

Momentum Savings

Market Research Update

November 2014

Read more about research updates, the new website and current Momentum Savings numbers.

New Webpage

We have a new webpage dedicated to Momentum Savings: www.bpa.gov/goto/MomentumSavings
If you have content suggestions or feedback, please share them with your EER.

New Videos

We have posted new videos of experts discussing Momentum Savings. The new webpage has links to Conduit posts with videos featuring Tom Eckman, Charlie Grist, Carrie Cobb and Rob Carmichael. Let us know of interviews you would like to see in the future!

Utility Roundtable Feedback

Thank you to utility roundtable participants for providing feedback on Momentum Savings. This feedback resulted in the following action items:

- (1) Determine a method for allocation to utility territory for the savings;**
- (2) Provide a quarterly update on the numbers and research; and**
- (3) Look at various new markets as resources allow.**

We are following up on #1, the allocation method, with a meeting in Seattle on January 28, 2015, where we will present options. We are following up with action item #2 via this newsletter. We are following up with action item #3 through our research planning over the next year, though we have a very full plate for 2015 and won't be able to add additional research projects.

Sales & Stock Data is used to determine Total Energy Savings



Programmatic is subtracted from Total Energy Savings



Only Momentum Savings are remaining.



Upcoming Meetings of Interest

Sales Data Market Sizing Working Session

December 2
Portland & online webinar

Standards Model Review Training

December 2 or December 3
Portland & online webinar

Scientific Irrigation Scheduling Population Definition & Sampling Strategy

December 11
Portland & video rooms in Walla Walla, WA & Spokane, WA

Allocation of Momentum Savings for Utilities (utilities only)

January 28 (all day)
Seattle & online webinar

LED Market Indicators Working Session

January TBD

For more information or to RSVP, please contact your EER or Carrie Cobb at clcobb@bpa.gov.

Momentum Savings

Project Updates



The same light for less power

Non-residential Lighting Market Characterization

We are currently in the field collecting sales data from distributors. Elaine Miller from NEEA has been critical in working with BPA and the distributors to facilitate the data request. Jacob Henry from Grays Harbor PUD helped us identify and recruit a niche distributor who has broadened our market understanding in industrial. Below are a few highlights of the distributor data collection:

Early signs indicate we will have increased distributor participation

Most distributors are unable to provide branch level information

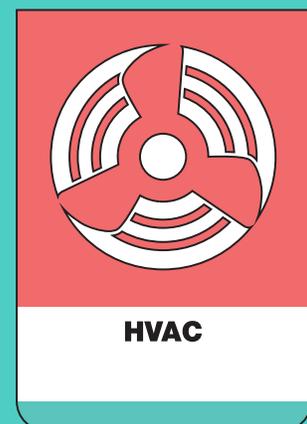
The rapid increase of LED products has made collection much more difficult than last year as the data require more cleaning. This will likely slow the final timeline

BPA will have a working session in January 2015 for the LED Market Indicators Report in order to identify ways in which this report can help program implementers understand the market dynamics of LEDs to inform program design. Please let your EER know if you would like to attend or want more information.

HVAC Market Characterization

We are interviewing HVAC distributors and collecting HVAC sales data. Building on our previous success with lighting distributors, program staff have been working to strengthen relationships with these critical market players. Jim Bellamy from Peninsula Light and Rick Hodges from BPA have been instrumental in the effort to reach out to distributors.

Our timeline has been pushed back for final results. We discovered that existing commercial building simulation models will not be adequate for estimating Momentum Savings. Therefore, we need to build these models which will add additional time to the analysis. We anticipate having residential savings drafts in late February or early March 2015 and commercial estimates in the Spring of 2015.



