

February 2026 Quarterly Call

Feb. 4, 2026

Momentum Savings & Market Research



Agenda

- **Team Introduction**
- **Roll Call + Ice Breaker**
- **2022-2024 Northwest Residential HVAC Sales Trends**
- **Wrap Up**

Team Introduction

- New Market Research Project Manager (Hope) started in January
- Team is now fully staffed and getting organized

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*



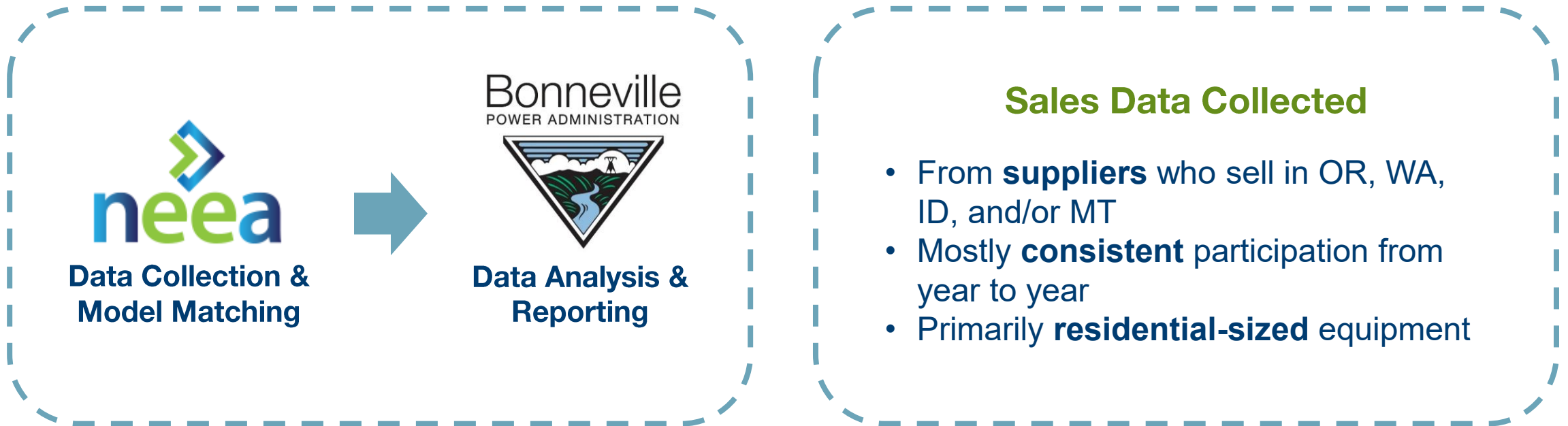
Org Name +
Answer This Question:

