



Products Coordinating Committee

Q4 2024 Meeting – Day 1

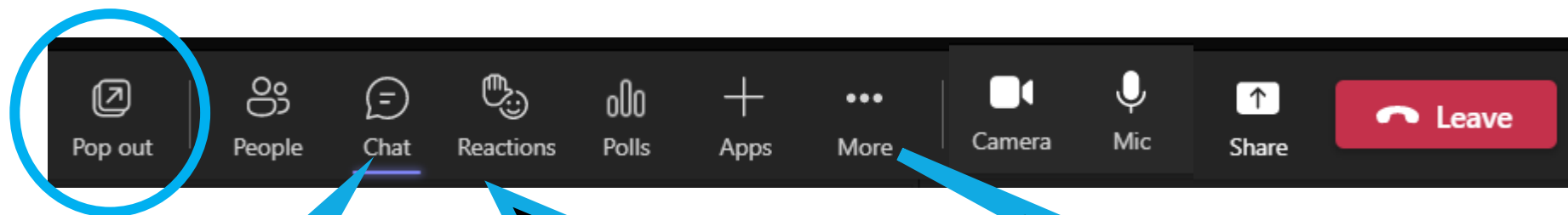
Tuesday December 3, 2024

1:00 pm, Pacific Time





Tools for Today: Engaging on Teams



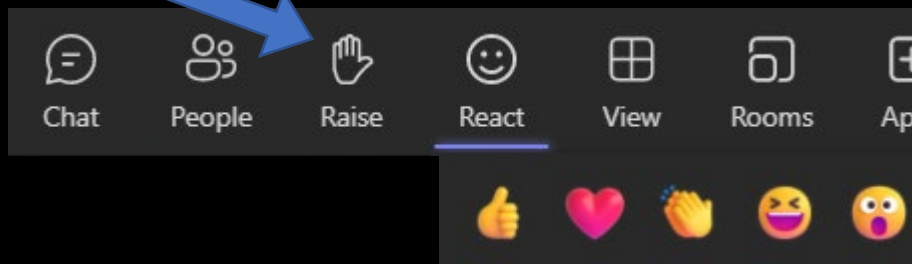
The chat is not captured in the recording.

Do you have any accessibility challenges with this technology today?



Comments/Questions?

Please raise your virtual hand or chime in
Chat & reactions also welcome



“...” More includes:

- ✓ Settings: mic & video
- ✓ Background effects

Heads up:

“Spotlighting” Speakers





Collective Role – Working Together

- **Share your organization's activities**
- **Come prepared to actively participate**
- **Be transparent**
- **Identify any potential conflicts/challenges**
- **Flag any potential opportunities to leverage**
- **Be present in the conversation and stay flexible**

AGENDA

(All Times Pacific)

1:00 – 1:15	Welcome, Agenda, Packet Review
1:15 - 2:35	Introductions & Regional Roundtable
2:35 – 2:45	BREAK
2:45 – 3:45	Regional Priority Topic – Consumer Products, Retail Products Portfolio <ul style="list-style-type: none"><i>NEEA insights on affordability with regards to clothes washers and refrigerators</i>
3:45 – 3:55	Housekeeping
3:55 – 4:00	Recap, Next Steps, Adjourn

Packet Review & Informational Updates

- **Tier 1: Agenda Items**

- Regional Priority Topic: Retail Products Portfolio (pg. 5)
- Annual Planning Memo (pg. 6)

- **Tier 2: Informational Items**

- Regional Marketplace Memo (pg. 7)
- Ductless Heat Pump Long Term Monitoring and Tracking Outreach (pg. 8)

- **Program Activity Reports**

- Advanced Heat Pumps (pg. 11-14)
- Heat Pump Water Heaters (pg. 15-18)
- Consumer Products Retail Products Portfolio (pg. 19-21)

- **Tier 3: Additional Resources** (links on pg. 3)

Committee materials (charters & recent meeting resources, functional newsletters (Market Research & Eval, Emerg Tech, Codes + Standards + New Construction)



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Introductions + Committee Roundtable



Introduction Prompt *(All)*

- Name
- Organization
- *And...*



Roundtable Focus *(NEEA PMs & PCC members)*

- Highlights since Q3 of 2024
 - Programmatic updates
 - Organizational updates



Please aim for 3-5 min max, thanks!