Momentum Savings

Project Updates

Momentum Savings Methodology

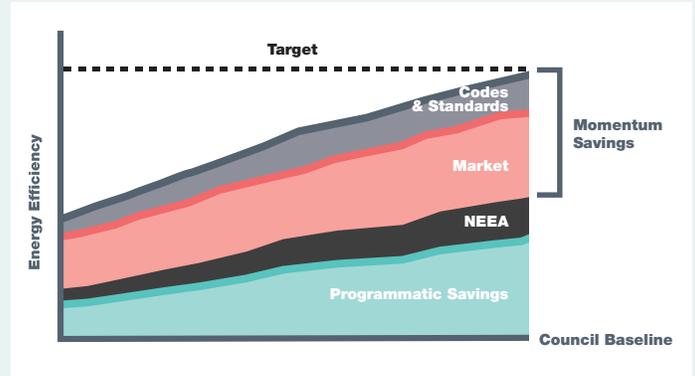
We have modified the project to include developing a method to allocate savings by utility. We also will develop a more comprehensive approach for estimating market size using sales data; develop a methodology for estimating weatherization savings; and track consumer electronics that are not tracked by NEEA.

There will be a meeting in Seattle on January 28, 2015 to discuss the allocation of Momentum Savings to utilities. Please RSVP by December 12, 2014 by emailing clcobb@bpa.gov so we can ensure we have sufficient space.



Appliance Standards

Draft models for multiple new products and a re-do of the template for most models is nearly complete. On December 2-3, 2014 there will be two training sessions to summarize the model format and explain the review process, which will occur over the next two months. Interested stakeholders can contact Carrie Cobb or your EER to attend one of these trainings. There will also be a user guide developed to maximize usability of the models.



Improving product flow data with NEEA

NEEA & BPA have been partnering to improve regional sales data collection. We are currently following up with multiple retailers and manufacturers to obtain data sufficient for us to improve our baseline data and track the efficiency outside of direct program incentives. Jill Bach at NEEA has been leading this effort. Slides from a recent brownbag are posted on the Momentum Savings page. If you want more information, please contact Jill Bach at NEEA at 503.688.5473 or jbach@neea.org.



Momentum Savings

Market Research & Update

Table 1: Momentum Savings, BPA territory, actuals reported as of 11/11/2014

	One time adjustment	2010	2011	2012	2013	2014	2015
Total Momentum with NEEA reported		18.15	25.80	39.74	4.10	3.89	11.58
Total Momentum without NEEA reported		5.20	12.13	24.16	4.10	3.89	11.58
	37						
NEEA REPORTED							
NEEA reported Momentum Savings, BPA Calculated*		12.96	13.67	15.58			
STANDARDS							
Commercial Washer (MF Common Area)		-	-	-	0.15	0.15	0.16
Commercial Washer (Laundromat)		-	-	-	0.07	0.08	0.11
Illuminated Exit Signs		-	-	-	-	-	-
Pre-rinse Spray Valves		-	-	-	-	-	-
Commercial Refrigeration Equipments		-	-	-	-	-	-
Walk-in Cooler and Freezers		0.06	0.11	0.16	0.19	0.20	0.21
Electric Motors		-	0.06	0.06	0.06	0.06	0.06
Distribution Transformers		3.30	3.22	3.10	3.07	3.09	3.08
CAC Air-Cooled		-	-	-	-	-	-
CAC Water Evap Cooled		-	-	-	-	0.00	0.00
PTAC/HP		0.01	0.01	0.01	0.01	0.01	0.01
Res Dishwasher		-	-	-	-	-	-
Res Refrigerators		-	-	-	-	-	-
Res Freezers		-	-	-	-	-	0.61
External Power Supplies		-	-	-	-	-	-
Res Clothes Washers		-	-	-	-	-	-
Res Water Heaters		-	-	-	-	-	6.51
Ceiling Fan Kits		0.25	0.26	0.26	0.27	0.27	0.26
Torchieres		0.28	0.29	0.29	0.30	0.03	0.03
Heat Pump		-	-	-	-	-	0.55
NON-RESIDENTIAL LIGHTING							
Non-residential lighting		1.29	8.02	19.93			
BASELINE ADJUSTMENT SAVINGS							
Clothes Washers		-	0.15	0.28			
Air Source Heat Pumps		-	-	0.06			
Refrigerators		-	0.01	0.01			

Table is for 42% of regional savings; NEEA reported savings are based on funding share for NEEA. Future research could improve on data collected, which could revise these estimates. Baseline adjustment savings are for BPA-reported measures in contrast to the 6th Plan baseline and may not be appropriate for all utilities. Savings are adjusted for busbar.

*BPA calculation of NEEA reported 6th Plan savings

For more about Momentum Savings, contact Carrie Cobb at clcobb@bpa.gov.