*What is your favorite
winter sport or activity?*

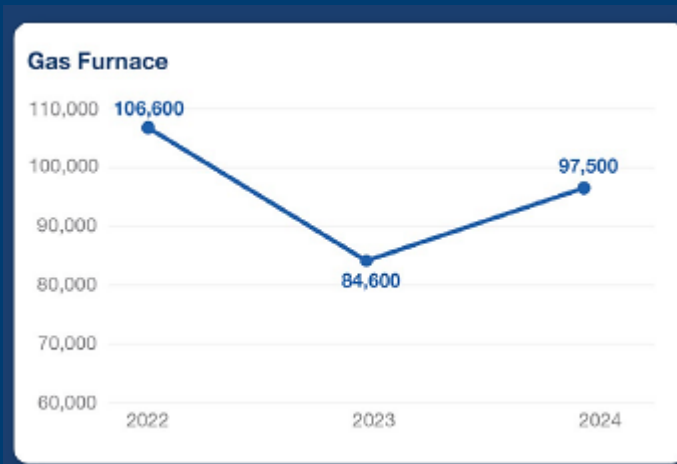
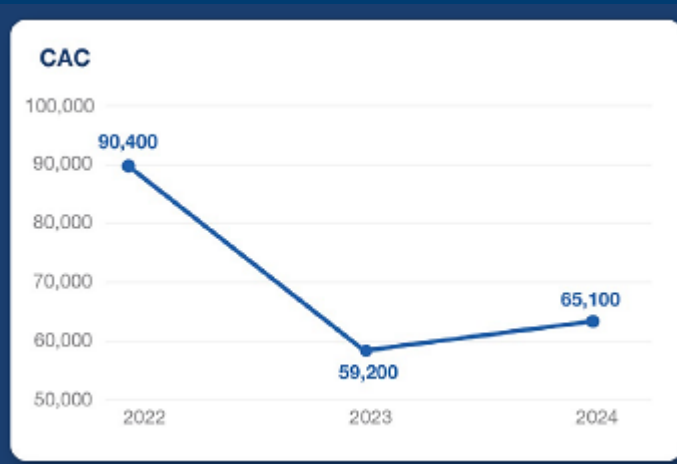
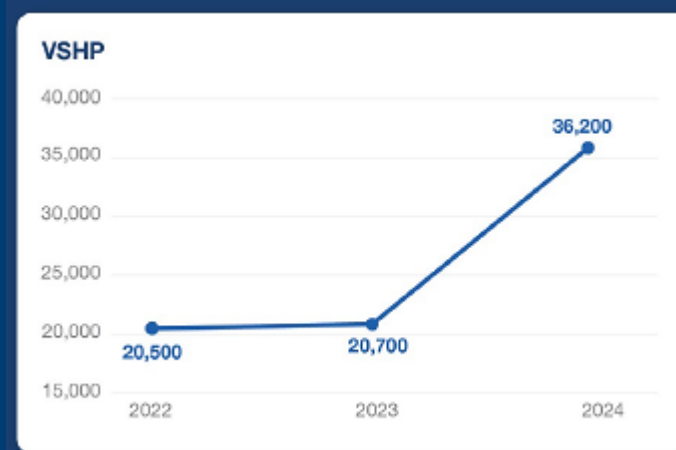
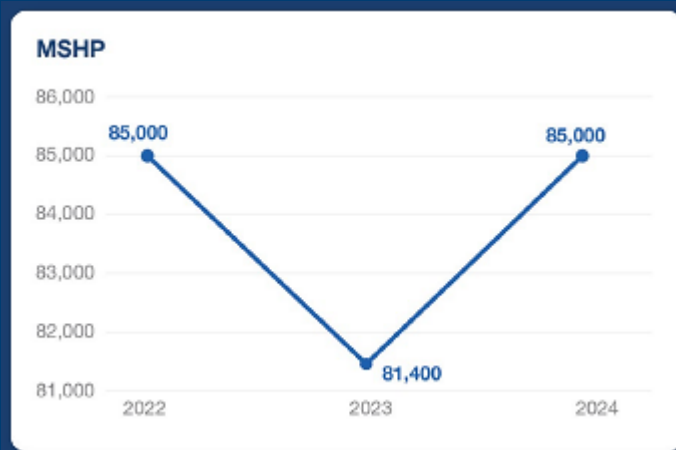
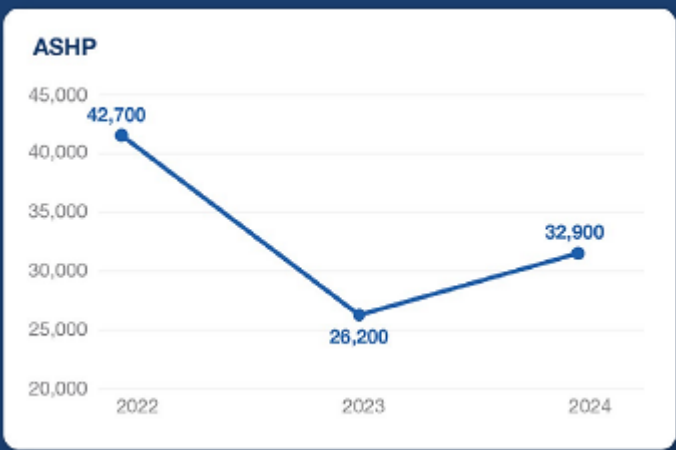
2022–2024 Northwest Residential HVAC Sales Trends



