February 18, 2016

Bonneville
POWER ADMINISTRATION

MOMENTUM SAVINGS

DON’T COME WITH A REBATE

As an industry,

PROGRAMS

have been our lens into the market.

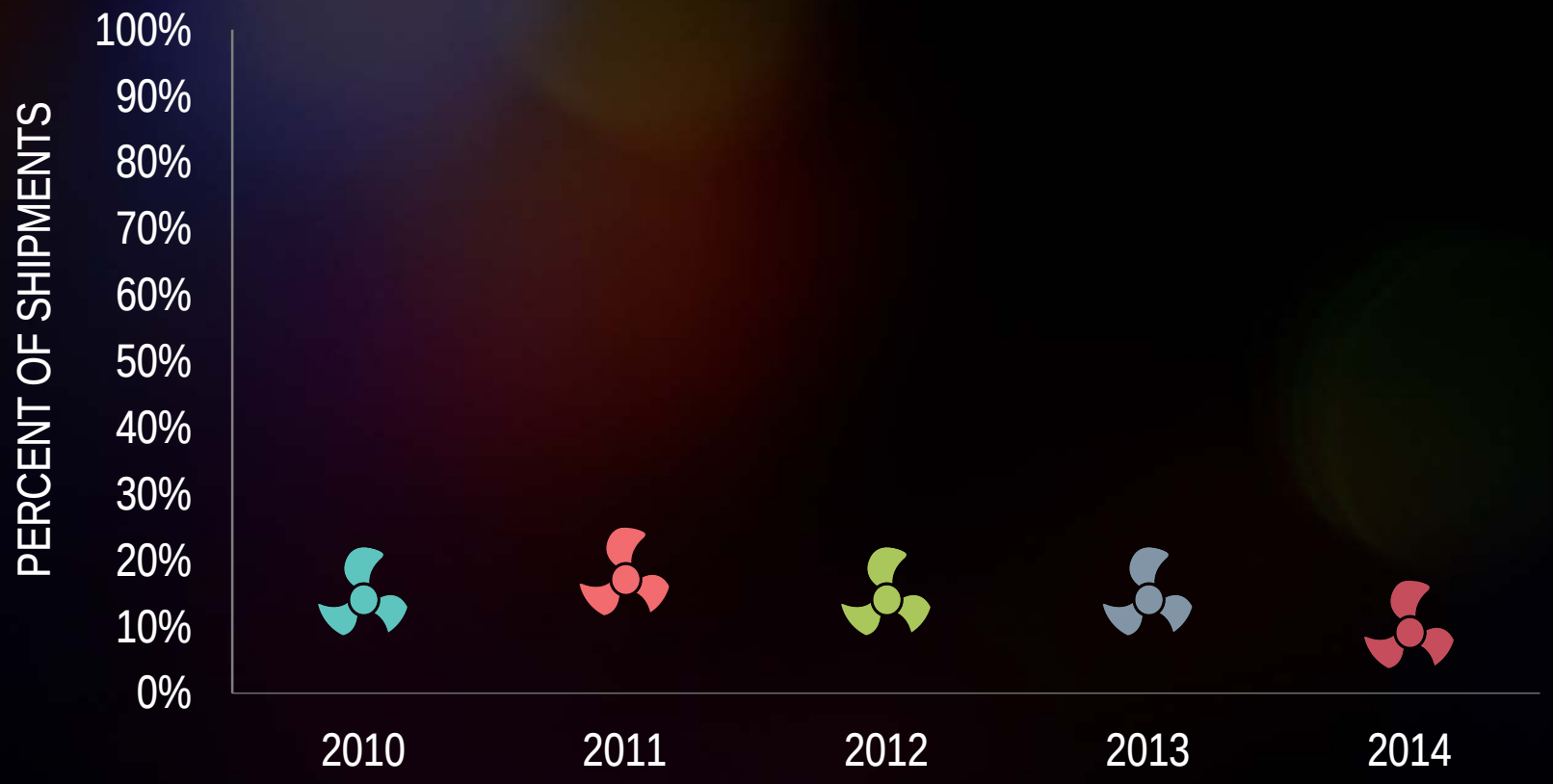
Why would anyone do efficiency

WITHOUT OUR MONEY?