Let's take BREAK!



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Clothes Washer/Refrigerator Affordability

Anne Brink

Program Manager RPP

December 3, 2024



Agenda

- Background on analysis project
- Refrigerators findings
- Clothes Washer findings
- Committee Discussion

How are we looking at affordability

1. Do cost conscious consumers have efficient options in their consideration set?
2. What features enable efficiency and does that correlate to an increase in unit price?
3. Are there opportunities within program design to address the availability of ENERGY STAR units at price parity with non-qualifying?

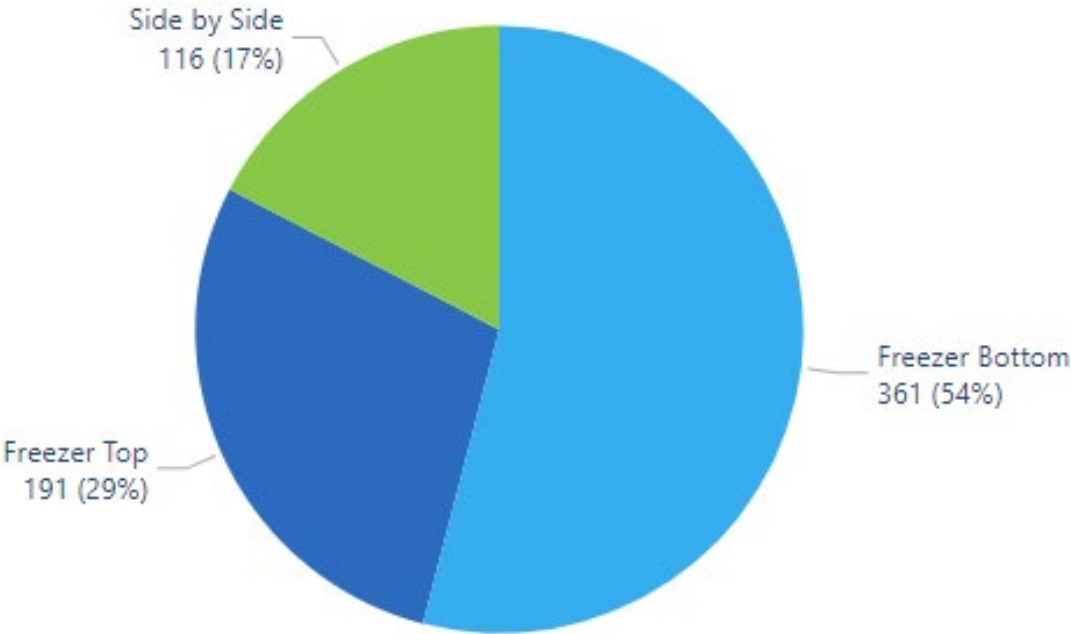
Background on Analysis

- Exploratory analysis to articulate the affordability of efficient appliances
- Using early version of a web-scraped dataset still under development
 - Home Depot and Lowe's data
- This analysis reviews promotional pricing not regular pricing

Refrigerators >10 Cu. Ft.

Configuration	Lowest Price	10 th Percentile (bottom 10% of prices)
Top mount freezers	\$349	\$580
Side by Side freezers	\$999	\$1,064
Bottom mount freezers	\$678	\$1,399

