

Magnetic Appeal: Understanding the Forces Behind California's Induction Cooking Technology Adoption



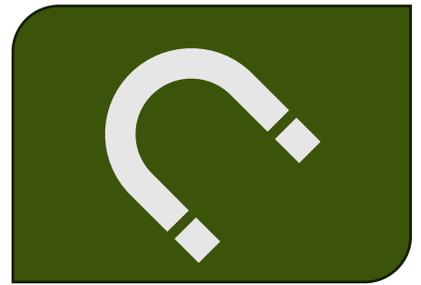
**2025 International Energy
Program Evaluation
Conference
October 8, 2025**



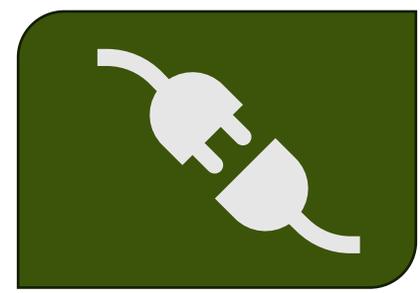
Julia Mycek
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Background

Induction



Non-induction Electric



Gas



Induction Cooking Matters



Advantages

Key tech for residential decarbonization

More energy efficient

Enhances indoor air quality

Heats up faster

Concerns



Cultural preferences

Incompatible w/ existing cookware

Rising costs of electricity

Doesn't work in power outage

Research Objectives

1

Understand trends in California markets

2

Identify key drivers and barriers

3

Forecast market growth through 2030

Limitations and Considerations



**COVID-19
Impact**



**Data
Coverage**



**Geographic
Exclusions**



**Uncertainty
of Federal
Funding**

Research Objective 1



California Market Adoption Trends

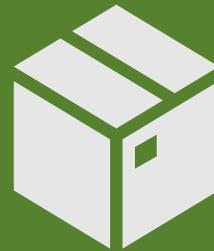
Methodology - Data and Scope



Circana →
Appliance
sales data



Jan. 2020 –
Dec. 2023



Cooktops &
Ranges



Induction,
Non-
Induction
Electric &
Gas



California
Designated
Market
Areas
(DMA)

California Market Adoption Trends

Market Share



Heating UP!

Cooktops

Induction = Increased
Electric/gas = Decreased

Ranges

Induction = Increased
Gas = Decreased
Electric = Increased

Key Insight:
Induction cooktops
showing stronger
adoption
momentum than
induction ranges

California Market Adoption Trends - Regional Adoption Patterns



Induction Units Sold per Household (2020– 2023)



Regional Insights:

- All major Designated Market Areas show increasing per HH adoption
- San Diego has the highest adoption rate

Research Objective 2



Key Drivers and Barriers of Uptake in California

Methodology– Two Complementary Regression Models

Baseline Model (California) Fuel-Type Model (Designated Market Area- Level)

- Total Monthly Unit Sales
- Tech & Fuel Type Controls
- GDP, electricity rates, prices
- R-squared = 0.79

- Separate models by fuel type
- Additional policy variables
- Avg therm rates, reach codes and incentives
- R-squared = 0.79– 0.95