Momentum Savings research is finding a

BROADER MARKET CONTEXT

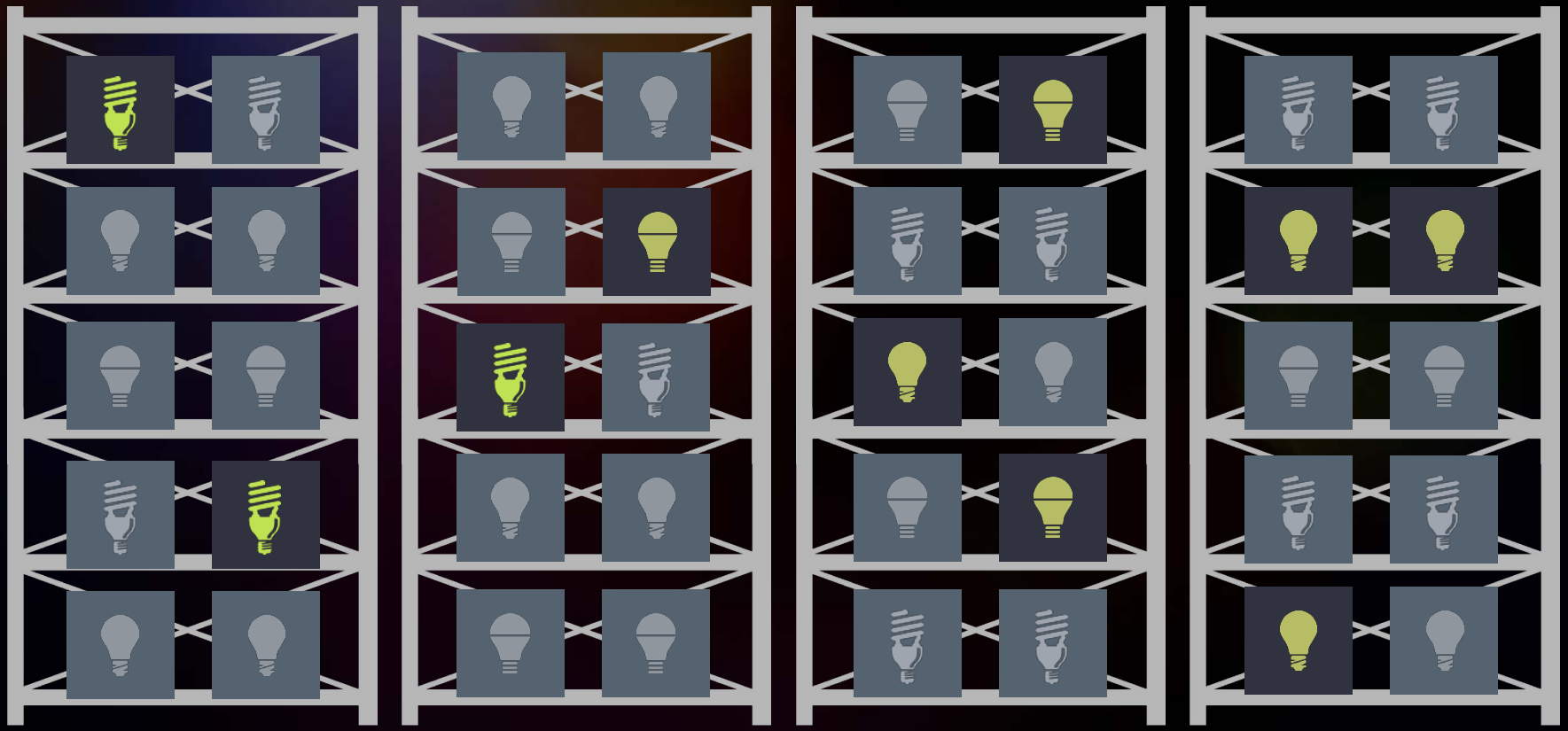
PROGRAM AS PERCENT OF MARKET FOR ASHP ALL HEATING ZONES



In 2014, programs bulbs represented roughly

~25% OF ALL BULBS SOLD

in the Northwest



We are seeing an

ECOSYSTEM

of efficiency
in the
market.

CAUSES OF

EFFICIENT ACTIVITY

IN THE BROADER MARKET

“INCIDENTAL” EFFICIENCY.

