Residential Coordinating Committee

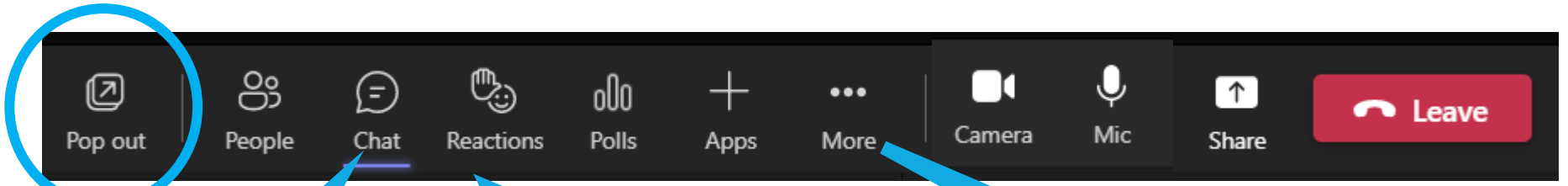
Q4 2025 Meeting – Day 1

Monday, December 1st

12:30 pm, Pacific Time

This meeting will be transcribed

Tools for Today: Engaging on Teams

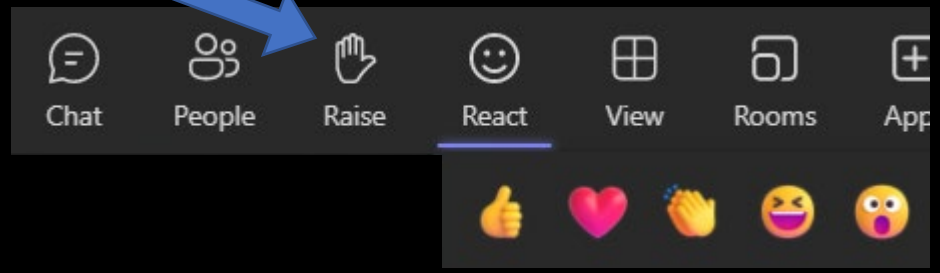


The chat is not captured in the recording.

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

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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)

12:30 -12:45	**Welcome, Agenda & Packet Review**
12:45 – 2:05	**Introductions & Regional Roundtable**
2:05 - 2:15	***BREAK***
2:15 – 3:15	**Regional Priority Topic** • **Retail Product Portfolio: Affordability Discussion**
3:15 – 3:25	***BREAK***
3:25 - 3:35	**Housekeeping**
3:40 – 3:50	**Recap, Next Steps, Adjourn**

Packet Review & Informational Updates

- **Tier 1: Agenda Items**
  - Memo: Regional Priority Topic: Retail Product Portfolio *(pg. 5)*
  - Memo: Annual Planning Session *(pg. 6)*

- **Tier 2: Informational Items**
  - Memo: Heat Pump Water Heater Workgroup Inform *(pg. 7)*
  - Memo: Northwest Online Marketplace (Enervee) Pilot Inform *(pg. 8)*

- **Activity Reports**
  - Heat Pump Water Heaters *(pgs. 12-14)*
  - Advanced Heat Pumps *(pgs. 15-18)*
  - Retail Product Portfolio *(pgs. 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

Please aim for 3-5 min max, thanks!

Introduction Prompt

(All)

- **Name**
- **Organization**
- ***And…***

Roundtable Focus

(NEEA PMs & RCC members)

- Highlights since Q2 of 2025
  - Programmatic updates
    - What's new? What are you hearing?
    - Any updates for the OR & WA Mercury/Fluorescent Ban
  - Organizational updates


Let’s take a BREAK!

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Regional Priority Topic *– Retail Product Portfolio: Affordability Discussion*

Anne Brink

Program Manager

RPP Affordability Laundry and Refrigerators

RPP Affordability

- Analyzed refrigerators, clothes washer and clothes dryers from webscraped data Oct, Nov 2024 and Jan 2025.
- Home Depot and Lowes websites

Limitations

- Online only information not in-store stocking
- Point in time information - We don’t know how often are they on sale.