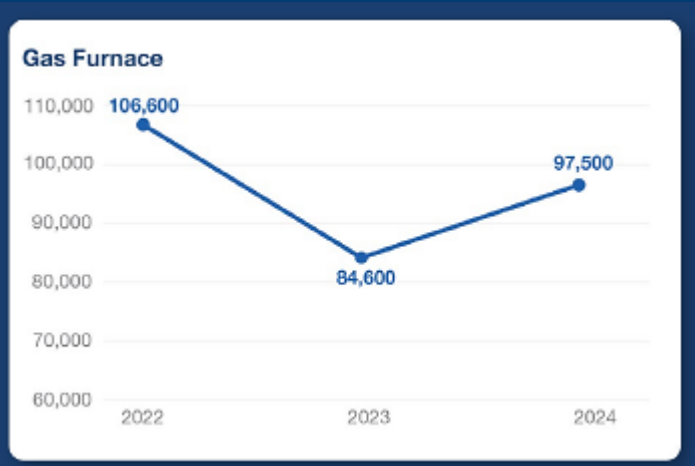
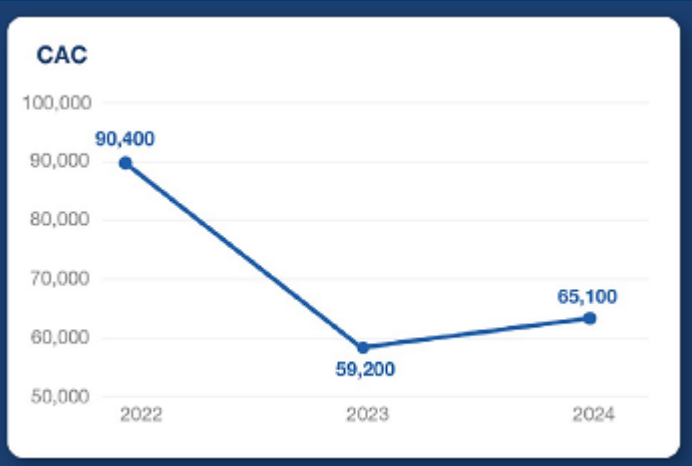
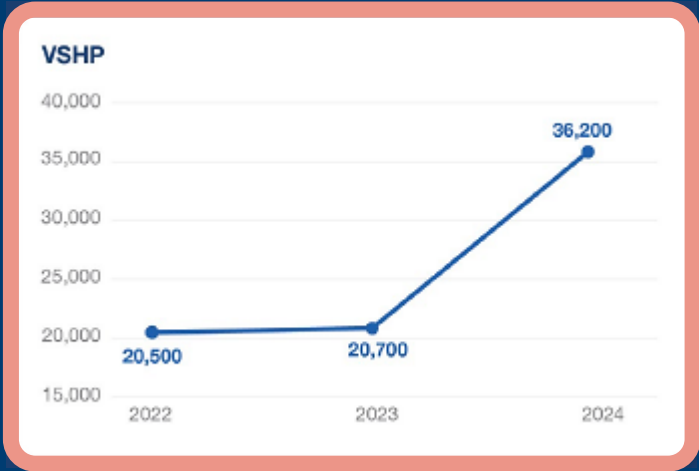
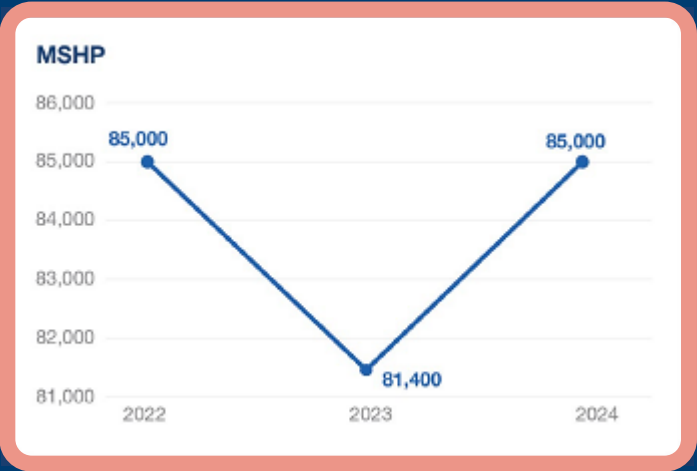
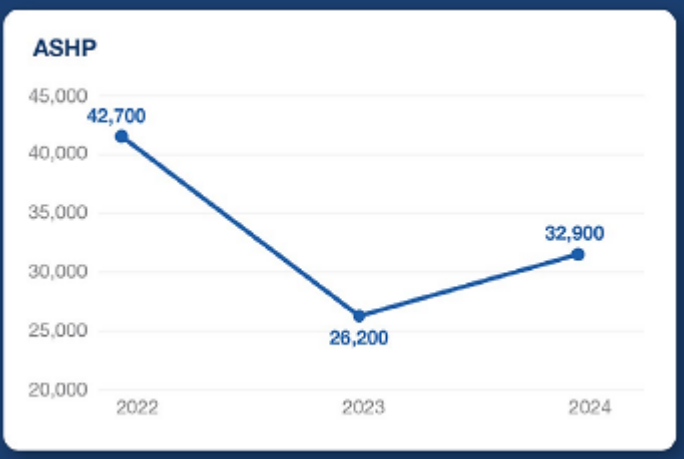
Annual Collaboration on HVAC Sales Data



Sales volumes **rebounded** in 2024 following the decline observed in 2023.

