



August 2026 Quarterly Call

Momentum Savings & Market Research

Aug. 5, 2026



**Name, Org, +
Answer This Question:**

***What's your favorite
ice cream flavor?***



Agenda

- Team Updates
- FY 27-28 Market Modeling
- Research Updates by Market

Team Updates

- New research contractor:
DNV Energy Insights, with
sub-contractors:
 - Apex Analytics
 - BrightLine Group
 - Kate Bushman Advising
- Currently transitioning
research and market models
to new contractor

Market Research Team



Joan Wang
Market Research
Team Lead



Masumi Izawa
Market Research
Project Manager
*Residential HVAC &
Adjustable Speed Drives*



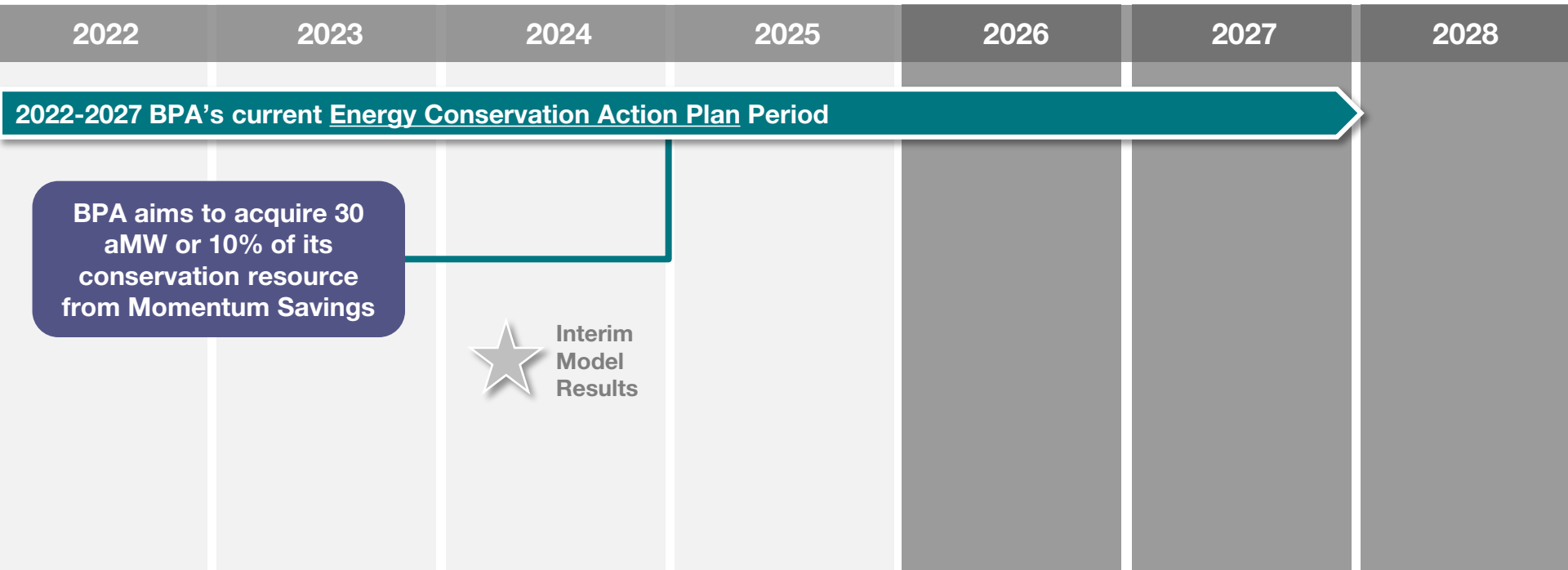
Hope Lobkowicz
Market Research
Project Manager
*Nonresidential Lighting &
Commercial HVAC*

