

Momentum Savings

**Monthly Call
December 5th**





ETHAN

MANTHEY

Agenda

- Feedback Session
- Agriculture Market Today
- Lighting Distributor Research Kick Off
- Online Lighting Retail Interview Findings
- Updates on Appliance Standards



CARRIE

COBB

What is the top reason you attend Momentum Savings monthly calls?

1. To get updates on new market research findings
2. To learn about the status of current studies
3. To hear about energy efficiency savings outside of utility programs
4. To understand how BPA tracks and quantified these energy savings from a technical perspective
5. Other:

What content would you like more of?

1. Research project updates (such as status on deliverable development and logistics around projects)
2. Short updates on market findings (such as sharing out findings from research, sales data analysis, interview analysis, momentum savings market analysis)
3. Energy Savings analysis and technical methodologies for tracking savings
4. Momentum Savings forecasts and tracking to goals
5. Trade show and market tracking information (such as key industry dynamics, regulations, what we learn at trade shows)

Webinar Best Practice Findings

1. Use pictures of the speaker, people like faces
2. A different voice every ten minutes
3. Use polls for keeping things interactive
4. All presenters in a room together to make it more human
5. Lots of visuals and movement



BONNIE

WATSON



The Agriculture Market Today



What do we know about agriculture within BPA's territory?



Dairy



Lighting



Greenhouses



Irrigation








What do we know about irrigation in BPA territory?

**Columbia
River
Basin**



KEY

-  BPA service area
-  Other utilities' service areas
-  Agriculture

Columbia River Basin Irrigation

BPA Irrigated
628,000 Acres



Non-BPA Irrigated
1,090,000 Acres



Southern Idaho Irrigation

BPA Irrigated
151,000 Acres



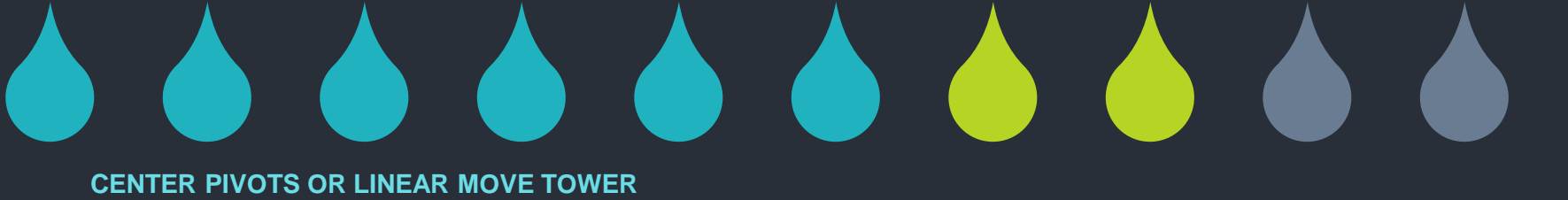
Non-BPA Irrigated
2,145,000 Acres



In BPA's territory, there is roughly four times as much irrigated agriculture in the Columbia River Basin than in Idaho



