

2020 Q2

Market Planning Quarterly Report

IMPORTANT UPDATES:



What's New!

Hello CEAC members,

Our 2020 Q2 Market Planning Quarterly Report contains the final key assumptions updates for the 2019 Annual Reporting period. NEEA reports on key assumption changes every quarter as part of the standing agenda with CEAC. As a part of the Quarterly Report, we provide the full set of assumptions that NEEA staff are employing in the reporting of savings. This full list is found in the two links below the Table of Contents. The links will direct you to the NEEA Baseline Regional Key Assumptions workbook and The Seventh Power Plan Baseline Regional Key Assumptions workbook posted to our NEEA Funder Portal.

The NEEA Funder Portal houses reference materials, informational presentations, and other regional documentations. All of these materials can be accessed by creating an account at:

<https://neea.org/portal/sign-in>

We hope this portal can provide easier access to our work and if you have any suggestions for the portal or issues accessing the portal, please email Kyle Billeci at kbilleci@neea.org

Hope you all stay healthy and safe!

TABLE OF CONTENTS

At a Glance	2
Integrated Systems	3
Products	5
Codes & Standards	6
Natural Gas	7
Contacts	8

NEEA Baseline Regional Key Assumptions:

<https://neea.org/portal/savings-reports/2019-nee-key-assumptions-regional-report>

Seventh Power Plan Baseline Regional Key Assumptions:

<https://neea.org/portal/savings-reports/2019-seventh-power-plan-key-assumptions-regional-report>

Questions about this report may be addressed to:



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At a Glance

MARKET PLANNING KEY ASSUMPTIONS UPDATES

Integrated Systems



Desktop Power Supplies



Residential Lighting



Ductless Heat Pumps



Products



Retail Product Portfolio



Super-Efficient Dryers



Codes & Standards



Commercial Codes



Natural Gas



Condensing Rooftop Units



Residential New Construction



Update Type:

Units

Savings
Rate

Calculation
Approach



Integrated Systems

UPDATES

Desktop Power Supplies

NEEA will report co-created and Seventh Power Plan savings associated with ENERGY STAR Version 7 for computers beginning in 2019. The Seventh Power Plan does not provide a savings rate for this efficiency tier. When a rate is not provided by the Plan, NEEA calculates one using the best and most recent data available. In this case, NEEA combined 2019 technical product research by Xergy Consulting with the Seventh Power Plan baseline market shares to develop a savings rate for ENERGY STAR Version 7 commercial desktop computers. This also necessitated an update to the rate for Version 6 (resulting in an additional 0.3 aMW for 2016-2018 annually). The Council reviewed and agreed to these updates in February 2020. The methodology behind this calculation is included in the April 2020 CEAC meeting packet and located on NEEA's [Portal](#)

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Residential Lighting

Final residential lighting market data analysis will not be available until late April. NEEA will update our estimates as soon as possible, but until then, NEEA has utilized trends observed in the raw data sources (shelf stocking survey data and Nielsen point-of-sale data) to preliminarily update the technology market shares for 2019.

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Integrated Systems

UPDATES

Ductless Heat Pumps

NEEA has developed an extrapolation methodology that utilizes data from a sample of HVAC distributors to estimate the total sales of DHP systems in the region. This update replaces an interim method that relied primarily on local utility program data to project market trends and leads to an increase in NEEA's estimate of the total DHP installations in the region.

As we shared in February, NEEA has also incorporated recently updated RTF savings rates for DHPs in single-family zonal applications. In order to be in alignment with the new rates, NEEA has updated our accounting method for non-incented DHPs displacing zonal heating to include installations outside of the primary living space.

Both of these methodology updates have been reviewed by Ecotope as part of the DHP ACE Model review in February 2020.

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Products

UPDATES

Retail Product Portfolio

In preparation for the Retail Products Portfolio entering Market Development, Apex Analytics as well as the Regional Technical Forum's Market Analysis Subcommittee reviewed the technical and baseline assumptions necessary for NEEA to report energy savings. The review led to:

1. A new method to extrapolate program sales to the region
(will be addressed in April 2020 CEAC presentation)
2. Adjustments to NEEA's baseline assumptions
(will be addressed in April 2020 CEAC presentation)
3. A decrease in the Room Air Conditioner Unit Energy Savings estimate to account for hours of use being less than central air conditioning

In addition, NEEA received updated historical data from its program. Overall, the 2015-2018 Co-created savings did not change. However, the Seventh Power Plan Remaining Savings increased by 0.3 aMW primarily because NEEA added the ENERGY STAR 2018 Most Efficient clothes washer measure to 2018.

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Super-Efficient Dryers

NEEA is now utilizing the same extrapolation methodology as the Retail Products Portfolio to estimate the total sales of dryers in the region. This method was reviewed by Apex Analytics as well as the Regional Technical Forum's Market Analysis Subcommittee.

Heat Pump Hybrid dryer manufacturers did not share shipment data with NEEA in 2019 as they had in prior years. These products do show up in the Retail Product Portfolio data platform so their sales have been estimated using market shares from that data source as well as reporting from local utility programs. NEEA will assess options to improve future data availability for these products during 2020.

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Codes & Standards

UPDATES

Commercial Codes

Idaho's 2015 IECC for Commercial buildings became effective in January 2018. NEEA calculated its savings rates by comparing the building energy performance of the 2012 IECC and 2015 IECC, produced by Pacific Northwest National Laboratory (PNNL). To reflect the savings for the state of Idaho, NEEA used the energy performance outputs of climate zones 5b (Boise) and 6b (Helena).

The methodology for this update can be found on NEEA's [Portal](#)

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Natural Gas

UPDATES (FROM Q1 2020)

Condensing Rooftop Units (CRTU)

NEEA is including savings from the 8 site field trials for condensing rooftop units. These sites were each monitored closely for several months and were visited again in 2019 to verify that the equipment was still in place and operating at the same level of efficiency.

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Residential New Construction

NEEA contracts with TRC to supply energy savings estimates for utility Performance Path programs as well as voluntary home certification programs (National ENERGY STAR, HERS/RESNET, Built Green King/Snohomish and Tri-Cities, National Green Building Survey, Earth Advantage, and The Energy Trust of Oregon's Energy Performance Score). NEEA also contracts with Energy 350 to complete an evaluation of TRC's methodology and estimates each year prior to annual reporting. This data source and review process has been utilized for electric savings since 2018 (for 2017 annual reporting) and will now also be used for natural gas savings reporting.

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TOGETHER We Are Transforming the Northwest