Market share by model



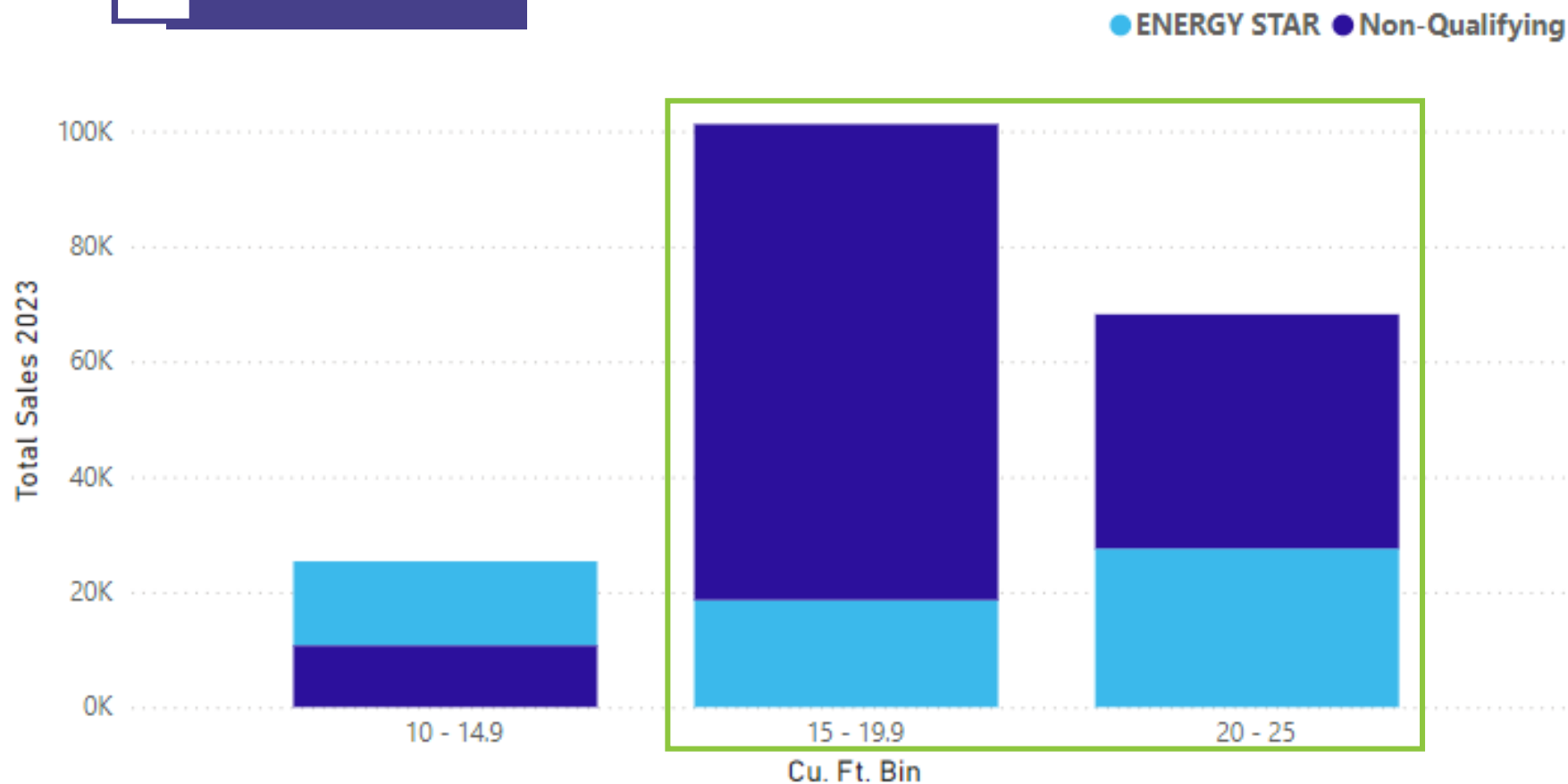
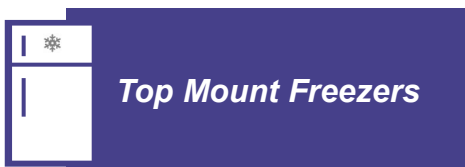


Top Mount Freezers – Promotional Price

		 Lowest Price	 # models under \$600	 # models \$601-\$850	 # models > \$851
 10 to 14.9 Cu. Ft	Energy Star	\$349	5	16	14
	NQ	\$379	7	7	8
 15 to 19.9 Cu. Ft	Energy Star	\$488	4	12	29
	NQ	\$598	3	26	9
 20 to 25 Cu. Ft	Energy Star	\$663	-	8	11
	NQ	\$579	1	13	7



Distribution of sales by Cu. Ft.