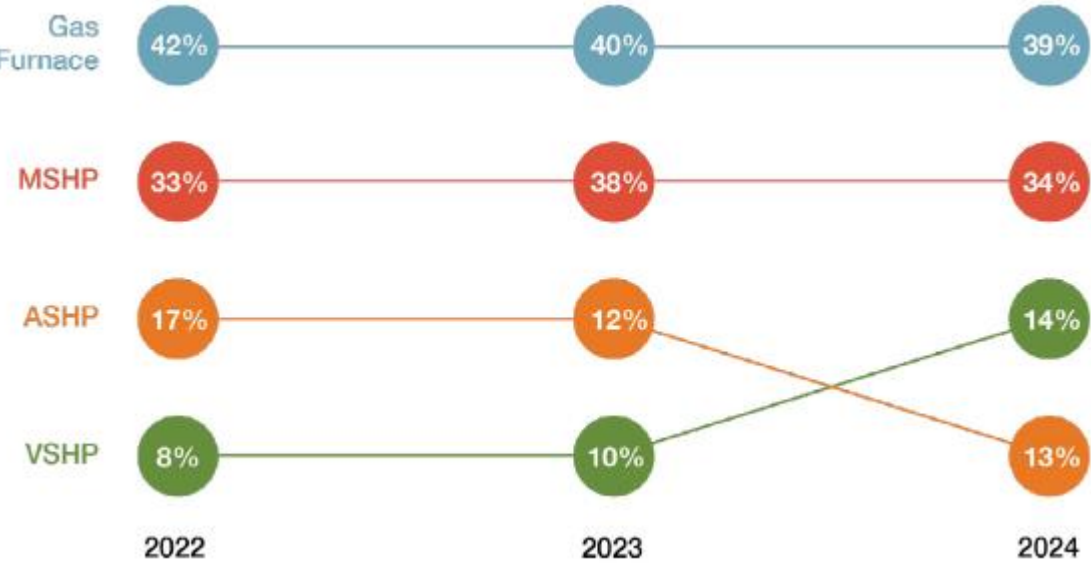


Inverter-based technologies experienced a stronger increase in sales from 2023 to 2024 than non-inverter systems.

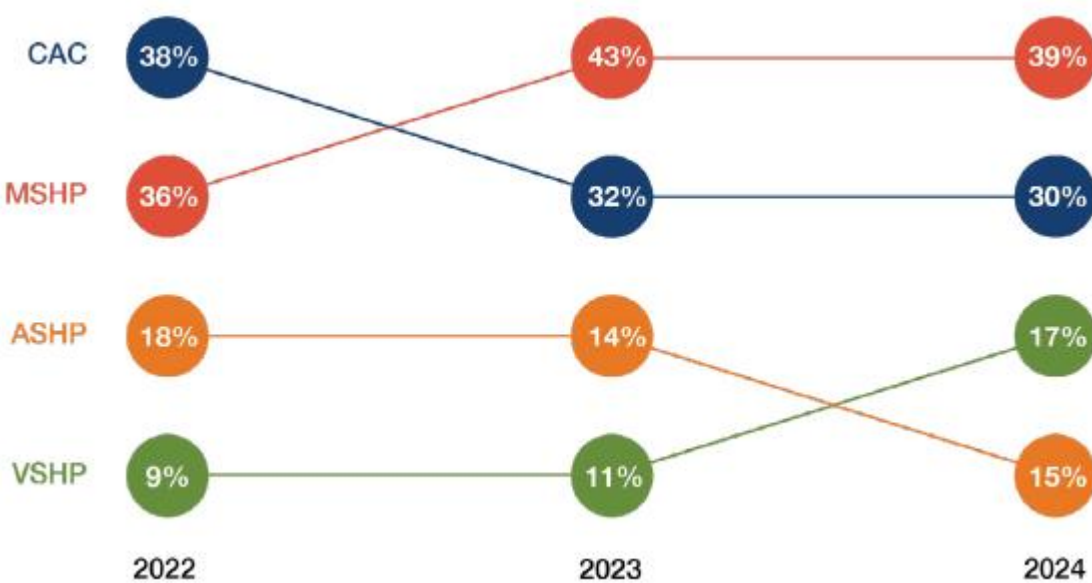


Combined heat pump sales exceeded gas furnaces and Central Air Conditioning (CACs).