FY 27-28 Market Modeling

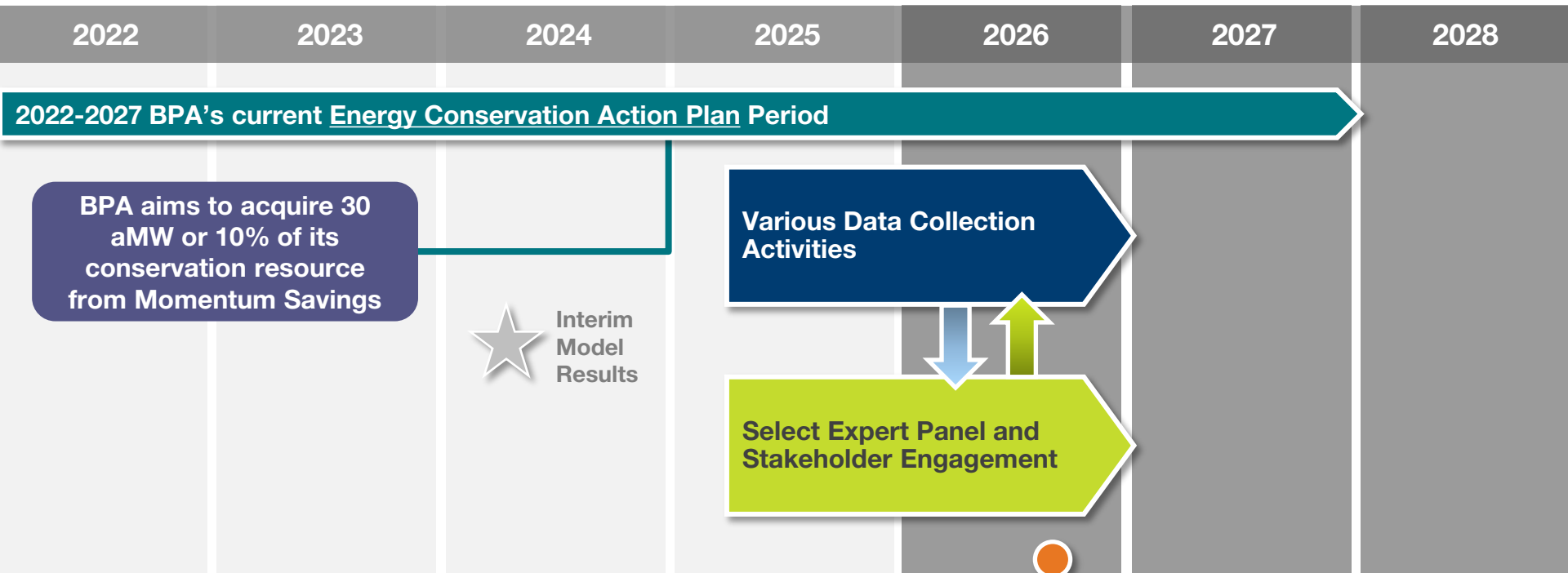
B O N N E V I L L E P O W E R A D M I N I S T R A T I O N