*Non-Qualifying 73% and
ENERGY STAR 27% of total sales*

*Key Features - play a major role
in consumer decision that is
marginally-offered in Energy Star
models.*

- Automatic Ice Maker
- Water Dispenser
- Auto defrost
- Smart or Connected



Bottom Mount Freezers – Promotional Price

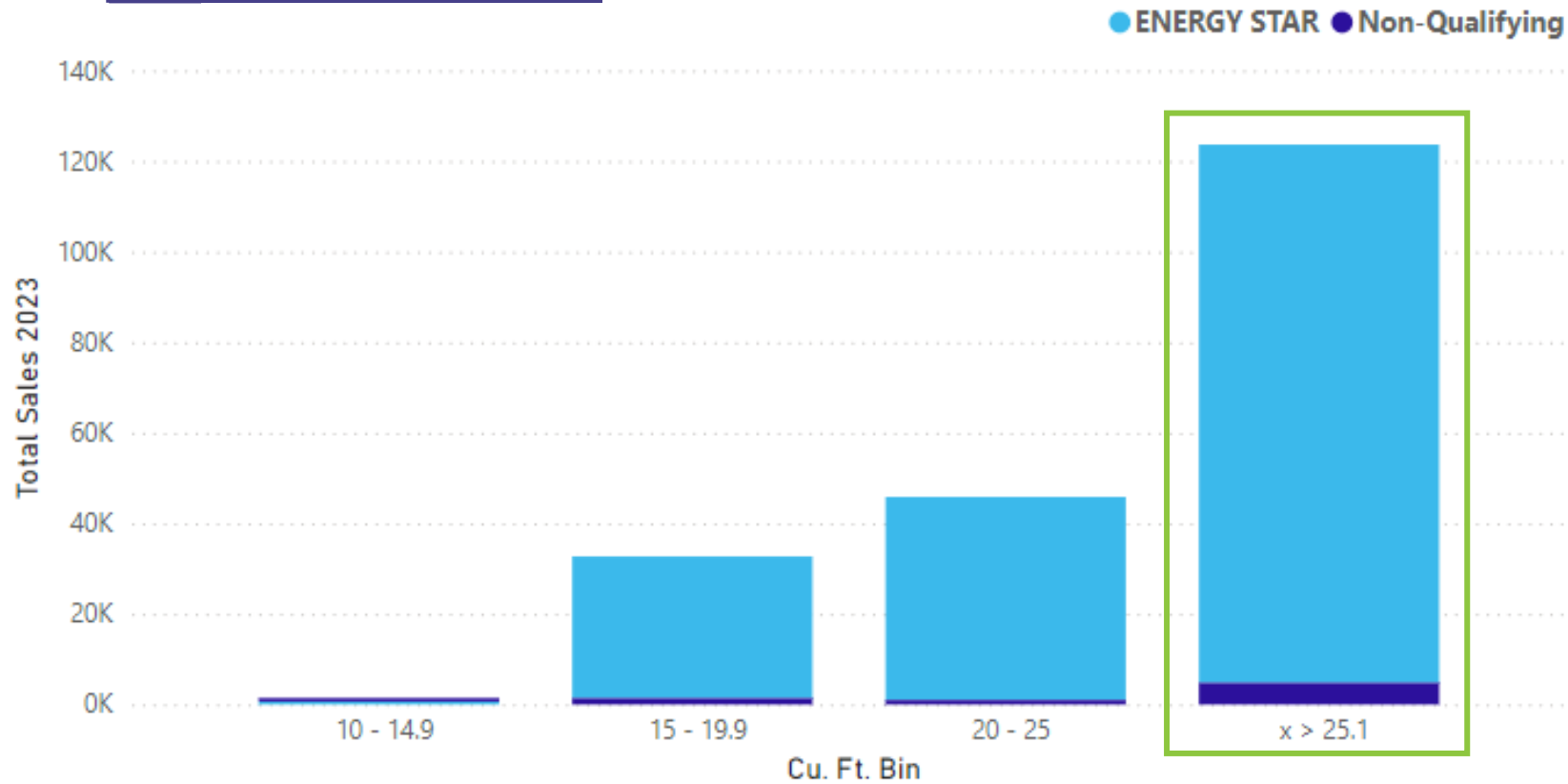
		 Lowest Price	 # models under \$600	 # models \$601 - 850	 # models > \$851
 10 to 14.9 Cu. Ft.	Energy Star	\$999	-	-	48
	NQ	\$998	-	-	3
 15 to 19.9 Cu. Ft.	Energy Star	\$678	-	4	49
	NQ	\$989	-	-	7
 20 to 25 Cu. Ft.	Energy Star	\$1,199	-	-	100
	NQ	\$2,099	-	-	7



