automatically classified as high efficacy and are not required to be JA8 compliant</td>
<td></td>
</tr>
<tr>
<td>1. Pin-based linear fluorescent or CFL light sources using electronic ballasts.</td>
<td>8. All light sources in ceiling recessed downlights.</td>
</tr>
<tr>
<td>2. Pulse-start metal halide.</td>
<td>9. GU24 sockets containing LED light sources</td>
</tr>
<tr>
<td>3. High pressure sodium.</td>
<td>10. Any light source not otherwise listed in this table and certified to the commission as complying with Joint Appendix 8</td>
</tr>
<tr>
<td>4. GU24 sockets containing light sources other than LEDs (such as CFL).</td>
<td></td>
</tr>
<tr>
<td>5. Luminaires with hardwired high freq generator and induction lamp.</td>
<td></td>
</tr>
<tr>
<td>6. Inseparable SSL Luminaires that are installed outdoors</td>
<td></td>
</tr>
<tr>
<td>7. Inseparable SSL luminaires containing colored light sources that are installed to provide decorative lighting.</td>
<td></td>
</tr>
</tbody>
</table>
What is JA8?

- The primary Title 24 2016 Building Efficiency Standards documentation is approximately 289 pages.
  - There is an accompanying separate Reference Appendices document of 500+ pages.
  - It contains residential appendices (RAx), non-res (N Ax), and the joint appendices (J Ax).
- Joint Appendix 8 (JA8) of the Reference Appendices provides all of the qualification requirements for high efficacy light sources installed to comply with section 150.0(k) of the standards.
- All qualifying light sources must be certified to the state of California and registered on the California Energy Commission (CEC) database.
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TITLE 24 UPDATES: JA8 REQUIREMENTS

• Joint Appendix 8 of the Title 24 Building Efficiency Standards

Summary of major requirements:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Requirement Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficacy</td>
<td>&gt;= 45 lpw</td>
</tr>
<tr>
<td>Power Factor</td>
<td>&gt;= 0.9 PF</td>
</tr>
<tr>
<td>Color Rendering</td>
<td>&gt;= 90 CRI + R9&gt;=50</td>
</tr>
<tr>
<td>CCT</td>
<td>&lt;= 4000K (engines), &lt;= 3000K (lamps)</td>
</tr>
<tr>
<td>Flicker</td>
<td>&lt; 30% for freq less than 200Hz at 100% and 20% of light output (Tested per JA10)</td>
</tr>
<tr>
<td>Dimming</td>
<td>&lt;= 10%</td>
</tr>
<tr>
<td>Testing</td>
<td>ENERGY STAR Elevated Temperature Life test required for all Omni Lamps (&gt;=10W) and engines that are NOT labeled “not for use in enclosed fixtures” or “not for use in recessed fixtures”</td>
</tr>
<tr>
<td>Labeling</td>
<td>“JA8-2016” or “JA8-2016-E” (elevated temp test/enclosed). Exceptions for engines/lamps with dia. less than 1.0” and decorative lamps with dia. less than 2.0”</td>
</tr>
</tbody>
</table>
• Test method for flicker requirements in T24 2016 are described in Joint Appendix 10 (JA10)

• All qualifying light sources are required to complete the testing as described and meet <30% flicker for frequencies of 200Hz or below, at 100% and 20% light output

• Test must be performed at a lab accredited by NVLAP or accreditation body operating in accordance with ISO/IEC 17011
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TITLE 24 UPDATES: T24 2016 IMPACT ON LUMINAIRES

• Manufacturers of luminaires for new construction need to make sure JA8 compliant lamps are available for the socketed fixtures that are sold for new construction
  • Example: If you are a manufacturer of a luminaire that includes a G9, E12 candelabra, GU5.3, GU10, or other socket not quite as widely in use as medium base screw sockets, care must be taken to ensure the homebuilder is not stuck with a luminaire that can’t possibly be installed to meet T24 standards.

Are there JA8 compliant versions of these lamps available for the installation?
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TITLE 24 UPDATES:
WHAT JA8 COMPLIANT LAMPS ARE AVAILABLE TODAY?

List online on:
https://cacertappliances.energy.ca.gov
Title 24 Updates: What JA8 Compliant Products Are Available Today?