Questions to answer

- Do opening price point consumers have access to affordable energy efficient washers, dryers and refrigerators?
- Are the energy/money savings meaningful to them?
- What is the price gap between ENERGY STAR and non-qualifying products in each category?
- What is the approximate savings potential for the region if we close this affordability gap and gain market share of efficient products?
- Are there product characteristics that differentiate opening price point models?
- What strategies might we use to better provide efficient products for opening price point customers?

Affordability Clothes Washers

Top Load ENERGY STAR Clothes Washers compared to Non-qualifying

	Top Load ENERGY STAR (ES)	Top Load Non-Qualifying (NQ)	Smallest Price Difference	Energy Savings ES vs. Top Load NQ	Annual $ Savings .15/kwh	Payback on cost increment	NEEA annual savings converting NQ to ES *
Promoted Price	$555	$457	$98	219 kwh	$32.85	3 years	.15 aMW assuming 30% of opening price point models move to ES
Regular Price	$799	$468	$331	219	$32.85	10 years	

* Savings is vs current minimum standards machines not older used products.

Front Load Most Efficient Clothes Washers Compared to Top Load Non-Qualifying

	Front Load ENERGY STAR	Top Load Non-Qualifying	Smallest Price Difference	Energy Savings vs. Top Load NQ	Annual $ Savings .15/kwh	Payback on cost increment	Regional annual savings converting NQ to ES
Lowest Promoted Price	$556	$457	$99	380	$57	1.7	.17 aMW assuming 20% of opening price point models move to ES front load
Lowest Regular Price	$848	$468	$380	380	$57	6.7	

Lowest priced models.

Primary Washer Characteristics

Size – ENERGY STAR Washers are a larger size

- Top load non-qualifying sizes are 3.8 to 4.0 cf
- Top load ENERGY STAR sizes are 4.6 to 5.1 cf
- Front load ESME are 4.5 cf

ENERGY STAR are impellars & non-qualifying are agitators.

Is this a barrier to the opening price point buyer?

Pricing of Specific Washer Models 2024

	Reg Price	Sales Price
Non-qualifying		
• Top Load NQ Hot Point 4 cf	$599	$457
• Top Load NQ GE 4 cf	$649	$491
ENERGY STAR		
• Top Load ENERGY STAR GE 4.6 cf	$799	$555
• Top Load ENERGY STAR GE 4.9 cf	$899	$641
ENERGY STAR Most Efficient		
• Front Load ESME Samsung 4.5 cf	$899	$639
• Front Load ESME LG 4.5 cf	$899	$681

Conclusions

- There is a substantial price barrier in this category especially at regular pricing $98-$380
- ENERGY STAR machines are larger which may contribute to the price barrier.
- A few **front load** Most Efficient clothes washers are not much more expensive than the ENERGY STAR top load washers. and save more money and energy and have a better payback. (Water savings not calculated.)
- ENERGY STAR toploaders are impellar machines which may be a barrier to opening price point customers.

Affordable Clothes Dryers

ENERGY STAR Dryers

	ENERGY STAR (ES)	Non-Qualifying (NQ)	Smallest Price Difference	Energy Savings vs. Top Load NQ	Annual $ Savings .15/kwh	Payback on cost increment	NEEA annual savings converting NQ to ES
Lowest Promoted Price	$554	$498	$56	93.8 kwh/year	$14.07	4 years	.079 aMW if 30% of the opening price point models move to ENERGY STAR
Lowest Regular Price	$799	$699	$100	93.8 kwh/year	$14.07	7 years	

Primary Dryer Characteristics

ENERGY STAR Dryers are larger in size.