Distribution of sales by Cu. Ft.



Bottom Mount Freezers



Non-Qualifying 4% and
ENERGY STAR 96% of total sales

$x > 25.1$ has the largest model
choice, over-indexing the market
share

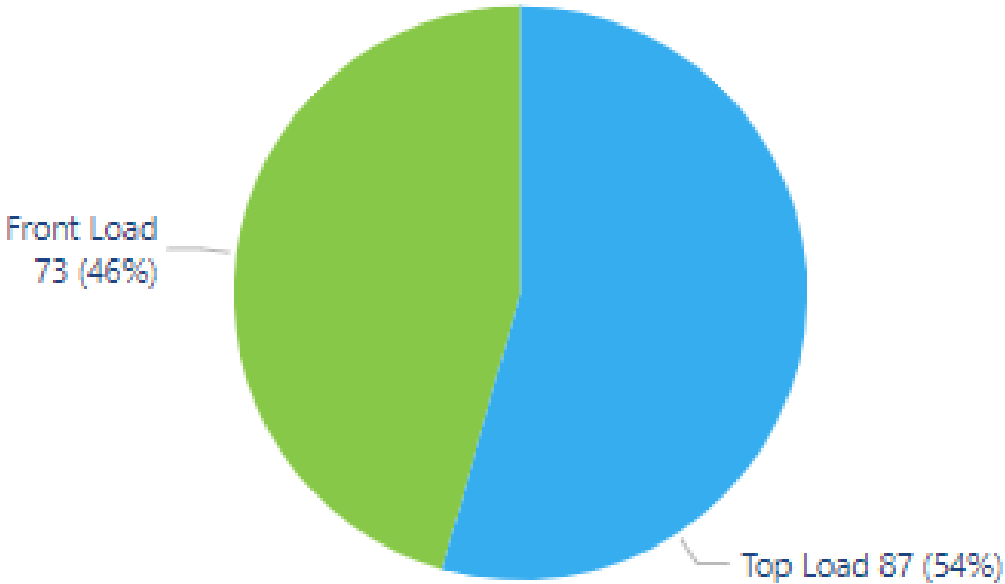
Refrigerators >10 Cu. Ft. Overall takeaways

- Cost conscious consumers are likely to buy Top mount refrigerators.
 - 10% lowest price top mount models are on average \$819 less than lowest priced bottom mount models.
- ENERGY STAR top mount refrigerators have models available in lower price point ranges, but don't sell as well as non-qualifying models possibly due to fewer features or in store stocking practices.
- Almost all bottom mount refrigerators are ENERGY STAR which are less efficient than top mount ENERGY STAR refrigerators.

Clothes Washers

Configuration	Lowest Price	10 th Percentile (bottom 10% of prices)
Top Load	\$448	\$649
Front Load	\$548	\$833

