One Size Does Not Fit All: An Assessment of NEEA’s Midstream RPP Efforts

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Midstream Introduction
First, a big THANK YOU

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- Other NEEA staff (Christine Steinhoff, Beth Littlehales, Nick Leritz)
- Other Apex staff (Lauren Gage)
BACKGROUND
Background

- What is RPP?
- Who is NEEA?
- What makes NEEA's RPP unique?
- Who is Apex and why our role in this effort?
## Background

<table>
<thead>
<tr>
<th>Refrigerator</th>
<th>Clothes washers</th>
<th>Room air cleaners</th>
<th>Soundbars</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refrigerator" /></td>
<td><img src="image" alt="Clothes washer" /></td>
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<tr>
<td>Freezers</td>
<td>Clothes dryers</td>
<td>Room air conditioner</td>
<td>Ultra-HD televisions</td>
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<td><img src="image" alt="Freezer" /></td>
<td><img src="image" alt="Clothes dryer" /></td>
<td><img src="image" alt="Room air conditioner" /></td>
<td><img src="image" alt="Ultra-HD television" /></td>
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</tbody>
</table>
Strategies

- Midstream Incentives
- Specification Revision
- Standards
- Measurement & Compliance
- Emerging Technology
- Tracking
APPROACH
Overall Methodology

- Document Review
- Interviews
- Market Research & Analysis
- Market Assessment
- Strategy Assessment
- Baseline Review
FINDINGS
Product Findings

Market Segmentation

- Type/configuration
- Energy consumption
- New EE technologies
- Pricing
- Market share

Efficient/ENERGY STAR Market Share

- Market share trends
- Likelihood
- Exceed requirements?
- Metrics vs energy consumption
Refrigerator example

Refrigerator ESME Market Share

ESME Market Share

- Bottom
- Side
- Top
- Overall

Date:
- 1/1/2015
- 3/1/2015
- 5/1/2015
- 7/1/2015
- 9/1/2015
- 1/1/2016
- 3/1/2016
- 5/1/2016
- 7/1/2016
- 9/1/2016
- 1/1/2017
- 3/1/2017
- 5/1/2017
- 7/1/2017
- 9/1/2017
- 1/1/2018
- 3/1/2018
- 5/1/2018
- 7/1/2018
- 9/1/2018
Market Conditions dictate NEEAs strategies

Strategies: Short term

- Measurement & Compliance
  - No
  - Yes

- EE products identifiable
  - Yes

- EE market share
  - High/Growing
    - No
    - Yes
      - Opportunity to advance standards
        - No
        - Yes
          - Technology exceed EE specs
            - No
            - Yes
              - Specification Advancement
                - No
                - Yes

  - Low/Stagnant
    - No

- EE products availability
  - No
  - Yes
    - Midstream Incentives
      - No
      - Yes
        - Emerging Technology
          - No
          - Yes
            - Tracking
Strategies – Long term

Strategies Evolve Over Product Lifecycle

Incentives

- Measurement & Compliance
- ENERGY STAR spec revision
- Emerging Tech

Increased EE market share

Standards
Baselines represent market share of non-intervention
Baselines

Shelf life, turnover determines lag period

![Graph showing market share trends with pre-period, intervention lag-period, and post-period phases. The baseline is indicated as based on 2015-2016 shares.](image-url)
**Current political uncertainty**
CLOSING
Key Takeaways

▪ Specific market conditions required for midstream incentives
▪ Proactive planning for a market transformation-focused evaluation
▪ Product configurations often critical to select intervention strategies
▪ Measurement & compliance critical to the success of all other intervention strategies
▪ An abundance of data != cohesive findings
Forget Midstream – go UPHILL!
For more information

- Review the IEPEC paper

- Read the full report:
  

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Questions?