List online on: https://cacertappliances.energy.ca.gov

(As of 4/4/17)

- 3,454 JA8 2016 Compliant inseparable luminaires and light sources
  - 61 manufacturing companies
  - 91 brands
  - Product Types:
    - Inseparable Luminaires: 3,145 models
    - Omnidirectional Lamps: 54 models
    - Directional lamps: 160 models
    - Light Engines: 89 models
    - Decorative lamps: 6 models
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TITLE 24 UPDATES:
WHAT MAXLITE JA8 COMPLIANT PRODUCTS ARE AVAILABLE TODAY?

10A19DLED927/JA8
10A19DLED930/JA8
60W INC equiv
10W, A19, E26, 800lm
JA8 / ENERGY STAR

E10A19DLED927/JA8
E10A19DLED930/JA8
ENCLOSED RATED
60W INC equiv
10W, A19, E26, 800lm
JA8 / ENERGY STAR

17A21DLED927/JA8
17A21DLED930/JA8
100W INC equiv
17W, A21, E26, 1600lm
JA8 / ENERGY STAR

F4B10DLED927/JA8
ENCLOSED RATED
40W INC equiv
4W, B10 Filament, E12, 450lm
JA8 / ENERGY STAR

F8.5A19DLED927/JA8
ENCLOSED RATED
60W INC equiv
4W, A19 Filament, E26, 800lm
JA8 / ENERGY STAR

10A19DLED927/JA8
10A19DLED930/JA8
60W INC equiv
10W, A19, E26, 800lm
JA8 / ENERGY STAR

In Stock Now

E10A19DLED927/JA8
E10A19DLED930/JA8
ENCLOSED RATED
60W INC equiv
10W, A19, E26, 800lm
JA8 / ENERGY STAR

17A21DLED927/JA8
17A21DLED930/JA8
100W INC equiv
17W, A21, E26, 1600lm
JA8 / ENERGY STAR

F4B10DLED927/JA8
ENCLOSED RATED
40W INC equiv
4W, B10 Filament, E12, 450lm
JA8 / ENERGY STAR

F8.5A19DLED927/JA8
ENCLOSED RATED
60W INC equiv
4W, A19 Filament, E26, 800lm
JA8 / ENERGY STAR

In Production Now

MR16, GU10, G25
GU24 Omni

Puck Lamp

In Stock Now

In Production Now

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Some manufacturers are deciding to put the JA8 compliant lamps in the box with the fixture
  • Eases installation and hassle for home builders
  • Ensures the proper type of lamp is installed in each fixture
Some manufacturers are deciding to produce separate luminaire SKUs with included compliant light sources just for California new construction market
Retailers may need to educate luminaire purchasers that intend to use products for permitted construction that they need to be sure to select code-compliant luminaires
• Outdoor Residential Luminaires
  • All outdoor lighting must be high efficacy
  • If the outdoor luminaire is a SSL Inseparable Luminaire, it automatically is deemed a “High Efficacy” luminaire
  • All outdoor lighting for single family homes is still required to be controlled by one of the following combinations:
    1. Photocell and motion sensor
    2. Photocell and time switch
    3. Astronomical time clock
    4. EMCS with features of astronomical time clock, does not allow the luminaire to be on during day, may be programmed for auto off at night

*Note: Lighting that is NOT attached to a building on a single-family site is NOT regulated by the state (such as landscape lighting)
• Luminaires that utilize LED Light Engines are required to register items on CEC database
  • This type of luminaire is referred to by the state as an Inseparable SSL Luminaire
  • Note that luminaires with sockets do NOT have to be registered
• The engines must be tested and labeled as JA8-2016 or JA8-2016-E
  • Special flicker testing required
  • High CRI engines
  • Dimmable
  • Only CCTs that are <= 4000K allowed
• If the engine is made to be removable, then 6,000 hours of life testing is needed.
  • If engine is inseparable, the LM80 data of the chip can be used
  • May limit the manufacturer’s design choices to ease replaceability for customer
• Lamp manufacturers must create entirely new SKUs for Title 24
• These lamps are specifically designed and labeled to be JA8 compliant
  • Utilizes more expensive and not as widely-available high color rendering LED chips
    • Chips must be $\geq 90\text{CRI}$ with $R9 \geq 50$
      • $R9 \geq 50$ ensures high red color rendering in the chips
• Lamps must be tested for 6,000 hours for lifetime specs
  • 8.5 months of testing, long lead time for market intro
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TITLE 24 UPDATES: T24 2016 IMPACT ON LAMPS

• Costly and time-consuming testing for new <30% flicker metrics
• Electronics for flicker and dimming requirements place limitations on miniaturizing lamp designs
  • Some smaller lamps are quite difficult to design with extra circuitry to meet flicker and dimming metrics
Title 20 is California’s appliance efficiency regulations.