Market share by model





Top Load Clothes Washers – Promotional Price

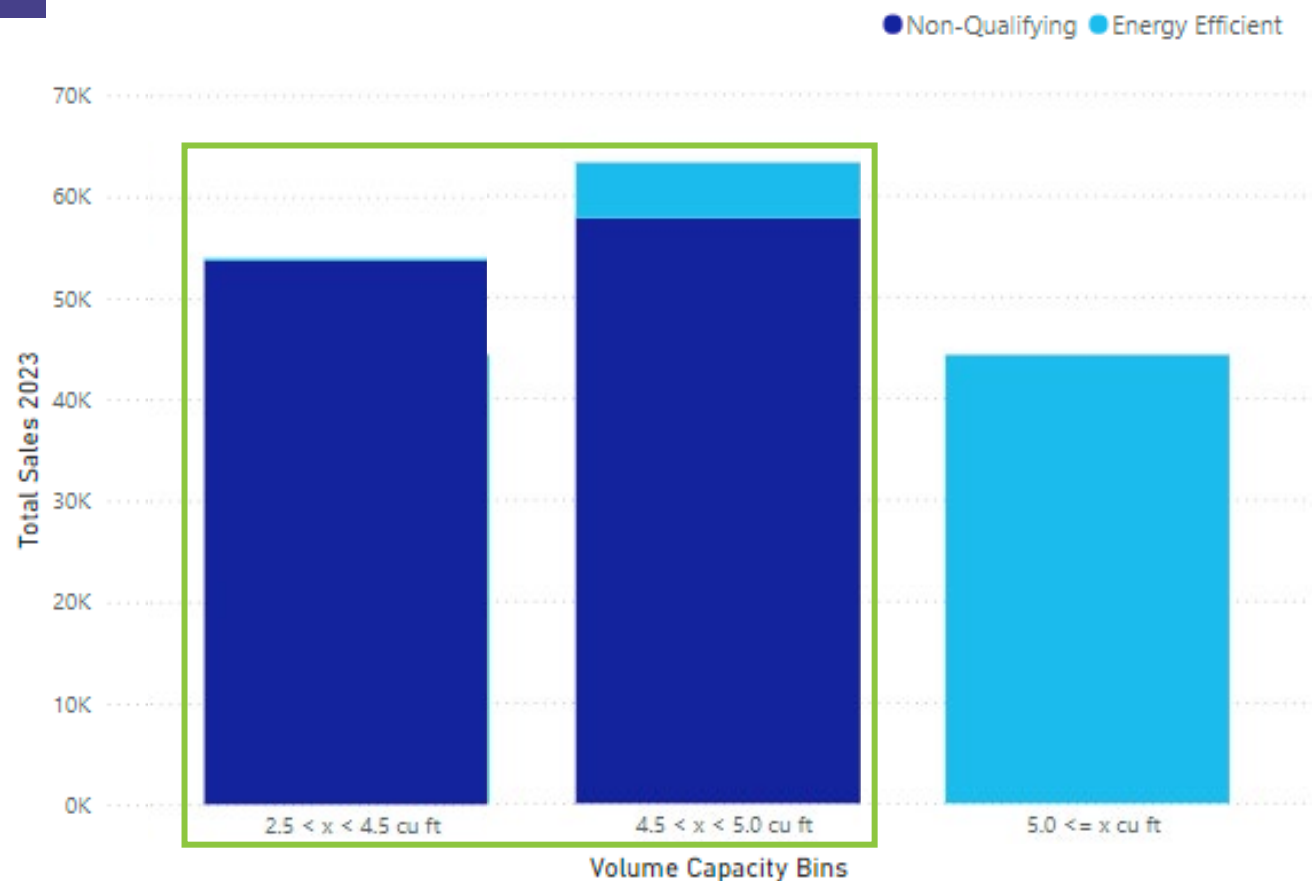
		 Lowest Price	 # models under \$600	 # models \$601-\$850	 # models > \$851
 2.5 to 4.4 Cu. Ft	Energy Star	\$1,649	-	-	2
	NQ	\$448	7	8	17
 4.5 to 5.0 Cu. Ft	Energy Star	\$498	1	4	-
	NQ	\$528	9	7	2
 5.1 < Cu. Ft	Energy Star	\$548	1	24	4
	NQ	-	-	-	-



Distribution of sales by Volume Capacity Bin



Top Load



- Top load washers have more low-priced NQ models than front load appealing to price conscious customers.