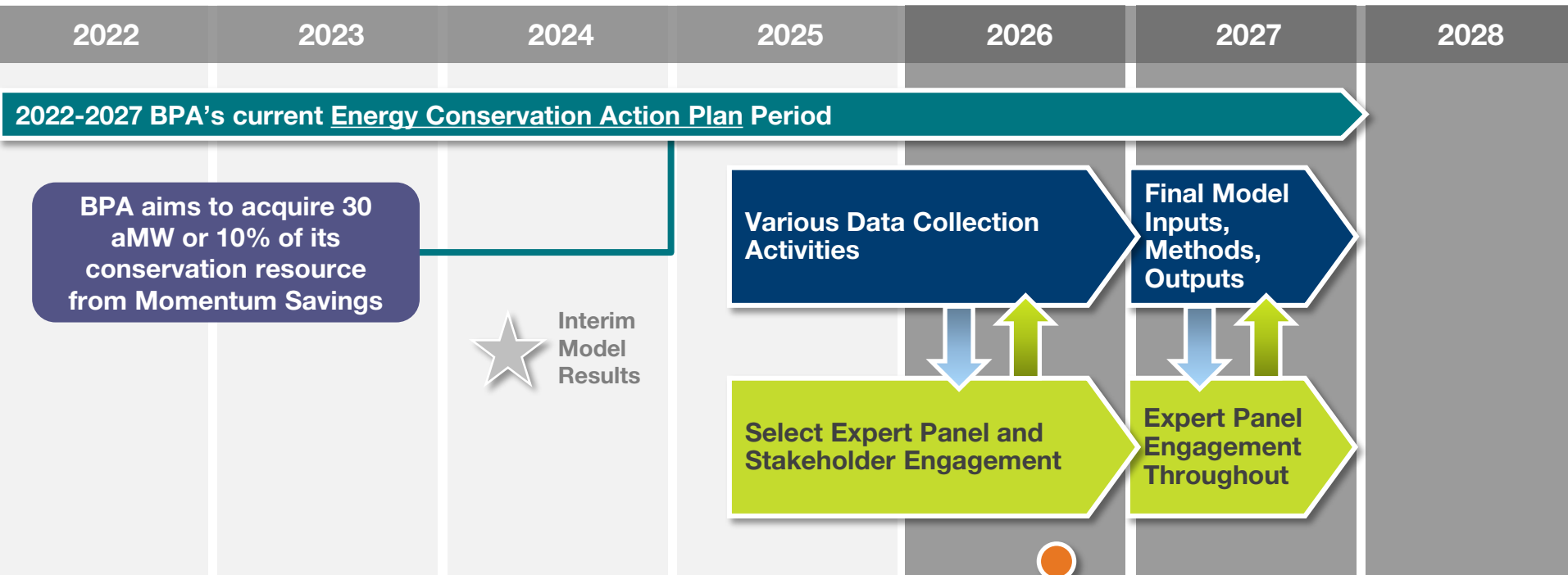
FY27-28 Priority: Update Market Models



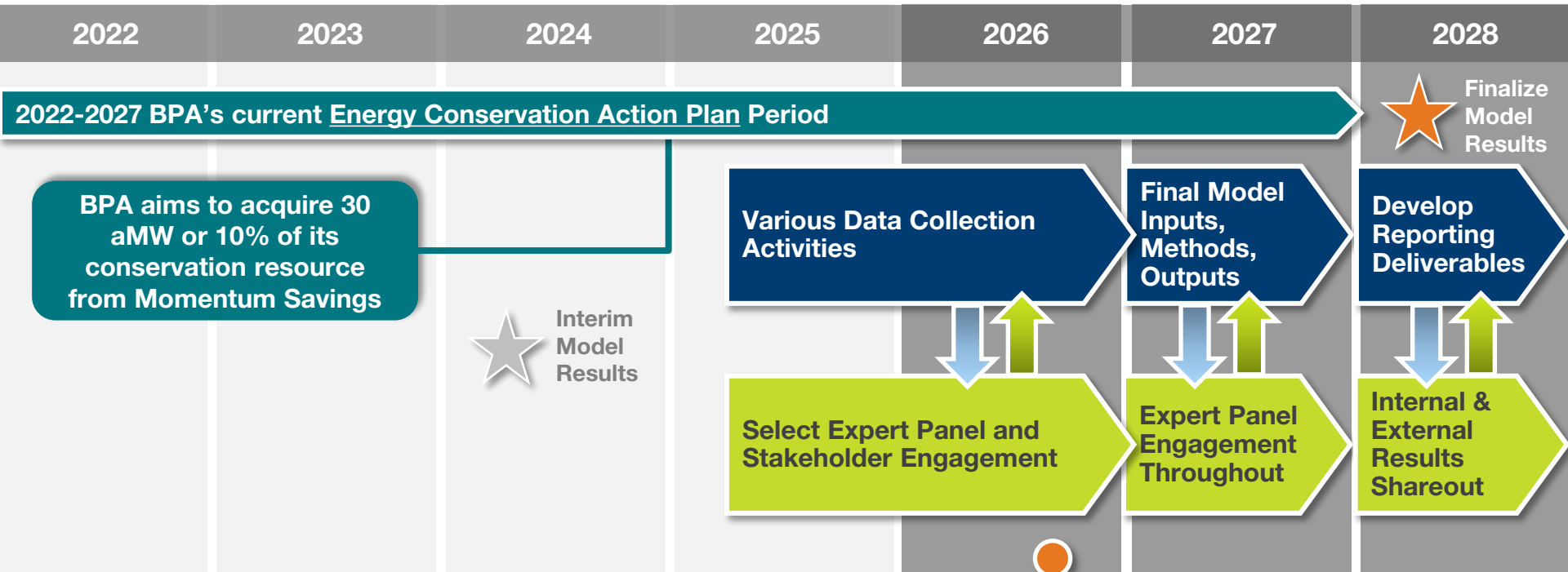
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Research Updates by Market