Drivers and Barriers of Induction Adoption

Drivers



GDP

Reach code Count
Incentive Amount

Barriers



Average kWh
Rate



Key Finding: Price
sensitivity appears
lower for induction
buyers

Research Objective 3



Forecasting California Market Growth Through 2030

Methodology – Forecasting Assumptions



GDP



**Average
kWh and
therm rates**



**Reach Code
Count**

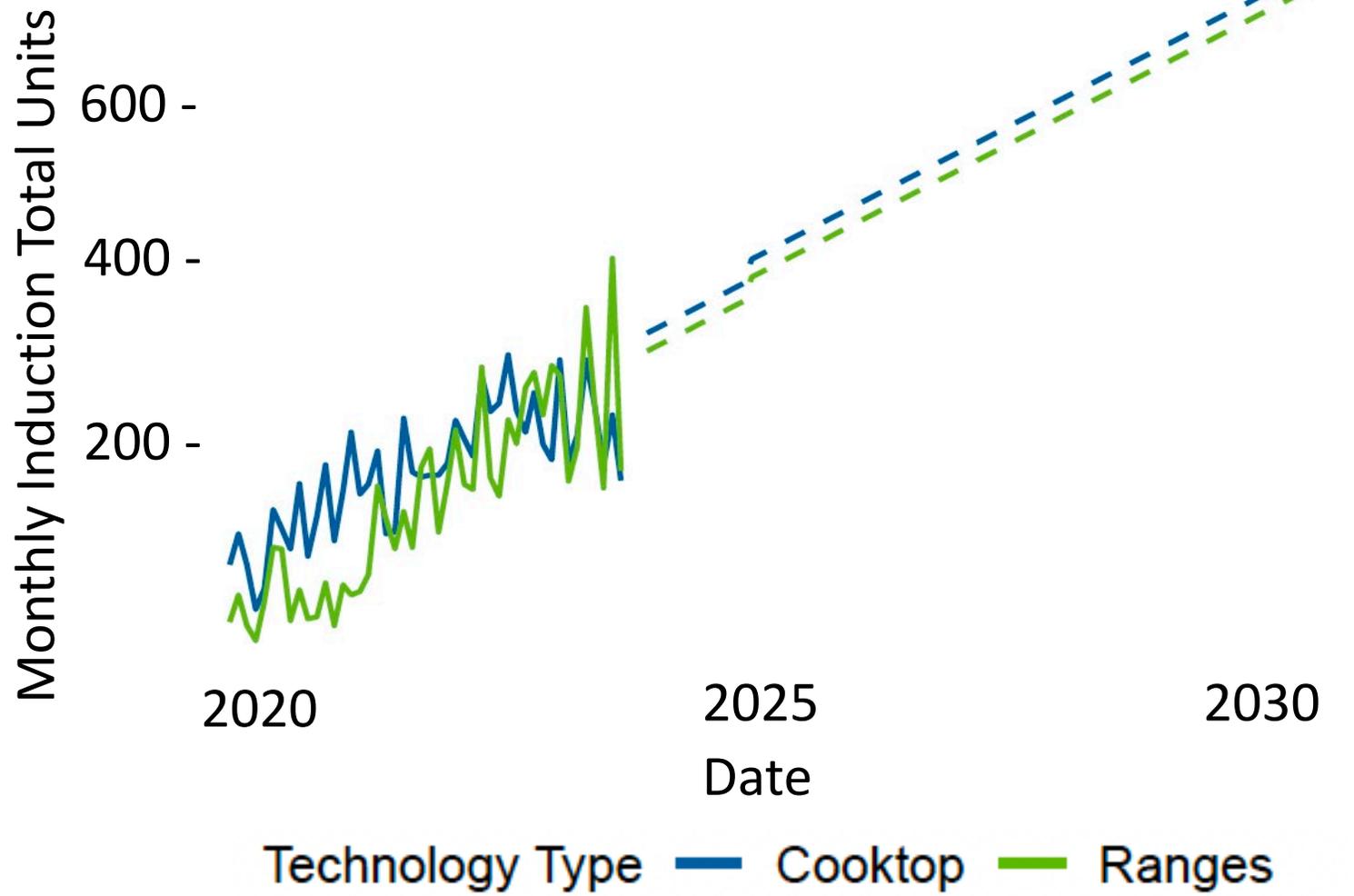


**Incentive
Amount**



**Average
Price**

Forecasting California Market Growth Through 2030



Monthly Induction Sales:
716 cooktops/month
699 ranges/month

Forecasting California Market Growth Through 2030



Cumulative Market Growth from 2024-2030

Cooktops	Ranges
~37,000 Total	~48,000 Total
23% Market Share	5% Market Share

Key Finding:
Natural market growth alone is insufficient for large-scale gas displacement by 2030

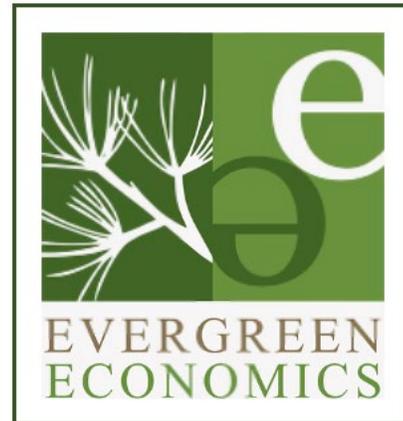
Key Takeaways

- 1 More people buy induction cooktops than ranges
- 2 Early adopters care less about price
- 3 Policy and incentives boost adoption

Acknowledgements



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