Front Load Clothes Washers – Promotional Price

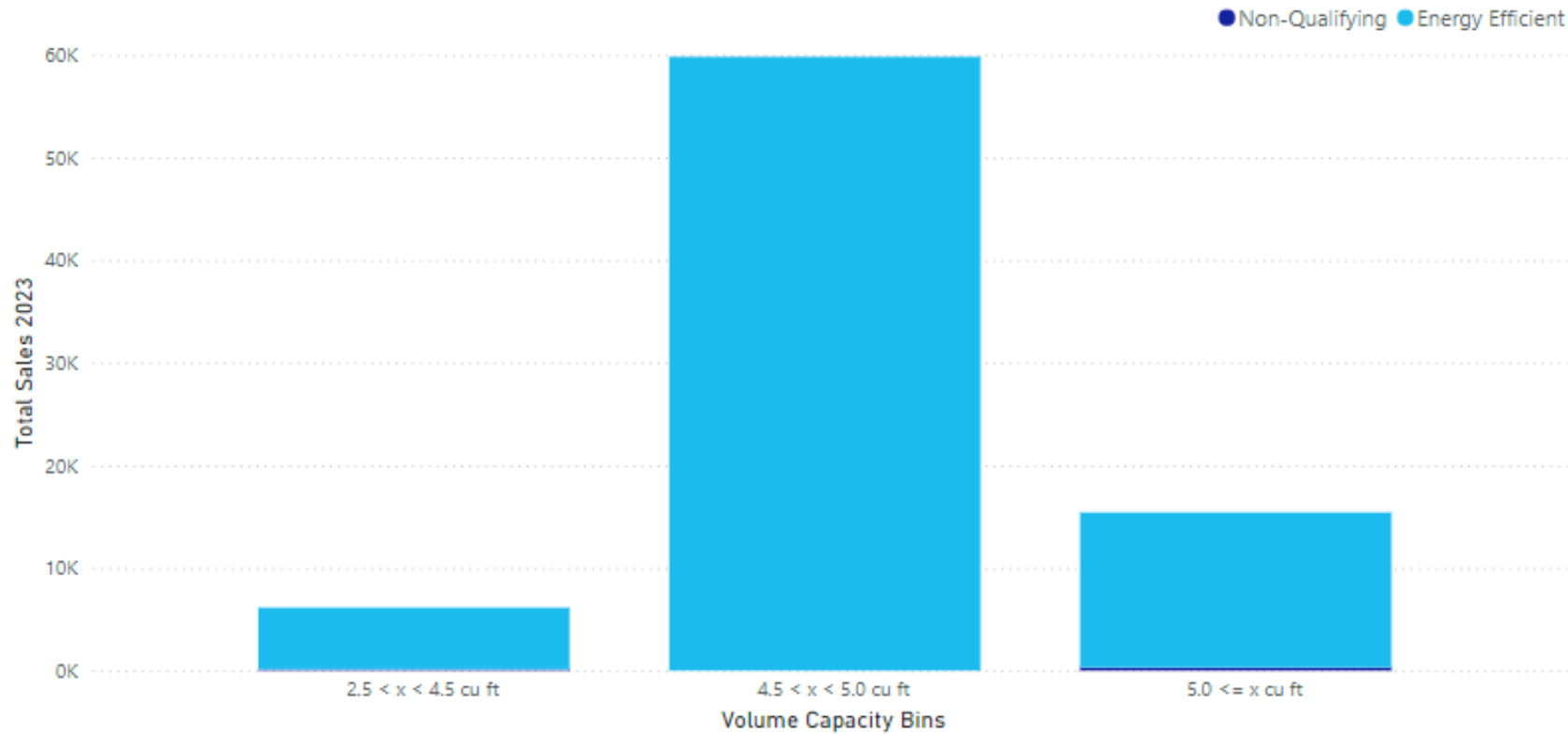
		 Lowest Price	 # models under \$600	 # models \$601-\$850	 # models > \$851
 2.5 to 4.4 Cu. Ft	Energy Star	\$648	-	2	1
	NQ	\$999	-	-	4
 4.5 to 5.0 Cu. Ft	Energy Star	\$548	1	13	25
	NQ	-	-	-	-
 5.1 < Cu. Ft	Energy Star	\$678	-	7	18
	NQ	\$1,299	-	-	2