B O N N E V I L L E P O W E R A D M I N I S T R A T I O N



Residential (Res) HVAC



Current: Res HVAC Installer Survey

Study Overview

- Sets goal of quantifying HVAC installation trends and common heat pump configurations and installation practices from ~120 NW installers
- Studies installations and practices in 2025 across single family, multi-family, and manufactured home buildings
- Provides critical inputs to BPA's Res HVAC Market Model and informs heat pump program planning and evaluation for BPA

Progress Updates

- Finalized sampling plan, contacts list, and survey instrument
- Completed pilot survey with seven installers
- Rolled out full launch at end of July

TIMELINE

Summer 2026

Field survey

Fall 2026

Analyze survey data

Finalize survey results

Winter 2026-27

Integrate into model

Publish memo in Feb.

Upcoming: Res HVAC Market Model Update

Primary data refresh: 2022-2025 HVAC sales trends and res HVAC installer survey findings

Review and possible updates to HVAC equipment efficiency categories and energy consumption estimates (UECs)

New data scan and updates to weatherization model inputs

Integration of reported savings from regional utility programs and Northwest Energy Efficiency Alliance (NEEA) initiatives

MARKET TRENDS



Heat pump sales surpassed gas furnace sales in 2022-2024



Increased heating/cooling efficiencies in ASHPs and CACs since federal standards change in 2023



Sales of inverter-based technologies (VSHPs and MSHPs) increasing

Nonresidential Lighting (NRL)

BONNEVILLE POWER ADMINISTRATION



Current: NRL Sales Data Analysis

Study Overview

- Analysis of 2025 full-category sales data provided to NEEA by a panel of Northwest lighting distributors
- Qualitative insights into the market impacts of 2025 Oregon ban on fluorescents

Preliminary Findings

- Total NRL unit sales up from 2024: most growth is in LEDs
- Overall LED market share (percent of sales) is ~ **80 percent**; growth in fixtures vs. lamps
- Overall linear fluorescent sales volume decreased by ~ **39 percent**

TIMELINE

Summer 2026

Finalize sales analysis from 22 distributors & finish distributor interviews (w/ NEEA)

Fall 2026

Publish report in Sep.

Share insights in Nov. quarterly [call](#)