Popular product features drive sales;
Sometimes they are also efficient.

Manufacturer Branding

STRATEGIES

Good-better-best differentiation
achieved through bundling

EXTERNAL POWER SUPPLIES

Lightweight Mobility

LED LIGHTING

For Retailer Parking Lots

Efficient products may reduce

NON-ENERGY OPERATING COSTS

Longer Lifetimes:

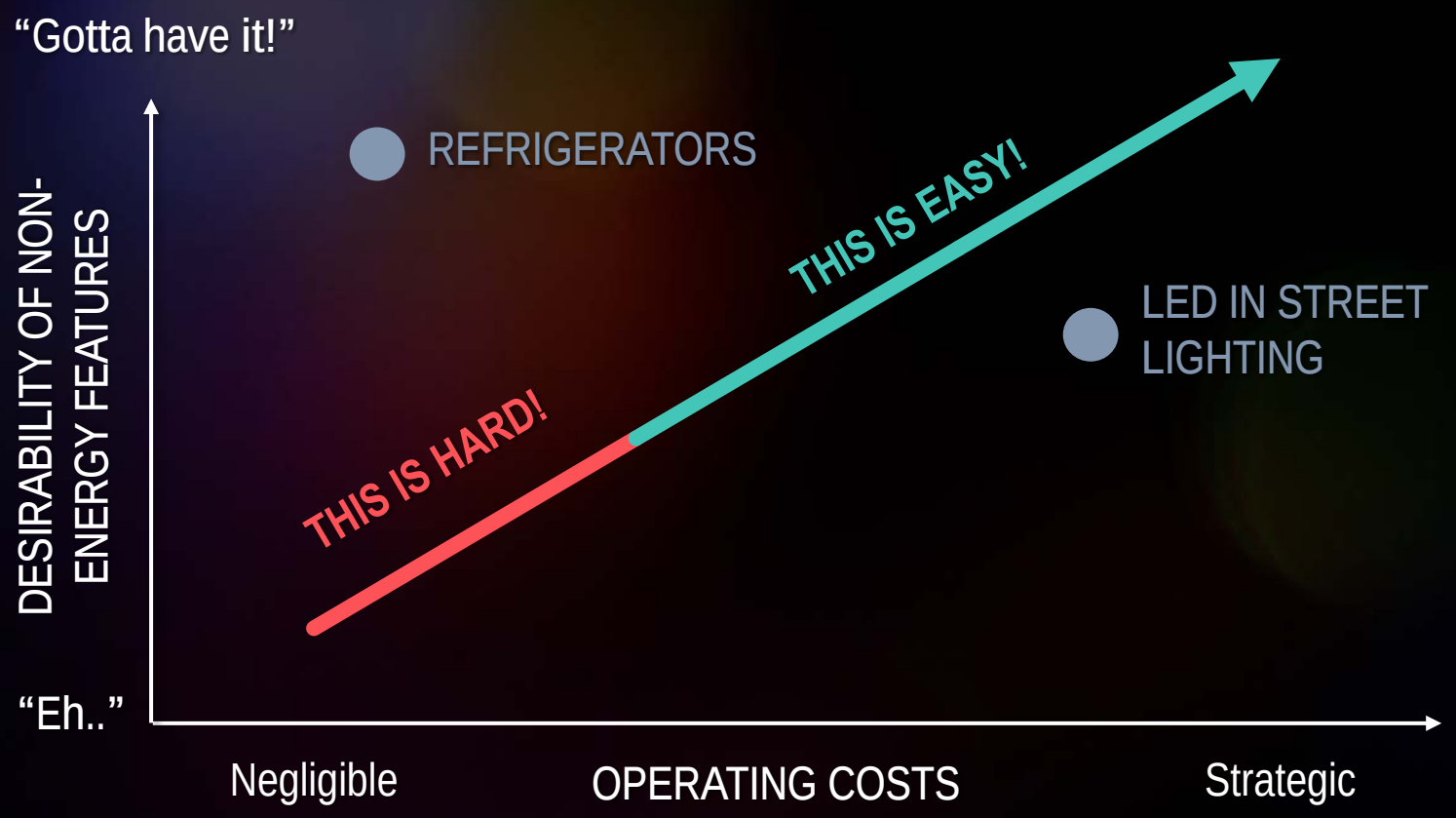
- ☑ Avoided lamp purchases
- ☑ Avoided installation costs
- ☑ Reduced shut downs

DUCTLESS

Heating and Cooling

Sometimes it’s just comfort.