Heating Technology Mix of Collected Sales Data Ranked

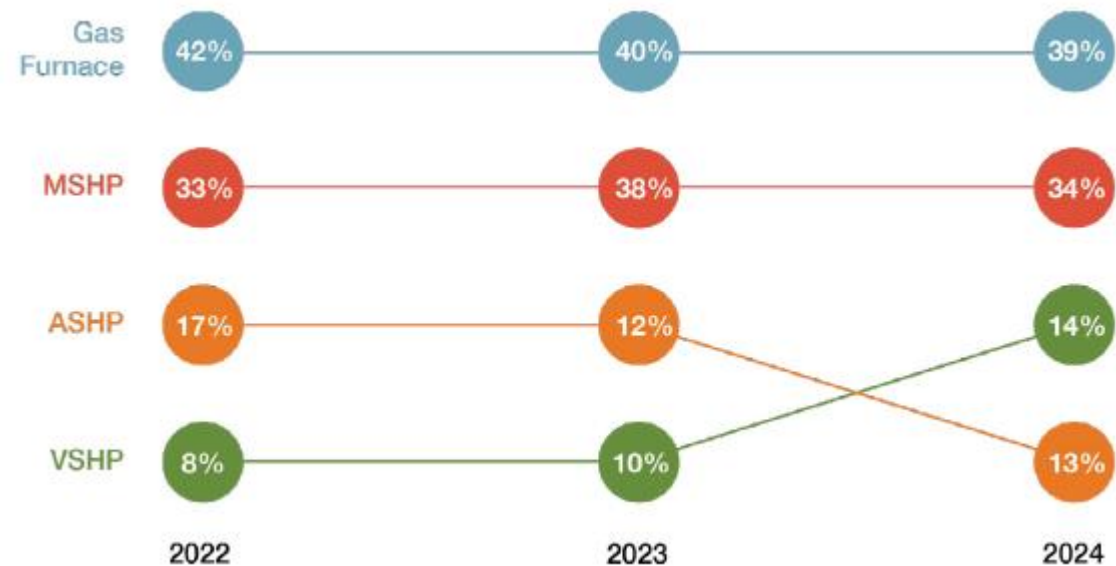


Cooling Technology Mix of Collected Sales Data Ranked

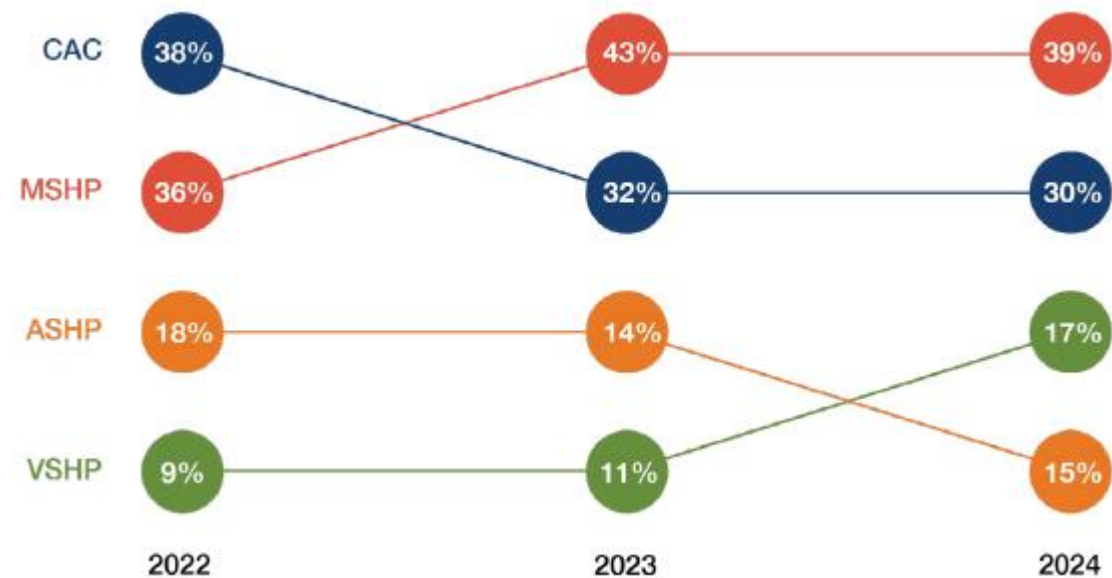


Mini-Split Heat Pumps (MSHPs) outselling CACs.