- All ENERGY STAR dryers that are not compact are over 7 cf in size (75 models)
- Non-qualifying excluding compact range from 4.5 cf to over 7 cf in size

Pricing of specific dryer models 2024/2025

	Reg Price	Sales Price
Non-qualifying		
• Amana 6.5 cf vented	$629	$498
• Whirlpool 7 cf vented	$648	$498
• GE 6.2 cf vented	$699	$498
ENERGY STAR		
• LG 7.3 cf vented	$799	$554
• GE Profile 7.4 cf vented	$842	$684
• LG 7.3 cf vented	$899	$698

Dryer conclusions

- Price differential is lower than washers between ENERGY STAR and non-qualifying machines. The lowest differential is $56-$100
- Annual energy savings is lower than washers. 93.8 kwh
- Payback - good range - 4-7 years
- Dryer category is less impactful for savings energy for consumers and utilities.

Affordable Refrigerators

ENERGY STAR Refrigerators

	ENERGY STAR (ES)	Non-Qualifying (NQ)	Smallest Price Difference	Energy Savings vs. Top Load NQ	Annual $ Savings .15/kwh	Payback on cost increment	NEEA annual savings converting NQ to ES
Lowest Promoted Price	$454	$471	($7)	42	$6.3	immediate	.015 aMW per year converting 30% of opening price point NQ models to ESME
Lowest Regular Price	$636	$490	$146	42	$6.3	23 years	

Pricing of specific refrigerator models 2024/2025

	Reg Price	Sales Price
Non-qualifying		
• Frigidaire 22.1 cf	$679	$568
• GE 19.7 cf	$571	$571
• Frigidaire 16.9 cf	$679	$572
ENERGY STAR Most Efficient		
• Midea 17.1 cf	$649	$454
• Midea 17.1 cf	$729	$475
• Midea 22.1 cf	$799	$508

Primary Refrigerator Characteristics

Sizes

- Non-qualified average size is 20 cf and ESME average 21 cf.

Other characteristics

- 12% of non-qualified units do have ice makers no ESME models have ice makers

Refrigerator Conclusions

- ESME Refrigerators have a low price differential when on sale but fairly high at regular pricing. -$7 to $146
- Savings from a non-qualifying top mount refrigerator to an ESME refrigerator is low $6.30 per year.
- Similar primary characteristics between low price models of ESME and non-qualifying.
- Shift indicates affordability for refrigerators is a floor stocking issue not model availability.

Product Comparison

	Access to affordable efficient products	Price Gap	Meaningful annual savings? ($.15 per kwh)/payback	Estimated annual regional savings
Clothes Washers Topload to topload	Low	$153-$265	$32.85/ 3-10 years	.15 aMW
Clothes Washer Topload to Front load	Low	$152 - $283	$58.95 1.7-6.7	.17 aMW
Clothes Dryers	Moderate	$56-$100	$14.07 4-7 years	.079 aMW
Refrigerators	High when on sale Low when not on sale	($7) - $146	$6.30 Immediate – 23 years	.015 aMW

Affordability Strategies

- Make up the price differential to the consumers for the more efficient models through incentives
- Influence stocking of more affordable efficient models at retailers
- Influence manufacturers to make more efficient affordable models
- Finance more efficient affordable models
- Bulk buying for price discounts
- Cover the full cost of the product up to a certain dollar amount

Discussion Questions

- Any experience of any of these affordability strategies that you want to share?
- Other ways to approach affordable energy saving opportunities in the consumer appliance category?

One Potential - Income qualified financing

- Provide regional income qualified financing for affordable efficient consumer products through ENERVEE – communicate availability through utilities
- Combine with influencing stocking practices of selected products with ESRPP retailers
- This could move business from rent to own and used appliances to ESRPP retailers.
- Addresses first cost challenge.

Thank you!

Anne Brink

abrink@neea.org

NEEA Program Manager

Let’s take a BREAK

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HOUSEKEEPING

Housekeeping

- 2025 HPWH Marketing Campaign update
- Looking Ahead
  - Upcoming Meetings & Events
- Annual Planning

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2025 HPWH marketing campaign

- Level Up advertising launched the first week in October!
  - Facebook, Instagram, NextDoor
  - Display ads
  - Streaming audio
- More than 181,000 page views to date
  - 123,000+ to the English landing page
  - 58,000+ to the Spanish landing page
- Final insights will be presented at the Q1 2026 RPAC/RPAC+ meeting
- Any questions? Reach out to Britt Cutsforth Dawkins (bdawkins@neea.org)