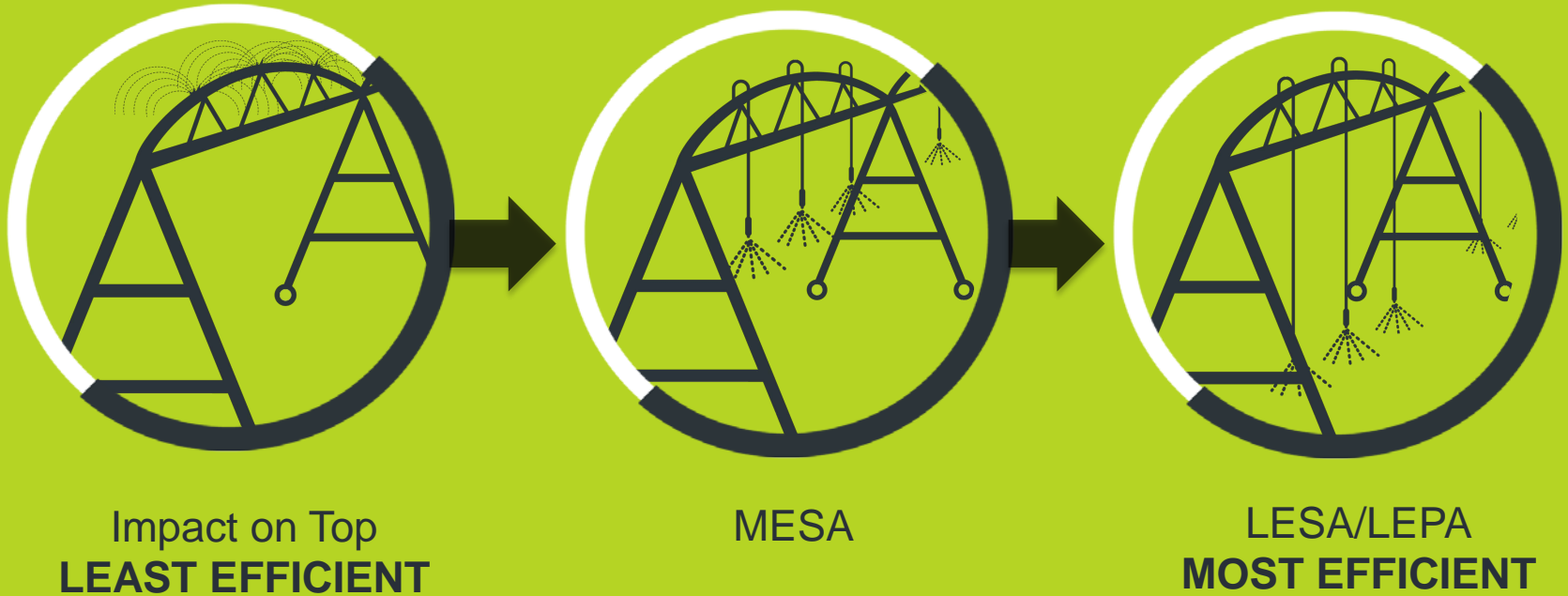
What types of irrigation systems are located in BPA territory?





What do we know about efficiency of irrigation systems?

Changes in Sprinkler Efficiency in the Market



Current Practice



Impact on Top
LEAST EFFICIENT

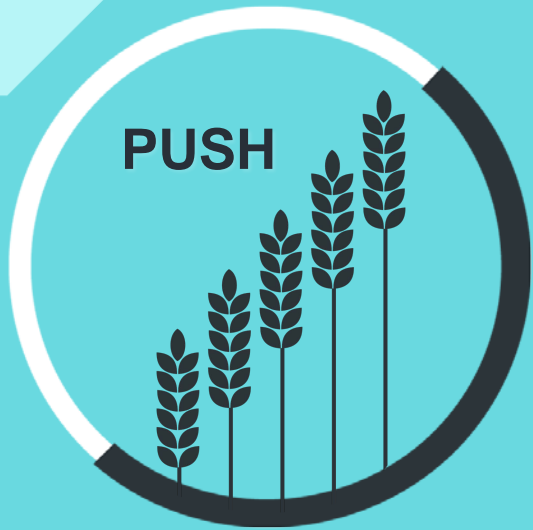


MESA



LESA/LEPA
MOST EFFICIENT

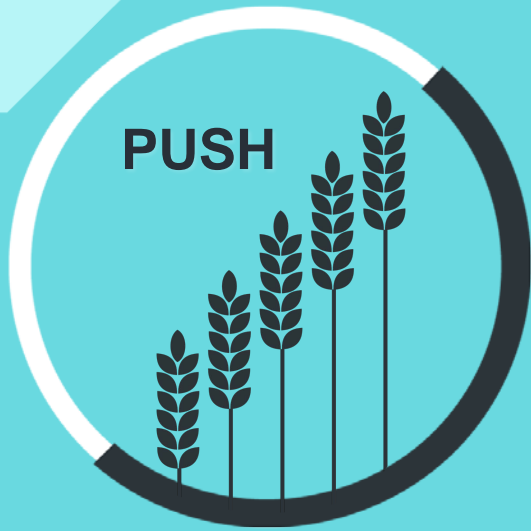




VS.