Heating Technology Mix of Collected Sales Data Ranked

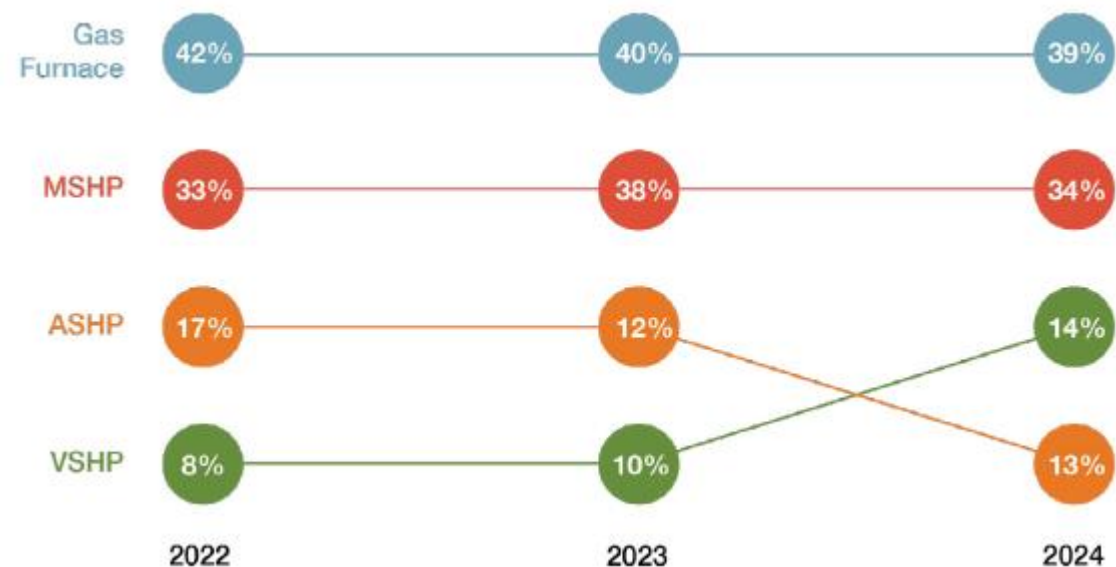


Cooling Technology Mix of Collected Sales Data Ranked

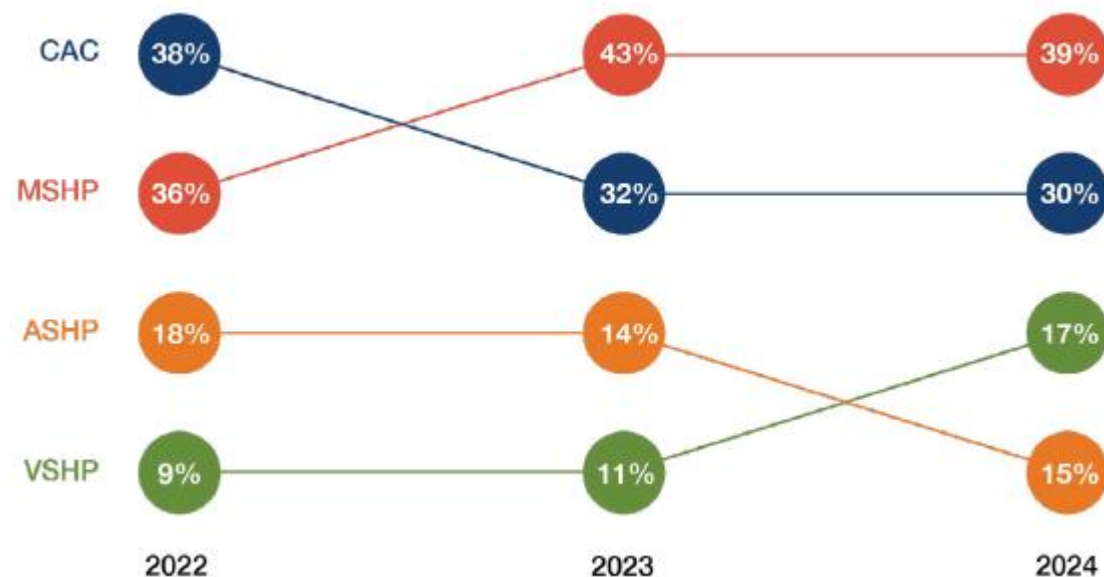


Variable Speed Heat Pump (VSHP) sales outnumbered Air Source Heat Pump (ASHP) (single- and two-stage) sales in 2024 for the first time.