INCIDENTAL EFFICIENCY THEORY



Market Dynamics change

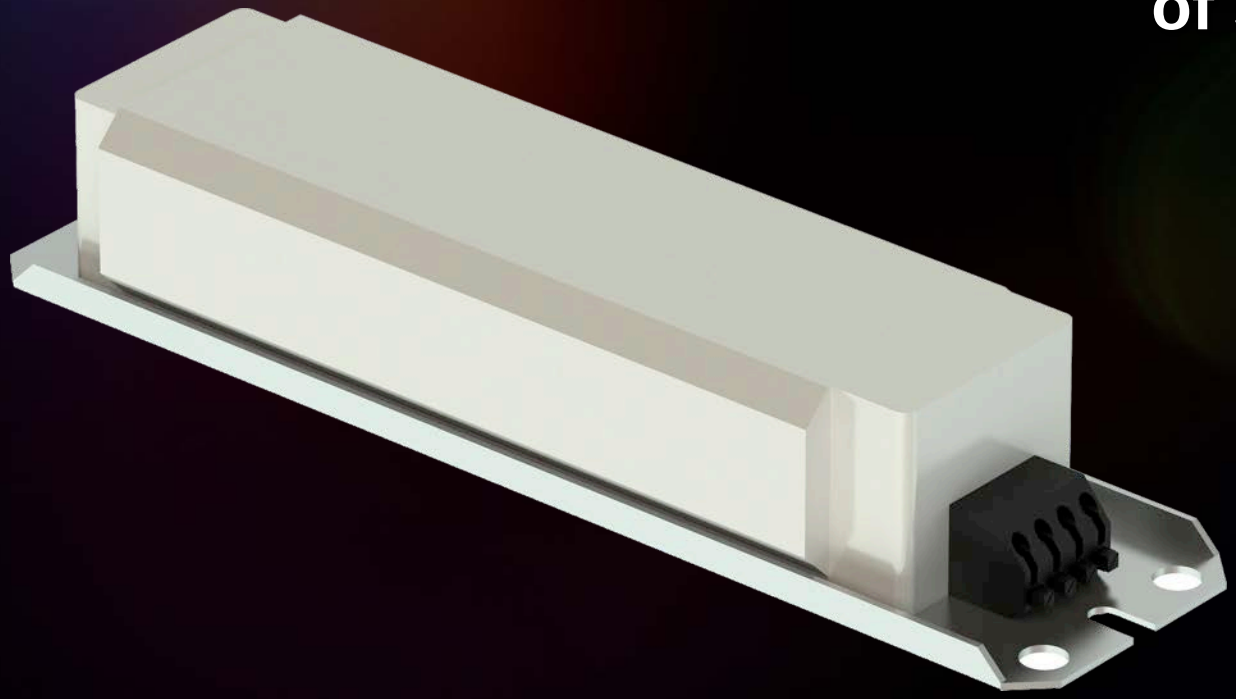
PRICING

2

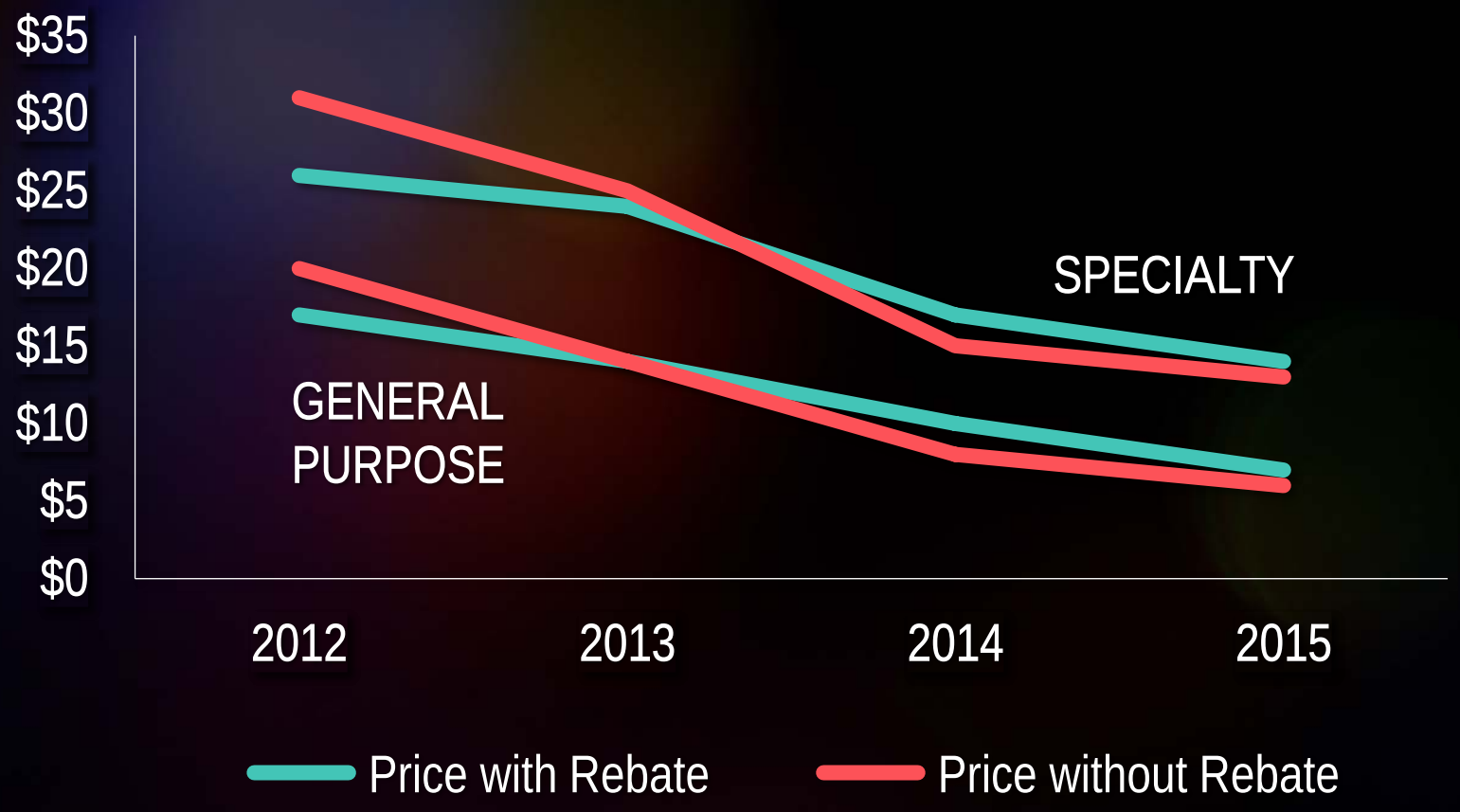
The efficiency premium is often about

VALUE PRICING AND ECONOMIES

of scale.



LED SPECIALTY vs. GENERAL PURPOSE PRICES, 2012-2015



Source: NEEA shelf survey data

3

National corporate policies driven by both

PROFIT

and corporate sustainability goals.

citibank

2020 goals in operations:

30% absolute energy reduction

33% of real estate portfolio LEED certified

GOAL: Reduce stores' energy consumption by 25% (vs 2008).

Installed Energy Management Systems 4,000 stores

LED and natural lighting strategies

Marriott®

HOTELS · RESORTS · SUITES

Further reduce energy 20% per kwH/conditioned space from 2007 baseline

Increase LEED certification

Walmart

Retrofitting parking lots and retail spaces with LEDs across country.