Strategy for EE Programs



21%
program savings

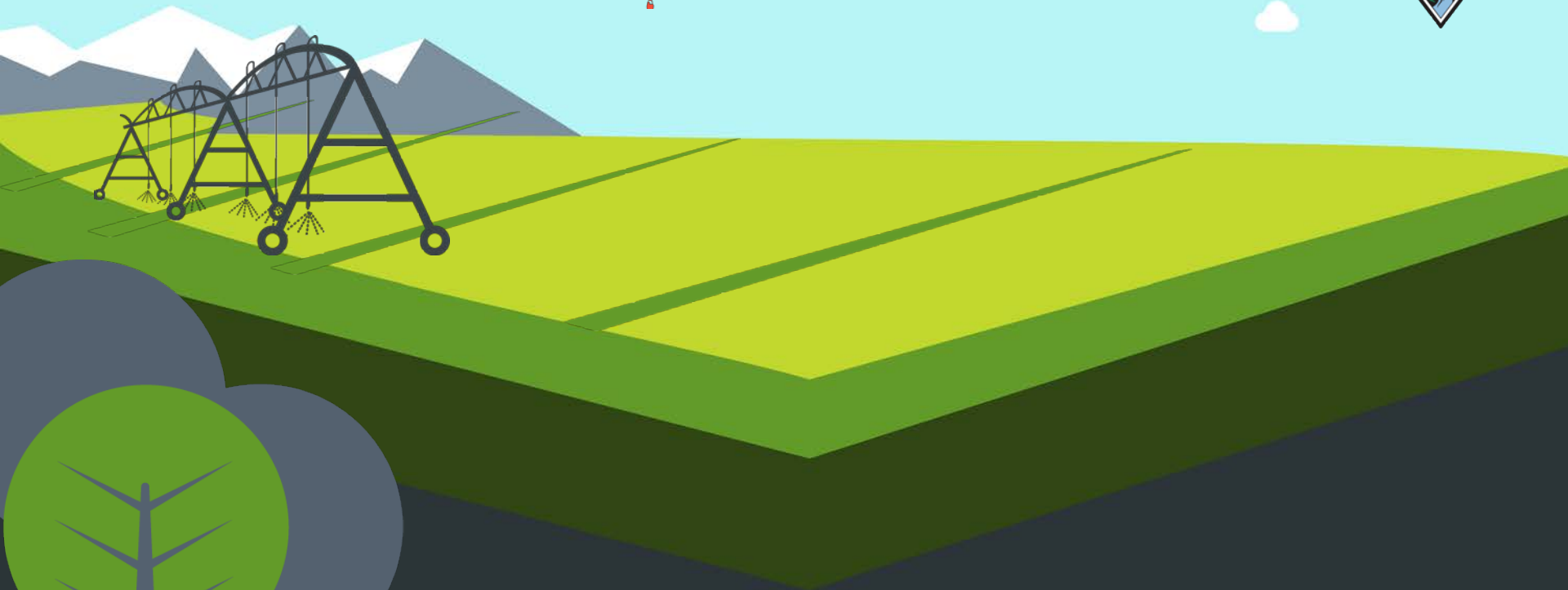
VS.



79%
program savings



Sprinklers in BPA Program



Part 2: Ag Irrigation Market Opportunities

December 13, 2016

10:00 - 11:30 am



ETHAN

MANTHEY



Kick Off

2017 Non-Res

Lighting Sales

Data Project



JESSICA

AIONA

ONLINE RETAILER

MARKET ACTOR
INTERVIEW FINDINGS

THEN



NOW

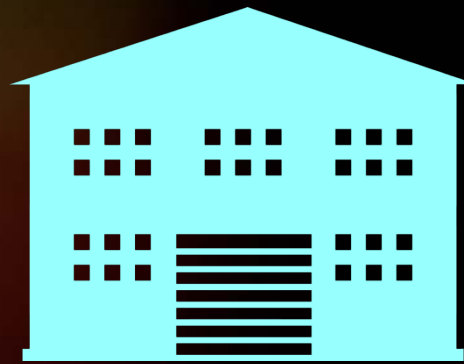
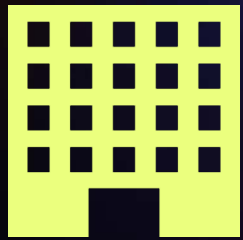