Manufacturers must certify regulated products to the California Energy Commission prior to being sold or offered for sale in the state of California.

Failure to certify products can result in fines of up to $2,500 per non-compliant item.

Title 20 has no set schedule for updates, and is not updated according to a regular cycle. However, the T20 document is updated roughly every year to ensure that changes to the Federal standards are incorporated.

On Jan. 27, 2016 CEC voted to approve significant changes to lighting products in T20 2016 that will become effective January 1, 2018.
Partial list of products covered under Title 20:

- Refrigerators, freezers
- Air Conditioners
- Gas space heaters
- Water Heaters
- Gas pool heaters
- Plumbing Fittings
- **Fluorescent lamp ballasts**
- **Lamps**
  - Emergency lighting
  - Traffic signal modules/lamps
- **Luminaires**
- Dishwashers
- Clothes washers
- Cooking products
- Electric motors
- Low voltage transformers
- Power Supplies
- Televisions, Consumer A/V equipment
- Battery charger systems

All state regulated products are required to be certified and registered in CEC database.
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LUMINAIREs REGULATED UNDER TITLE 20 2016

• Metal Halide luminaires
  • Minimum efficacy required
• Undercabinet Luminaires
  • Only applicable to T8 fluorescent lamps attached to office furniture
  • Min. ballast efficacy required, except dimmable ballasts
• Portable Luminaires
PORTABLE LUMINAIRE REQUIREMENTS UNDER TITLE 20 2016

(for all luminaires manufactured on/after Jan. 1, 2010)

Requirements (must meet at least one):

1. Dedicated fluorescent lamp socket connected to high freq. electronic ballast within the portable luminaire
2. Be equipped with GU24 socket and NOT rated for use with INC lamps
3. Be an LED luminaire or portable luminaire with an LED Light Engine with integral heat sink and comply with table N-2

Table N-2 Requirements for portable luminaires with LED Light Engines

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light Output</td>
<td>200 lm</td>
</tr>
<tr>
<td>Min. LED Luminaire efficacy</td>
<td>29 lm/w</td>
</tr>
<tr>
<td>Min. LED Light Engine efficacy</td>
<td>40 lm/w</td>
</tr>
<tr>
<td>Correlated Color Temp (CCT)</td>
<td>2700K to 5000K</td>
</tr>
<tr>
<td>Min. Color Rendering Index (CRI)</td>
<td>75 CRI</td>
</tr>
<tr>
<td>Power Factor</td>
<td>0.7 PF</td>
</tr>
</tbody>
</table>

(For luminaires labeled or sold for residential use)
PORTABLE LUMINAIRE REQUIREMENTS UNDER TITLE 20 2016

(for all luminaires manufactured on/after Jan. 1, 2010)

Requirements (must meet at least one):

4. Be equipped with E12, E17, or E26 base and ...
   • Pre-packaged and sold together with one screw-base CFL or LED lamp for each socket
     • CFL or LED lamp must be compatible with luminaire controls
     • CFLs must meet ENERGY STAR lamp efficacy of Dec. 31, 2008
       • (50 to 65 lm/w)
     • LED lamps must meet min. requirements of current T20

5. Be equipped with one or more single-ended non-screw base halogen lamp sockets (line or low voltage), dimmer control or hi/low controls, and be rated for a max of 100W

*Note:*
• Exceptions for art work luminaires and portable wall mount adjustable luminaires with max 24” articulated arm.
• Portable luminaires with internal power supplies must have zero standby power when luminaire is off
Starting in 2018, California has new statewide requirements for the following lamp types:

- **State-Regulated LED lamps**
  - Includes LED lamp bases: E12, E17, E26, GU24, incl retrofit kits for cans with these same bases
    - Does NOT include lamps ≥ 2,600 lm or lamps that cannot provide light with CCT between 2200K and 7000K

- **State-regulated Small Diameter Directional Lamps**
  - Includes pin base and E26 base
  - Includes MR16, MR11, Par, R type with dia. ≤ 2.25”
    - Only lamps with lumen output ≤ 850 lm or rated wattage of 75W or less and has rated life greater than 300 hrs