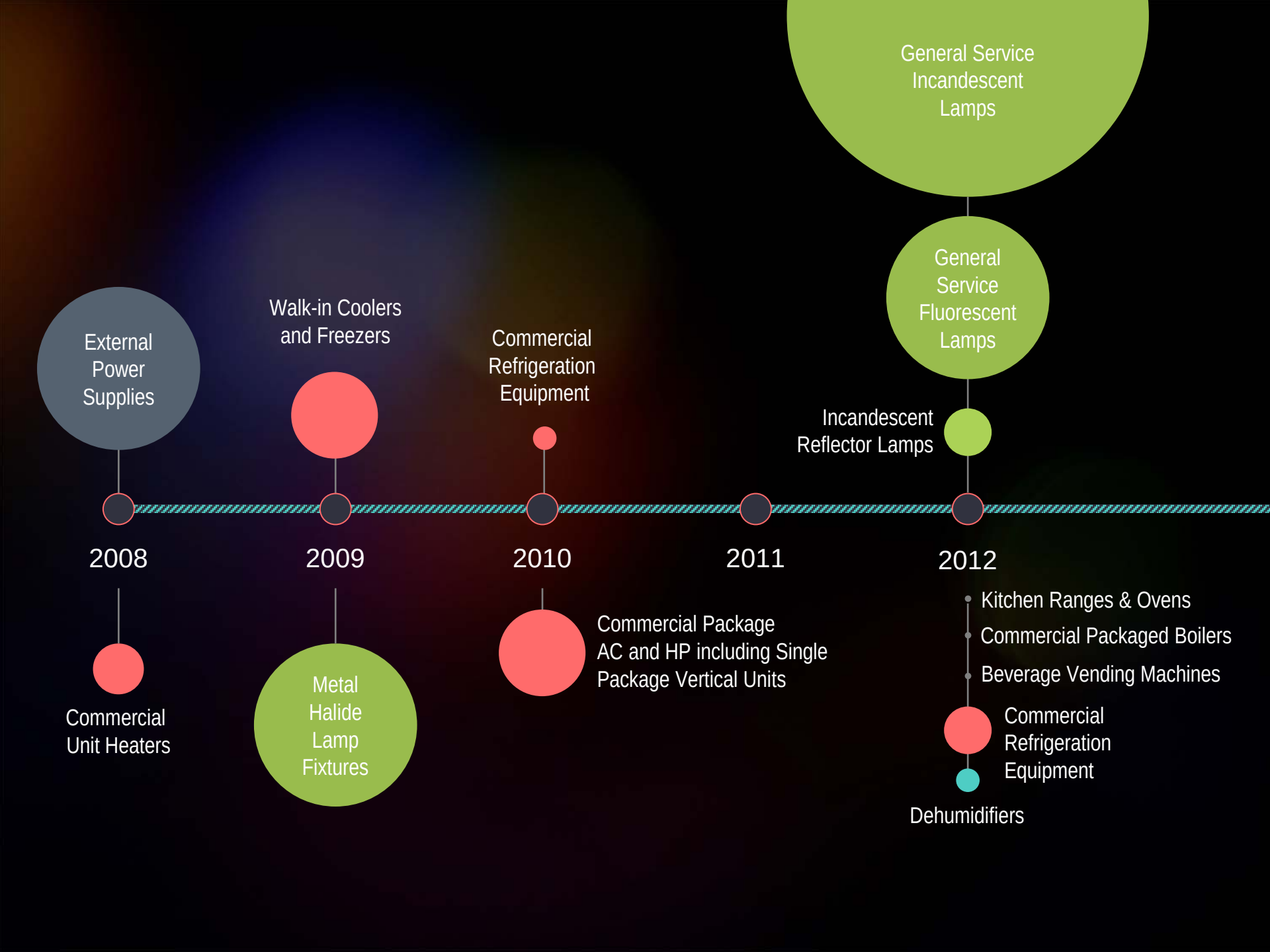
IKEA

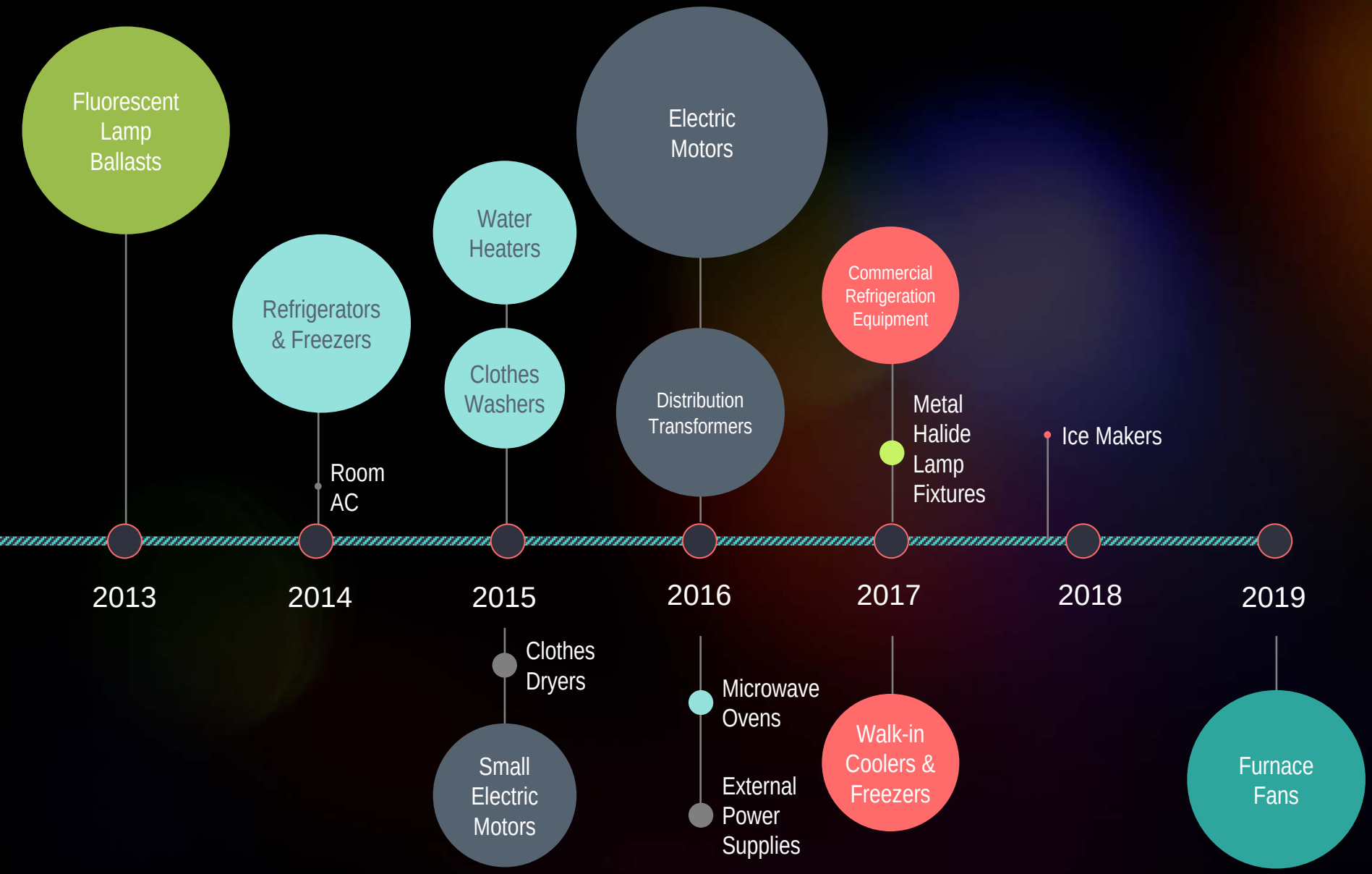
First major U.S. retailer to only sell LED bulbs and lighting.

COSTCO WHOLESALE

Only **sells CFLs and LED bulbs in most of the country.**

4 CODES + STANDARDS


General Service Incandescent Lamps
General Service Fluorescent Lamps
External Power Supplies
Walk-in Coolers and Freezers
Commercial Refrigeration Equipment
Incandescent Reflector Lamps
2008
2009
2010
2011
2012
Commercial Unit Heaters
Metal Halide Lamp Fixtures
Commercial Package AC and HP including Single Package Vertical Units
Kitchen Ranges & Ovens
Commercial Packaged Boilers
Beverage Vending Machines
Commercial Refrigeration Equipment
Dehumidifiers


Fluorescent Lamp Ballasts
Refrigerators & Freezers
Room AC
Water Heaters
Clothes Washers
Electric Motors
Distribution Transformers
Commercial Refrigeration Equipment
Metal Halide Lamp Fixtures
Ice Makers
2013
2014
2015
2016
2017
2018
2019
Clothes Dryers
Small Electric Motors
Microwave Ovens
External Power Supplies
Walk-in Coolers & Freezers
Furnace Fans

Codes + Standards
National Corporate Policies
“Incidental” Efficiency
Programs
Price Parity

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