WHAT WE DID



**Interviews with three
Market Actors**

MARKET SHARE



50%

DIY

32%

Mass Merchandise
and Club Stores

14%

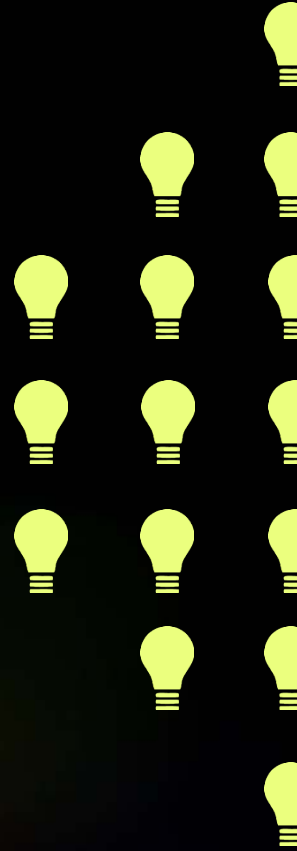
Small
Hardware

4%

Online

ONLINE IS GROWING



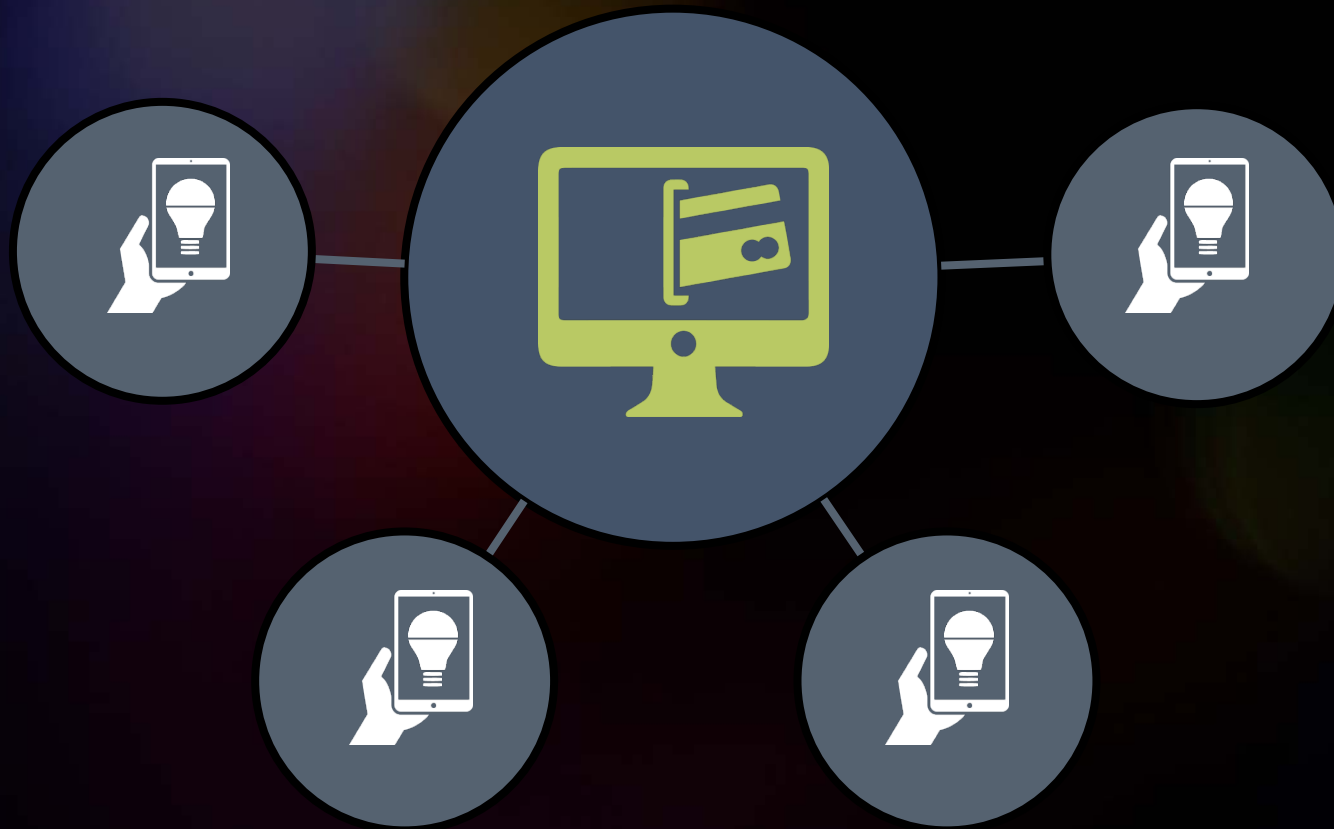