Upcoming: NRL Market Model Update

Primary sales data/market
intelligence refresh

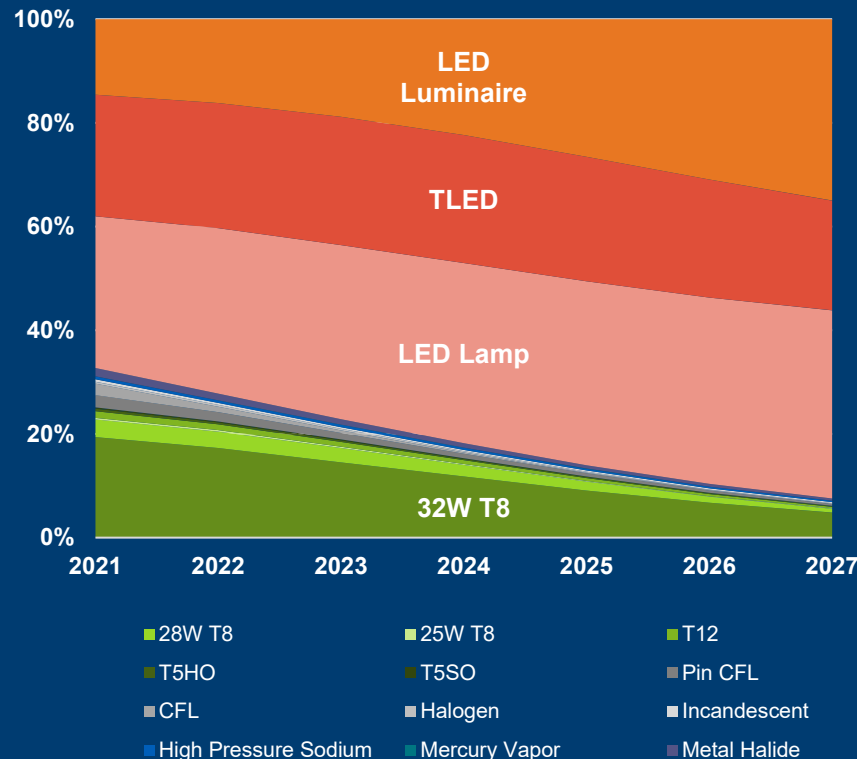
2025 Commercial Building Stock
Assessment (CBSA) data integration

Unit Energy Consumption (UEC)
inputs (wattage, hours of use, etc.)

Methodology refinements to capture
total market consumption and savings

Preliminary Stock Forecast 2022-2027 Model Period

Source: 2024 Interim Model Update – Preliminary results subject to change



Adjustable Speed Drives (ASD)

B O N N E V I L L E P O W E R A D M I N I S T R A T I O N



Current: ASD Delphi Panels

Study Overview

- Goal of validating and refining BPA's current model estimates for annual ASD stock saturation and market size in industrial sector
- Obtain feedback from ~25 market actors
- Feedback collected via individual interviews and group discussions

Progress Updates

- Finalized study design and materials
- Successfully completed pilot interviews with five market actors
- Continuing with recruitment and interviews

TIMELINE

Summer 2026

Conduct individual interviews and analyze responses

Fall 2026

Conduct group discussions and analyze responses

Finalize results

Winter 2026-27

Integrate into model

Publish memo in Jan.

Upcoming: ASD Market Model Update

Review and integration of NEEA Commercial Building Stock Assessment (CBSA) 2025 data for commercial sector model inputs

Review and integration of NEEA Motor System Stock Assessment (MSSA) 2027 data for industrial sector model inputs

Model calibration using ASD stock saturation and market size data from Delphi Panels

Integration of reported savings from regional utility programs and NEEA initiatives

Preliminary Forecast: Share of In-Service Industrial Fan Motors in Existing Stock that Already Have an ASD

Source: 2024 Interim Model Update – Preliminary results subject to change



Commercial HVAC



Upcoming: Explore Capturing Full Commercial HVAC Market

Background

- First model iteration only captured new construction and major renovations, not retrofits
- Not updating this model for 2022-2027

Research Objectives

- Explore innovative data streams for tracking commercial HVAC market holistically
- Undertake a series of data collection pilots and gather lessons learned and market intelligence

TIMELINE

Winter-Spring 2027

Market research and data collection pilot scoping

Summer-Fall 2027

Collect data

Generate insights

Inform/share results

2028

Determine viability for expanded model scope

Thank You for Attending

See you on Nov. 4

Contact

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Market Research Team, Energy Conservation, BPA

<https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings>