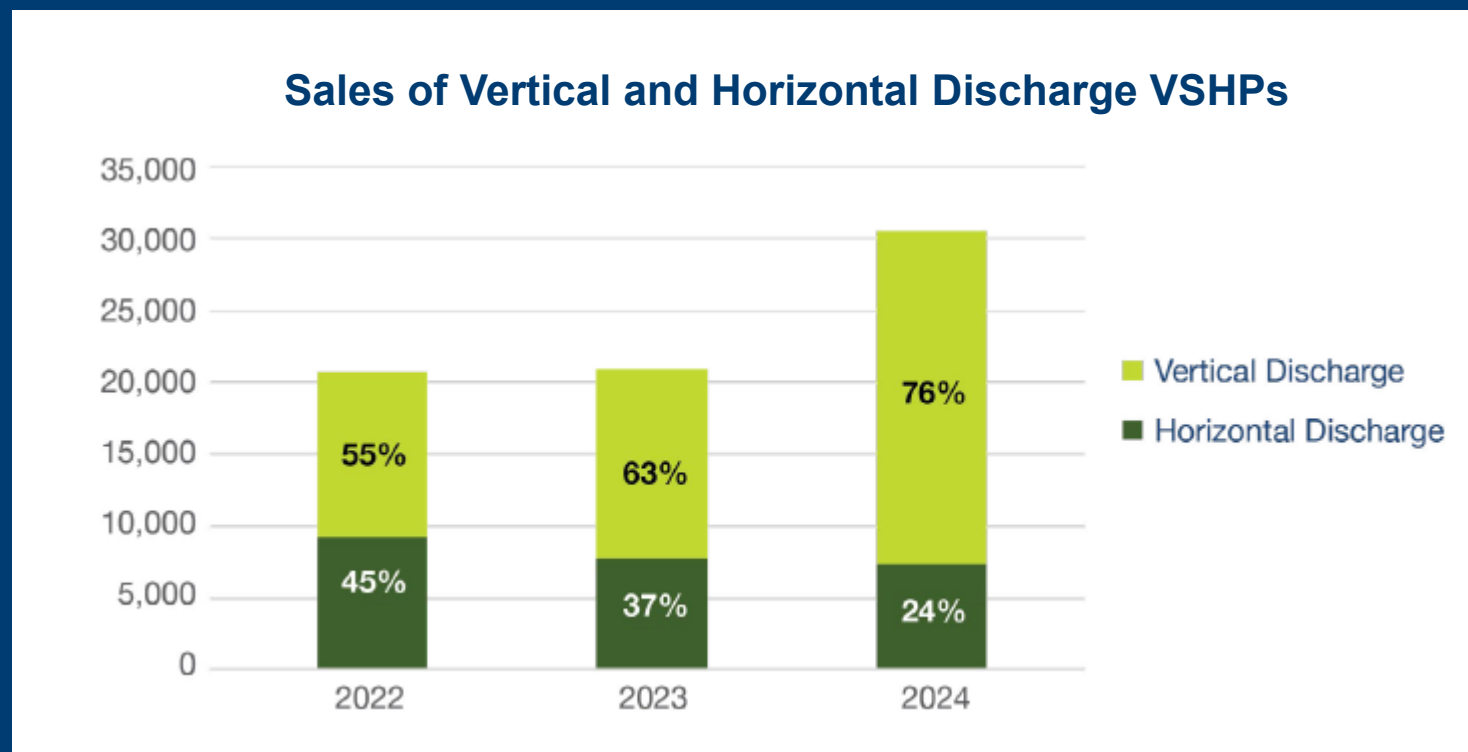
Heating Technology Mix of Collected Sales Data Ranked



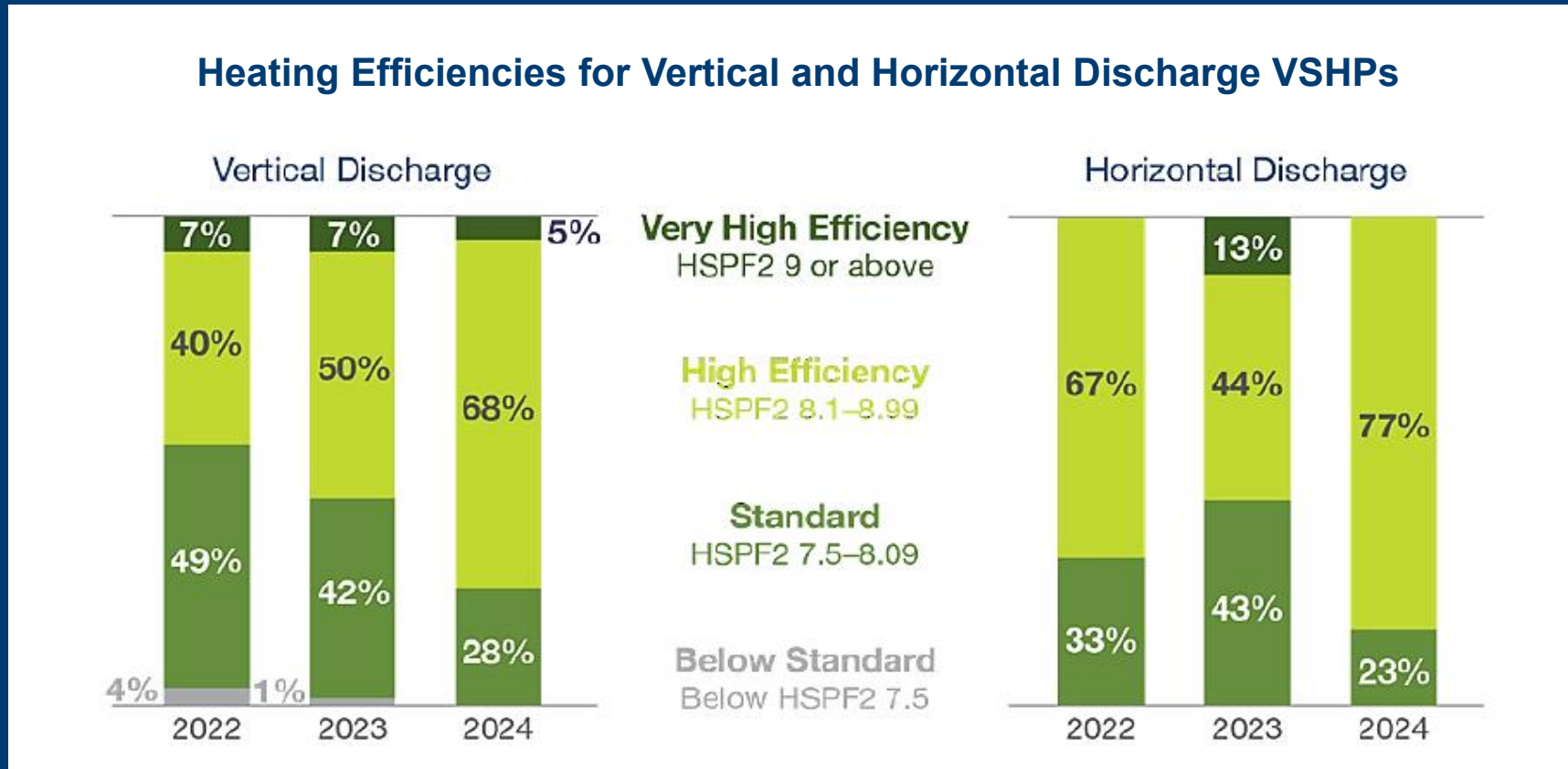
Cooling Technology Mix of Collected Sales Data Ranked