Note: These lamps have not been previously regulated by the state of CA, new regulations start Jan. 1, 2018
NEW LAMPS REGULATIONS UNDER TITLE 20 2016

State-regulated LED lamps manufactured on/after January 1, 2018 with output \( \geq 150 \text{lm} \) (E12 base) or \( 200 \text{lm} \) (other base)

- CRI \( \geq 82 \)
  - R1 through R8 values \( \geq 72 \)
- PF \( \geq 0.7 \)
- Rated Life \( \geq 10,000 \text{ hrs} \)
- Minimum efficacy compliance score per table K-14 below

<table>
<thead>
<tr>
<th>Effective date</th>
<th>Min. Compl Score</th>
<th>Min. Efficacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 1, 2018</td>
<td>282</td>
<td>68 lm/w</td>
</tr>
<tr>
<td>July 1, 2019</td>
<td>297</td>
<td>80 lm/w</td>
</tr>
</tbody>
</table>

Example:

- \( 68 \text{ lm/w} + (2.3 \times 90 \text{ CRI}) \implies 275 \text{ compl score} \)  \( \text{FAIL} \)
- \( 75 \text{ lm/w} + (2.3 \times 90 \text{ CRI}) \implies 282 \text{ compl score} \)  \( \text{PASS} \)

Starting January 1, 2018, state-regulated LED lamps will be required to be certified and registered in CEC database.
State-regulated Small Diameter Directional lamps manufactured on/after January 1, 2018

- Rated Life $\geq 25,000$ hrs and...
- Minimum efficacy of 80 lm/w
  or
- Minimum efficacy of 70 lm/w and Compliance Score $\geq 165$
  - Compliance Score = Efficacy + CRI

Example:
- $70 \text{ lm/w} + 90 \text{ CRI} \Rightarrow 160 \text{ compliance score} \quad \text{FAIL}$
- $75 \text{ lm/w} + 90 \text{ CRI} \Rightarrow 165 \text{ compliance score} \quad \text{PASS}$

Note: These new requirements will eliminate most INC and halogen MR11, MR16, GU10, R/Par16 lamps in favor of LED
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## IMPACT ON PORTABLE LUMINAIRES WITH SOCKETS?

<table>
<thead>
<tr>
<th>Item</th>
<th>Luminaire Registration</th>
<th>Lamp Registration Today</th>
<th>Lamp Registration Jan 1, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portable Luminaire with E26 CFL</td>
<td>Luminaire must be registered with state</td>
<td>CFL must meet Federal and State Requirements. Registered with both DOE and CEC</td>
<td>CFL must meet Federal and State Requirements. Registered with both DOE and CEC</td>
</tr>
<tr>
<td>Portable Luminaire with E26 LED lamp</td>
<td>Luminaire must be registered with state</td>
<td>None required (no Federal or State regulation)</td>
<td>LED lamp must meet State Requirements. Registered with CEC.</td>
</tr>
</tbody>
</table>

**Note:** T20 also includes marking guidelines, must show Date of Manufacture. Effective date is per manufacturing code.
JA8 compliant lamps, since requiring more stringent specifications, should all meet T20 requirements in 2018. Note the lamps will not only need to be registered in JA8 database, but also will need to be registered in the CEC database under State-Regulated LED lamps in 2018.

Note: T20 requires labs performing tests to be approved by California Energy Commission, T24 does not
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FOR MORE INFO ON ENERGY STAR®, TITLE 24 & TITLE 20:

- For more info on ENERGY STAR®:
  - Lamps: [www.energystar.gov/lamps](http://www.energystar.gov/lamps)
  - Luminaires: [www.energystar.gov/luminaires](http://www.energystar.gov/luminaires)

- For more info on California Title 24 2016
  - [http://www.energy.ca.gov/title24/](http://www.energy.ca.gov/title24/)

- For more info on California Title 20
  - [http://www.energy.ca.gov/appliances/](http://www.energy.ca.gov/appliances/)
Thank you everyone for your attention! Please feel free to use this opportunity to ask any questions you may have about MaxLite or the products shown in this presentation.

For more information about other MaxLite products, or for lighting questions in general; please contact:

info@maxlite.com
http://www.maxlite.com
1-800-555-5629