HARD TO FIND LAMPS



**INCANDESCENTS
ARE POPULAR**

SOPHISTICATED PLATFORMS



MORE TO BE DONE



DOE **Utility**
pu **Programs**
comment



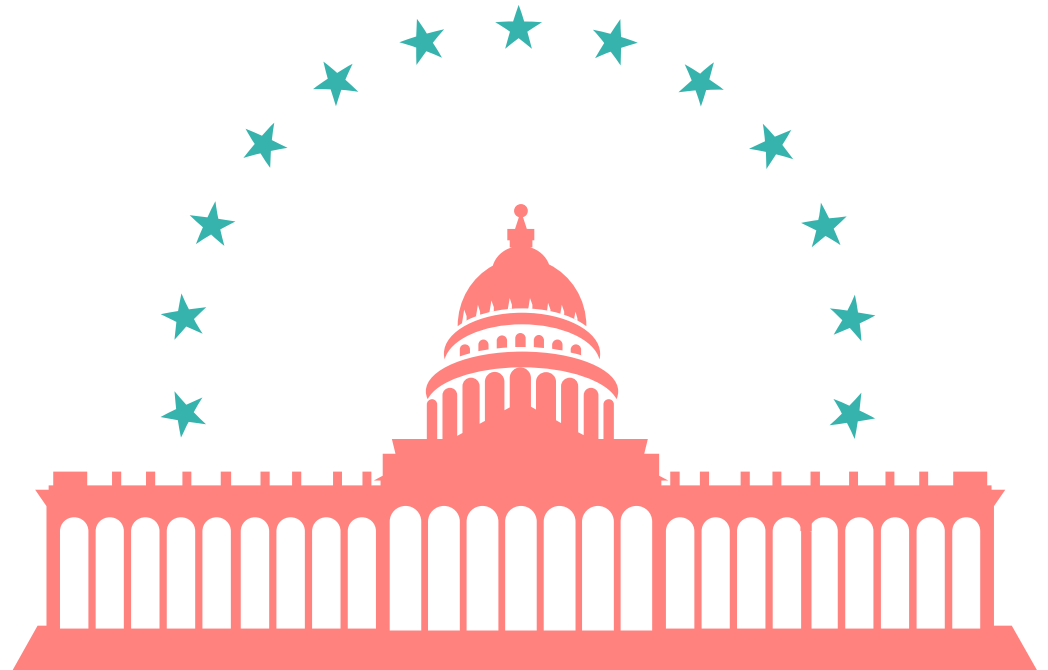
Research



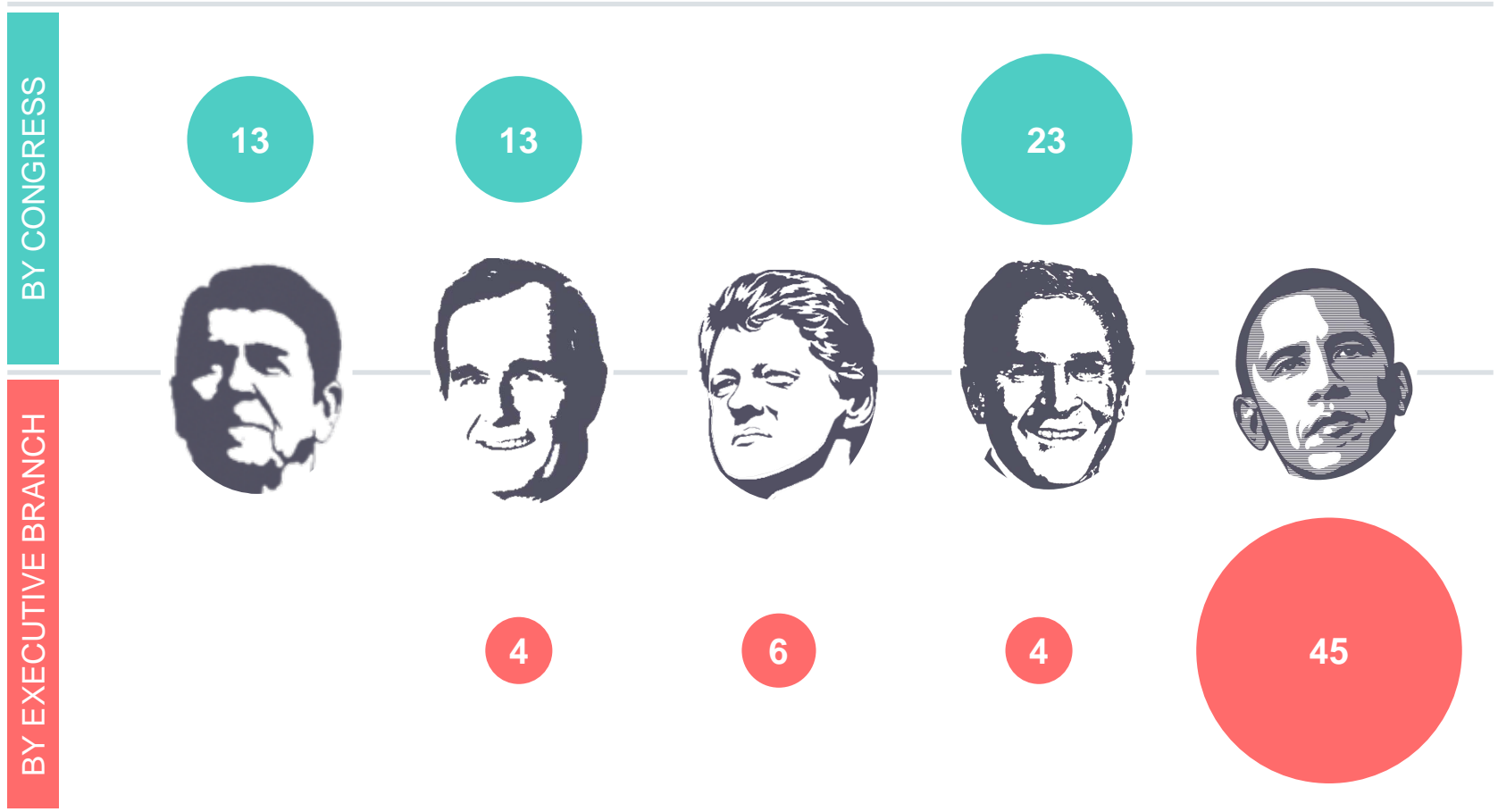
CARRIE

COBB

FEDERAL APPLIANCE STANDARDS UPDATE



STANDARDS ADOPTED BY ADMINISTRATION



*As of June 20, 2016
Source: ASAP/ACEEE

PROCESSES THAT COULD IMPACT SOME "DONE" STANDARDS

1

Congressional Review Act (CRA). A "60 legislative day" Congressional review.