Vertical discharge VSHP sales nearly doubled from 2023 to 2024, while horizontal discharge VSHP sales remained relatively flat.

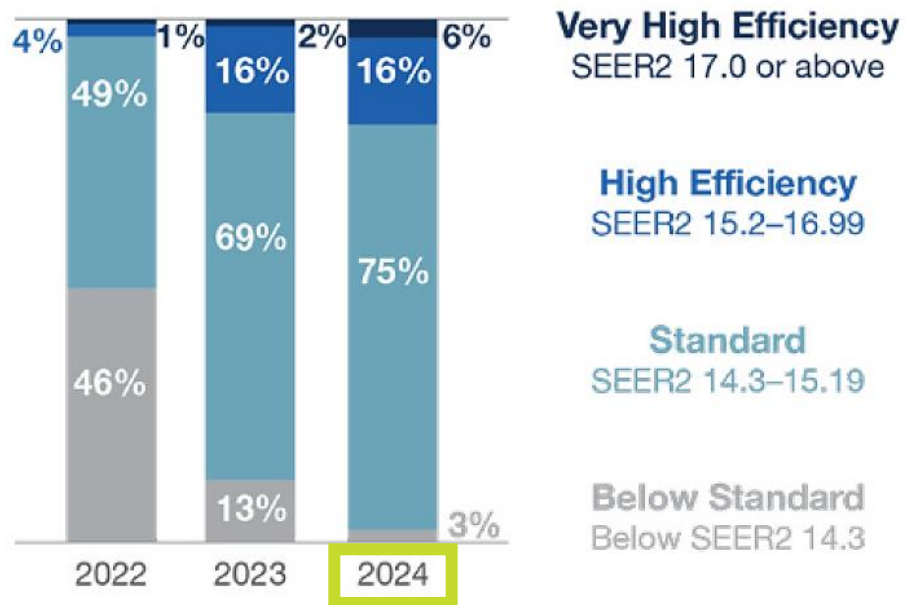


Similar heating efficiencies between vertical and horizontal discharge configurations.



ASHP and CAC cooling efficiencies continued to increase in **second year of new federal standards**.

ASHP Cooling Efficiency Levels



CAC Cooling Efficiency Levels



More HVAC Sales Info Available on BPA Website

**2022-2024 HVAC Sales
Insights Summary
available at**

[https://www.bpa.gov/-
/media/Aep/energy-
efficiency/momentum-
savings/2022-2024-hvac-sales-
insights.pdf](https://www.bpa.gov/-/media/Aep/energy-efficiency/momentum-savings/2022-2024-hvac-sales-insights.pdf)

**2022-2024 HVAC Sales
Data Spreadsheet
available at**

[https://www.bpa.gov/-
/media/Aep/energy-
efficiency/momentum-
savings/2022-2024-hvac-sales-
data.xlsx](https://www.bpa.gov/-/media/Aep/energy-efficiency/momentum-savings/2022-2024-hvac-sales-data.xlsx)

Thank You for Attending

See you May 6 at the next quarterly call

Contact

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