Distribution of sales by Volume Capacity Bin



Front Load



■ Front load washers are all ENERGY STAR

Clothes Washer Takeaways

- Most of the Top Load ENERGY STAR washers are the larger size washers due to increased efficiency of higher revolutions per minute.
 - All Top Loading washers above 5 c.f. are ENERGY STAR.
- The lowest priced 10% of top load washer models are \$184 less than the lowest priced front load washers.
- 1 ENERGY STAR front load washer was priced very competitively at \$528.
- RPP will examine potential for low-priced front load washers.

Discussion Questions

- What stands out to you as a surprise or important tidbit?
- Are there opportunities for programs that this type of analysis might identify?
- Do you have recommendations for further analysis?



Thank You!



Anne Brink

Program Manager

Abrink@neea.org



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**Seattle
City Light**



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Housekeeping



Heads Up! Name Change in 2025

PCC → RCC

2024 **Products**
Coordinating
Committee



2025+ **Residential**
Coordinating
Committee





Tomorrow! ***PCC Annual Topic Planning***

- Time: 9:15 - ? (NLT Noon)
- Mural platform (visual guide only for discussion)
- Focus = topic development (review/discuss topic survey results)



Televisions
🛒Dryers
🛒Washers
🛒Dishwashers
🛒Explore More
Categories

Northwest Online Marketplace

- Testing/scanning project (now through 2025)
 - Goal: collect data, understand consumer purchasing behavior
- Engagements to-date
 - Products Coordinating Committee & 1-on-1s
- Regional site just went live (nw.enervee.com)
- Next steps
 - Start collecting search/purchasing behavior data
 - Updates via packets (for now)
 - Follow-ups with utilities as requested (to discuss/demo/explore participation)

2025 PCC/RCC Meeting Dates



Q1 (HYBRID)

- Tuesday, March 18
- Wednesday, March 19

Q2 (VIRTUAL)

- Thursday, June 26

Q3

NO Q3 MEETING

Q4 (VIRTUAL)

- Monday, December 1
- Tuesday, December 2

UPCOMING MEETINGS for 2024

DECEMBER

- December 5th – 2024 Leadership in Energy Efficiency Awards
- December 5th – Q4 NEEA Board Meeting Day 1
- December 6th – Q4 NEEA Board Meeting Day 2
- December 12th – Q4 Regional Emerging Technology Advisory Committee Meeting



10 YEARS LEADERSHIP IN ENERGY EFFICIENCY AWARDS

Join us for the hybrid ceremony!

NEEA's Board and staff will recognize individuals and teams for their exemplary dedication and performance in energy efficiency during the NEEA Board Annual Meeting on **December 5.**





***Any Other
Upcoming Events?
Announcements?***

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A piece of brown paper with a string tied in a bow. The string is a light brown, twisted cord. It is tied in a bow that is centered horizontally and slightly above the vertical center. The bow has two loops on the right side and two tails extending to the left. The background is a solid, textured brown paper.

Let's wrap it up!

Action Items| Any Final Qs?

- Action Items



Public Comment?
Action Items?
Closing Remarks?

Thank You!



See you tomorrow!

@9:15 am PST



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City Light





Products Coordinating Committee

Q4 2024 Meeting – Day 2

Wednesday, December 4, 2024

9:15 am, Pacific Time



Welcome!





AGENDA

(All Times Pacific)

9:15 – 9:25	Welcome
9:25 – 10:25	Advanced Heat Pumps
10:25 – 10:55	Consumer Products: Retail Products Portfolio
10:55 – 11:00	<i>Break</i>
11:00 – 12:00	Heat Pump Water Heaters

Next Steps

- Q1 2025 meeting in March
 - Hybrid at NEEA Offices
- Draft workplan shared with committee by January
 - Confirm topics
 - Confirm relevance of Q1 regional priority topic

Thank You!

See you in 2025!



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PACIFIC POWER.