2

Error Correction Process: Before a standard is placed in the Federal Register, there is an "error correction" process which requires a 45 day waiting period.

3

Waiting Period: A 110 day period during which anybody can raise objections. The Secretary of Energy can decide to withdraw rules in response to objections.

STANDARDS THAT MIGHT BE IMPACTED

1

(1) Ceiling fans (2) Uninterruptible power supplies (3) Portable ACs (4) Commercial boilers (5) Compressors Walk in coolers

2

(1) Central AC/HP (DOE published this rule on 12/5)
(2) Dedicated pool pumps

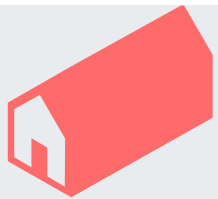
3

(1) Dehumidifier
(2) Battery chargers

EISA AND MANUFACTURED HOMES



Waiting to see on expanded coverage



These standards could be published in the federal register by January 20th, but would be subject to the Congressional Review Act.

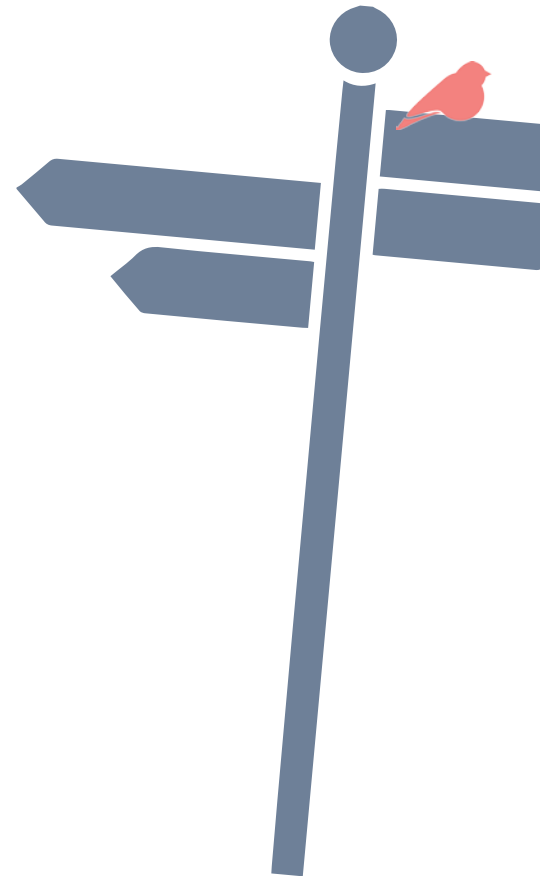
OUR NEXT CALL

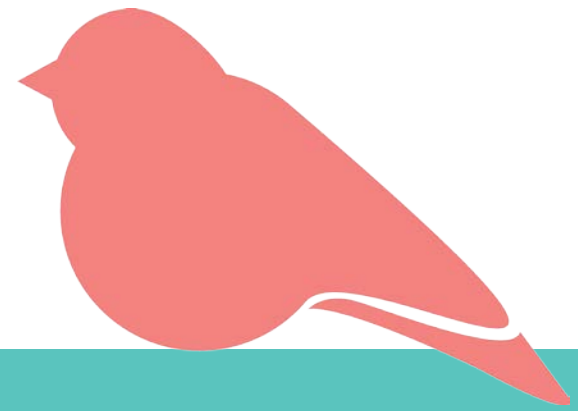
Hoping to include a guest speaker: Tom Eckman or Council staff

We will be trying to get more information on the process surrounding EISA and the manufactured homes standards for the January call

WATCH FOR

- LIGHTING RESEARCH RESULTS
 - RESIDENTIAL FINAL RESULTS
 - NON RESIDENTIAL DRAFT RESULTS
 - MARKET INTELLIGENCE BOOKLET
- DECEMBER 13TH AG PRESENTATION
- NATIONAL ACCOUNTS RESEARCH
- UPDATE ON STANDARDS





See you next month!

- Next meeting: **January 4th**

Happy Holidays!