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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 8.**

For more information go to:
neea.org/leadershipawards

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Efficiency Exchange 2026

Save the Date for EFX26

May 5-6

Boise, Idaho

neea.org/EFX

2026 RCC Meeting Dates

Q1

HYBRID @ NEEA

- Tuesday, March 17
- Wednesday, March 18

Q2

- Tuesday, June 16

Q4

- Tuesday, December 1
- Wednesday, December 2

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Upcoming NEEA Meetings

December

- 1st & 2nd — Q4 Residential Coordinating Committee
- 4th — Q4 Regional Emerging Technology Advisory Committee
- 8th — 2025 Leadership in Energy Efficiency Awards
- 8th & 9th — Q4 Board Meeting
- 10th — Q4 Natural Gas Advisory Committee Interim Webinar

Other regional / industry events or announcements?

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RCC Annual Topic Planning

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

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Residential Coordinating Committee (RCC) 2025 Annual Workplan

Q1 Meeting Day 1 – 18th March, Tuesday (HYBRID)	Q1 Meeting Day 2 – 19th March, Wednesday (HYBRID)	Q2 Meeting – 26th June, Tuesday (VIRTUAL)	Q4 Meeting Day 1 – 1st December, Monday (VIRTUAL)	Q4 Meeting Day 2 – 2nd December, Tuesday (VIRTUAL)
Advanced Heat Pump Tentative Topic: Cold climate / peak management and addressing backup heating management Or Tentative Topic: Comprehensive Report on Low Load Efficiency (TBD once Topic is confirmed with NEEA PM in January) Desired Outcome: TBD during topic buildout	Heat Pump Water Heater Topic: Hot Water Innovation Prize update (30 minutes) Desired Outcome: TBD during topic buildout Topic: Round Table Discussion - Utility Program Strategies, what is your 2025 plan and goals (60 minutes) Desired Outcome: TBD during topic buildout	Heat Pump Water Heater Topic: Coordination opportunity: Product review – what new products have come to market, what is unique about the products (90 minutes) Desired Outcome: TBD during topic buildout	Consumer Products Retail Products Portfolio Topic: NEEA Shareout: RPP Program Updates (60 minutes) Desired Outcome: TBD during topic buildout	2026 ANNUAL TOPIC PLANNING


Let’s wrap it up!

Action Items| Any Final Qs?

- Action Items
- Public Comment?
- Closing Remarks?

Thank You!

See you tomorrow!

@9:15 am

Residential Coordinating Committee Meeting

Q4 2025 Meeting - Day2

Annual Planning Session

Tuesday, December 2nd

This meeting will be recorded for the notes and discussion

WELCOME & GOOD MORNING

What's your go to breakfast item?

AGENDA

(All times Pacific)

9:15 – 9:25 am	**Welcome & Agenda**	Anouksha Gardner
9:25 – 10:25 am	**Advanced Heat Pumps**	Suzi Asmus
10:25 – 10:55 am	**Retail Product Portfolio**	Anne Brink
10:55 – 11:00 am	**BREAK**	
11:00 – 11:50 am	**Heat Pump Water Heaters**	Emily Rosenbloom
11:50 – 12:00	**Recap, Next Steps, Adjourn**	Anouksha Gardner

NEXT STEPS

- Q1 2026 meeting
  - 17th & 18th March
  - Hybrid at NEEA office
- Draft workplan shared with committee by January 2026
  - Confirm topics
  - Confirm relevance of Q1 regional priority topic based on workplan plotting

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ANNUAL PLANNING

AGENDA

(All times Pacific)

9:15 – 9:25 am	**Welcome & Agenda**	Anouksha Gardner
9:25 – 10:25 am	**Advanced Heat Pumps**	Suzi Asmus
10:25 – 10:55 am	**Retail Product Portfolio**	Anne Brink
10:55 – 11:00 am	**BREAK**	
11:00 – 11:50 am	**Heat Pump Water Heaters**	Emily Rosenbloom
11:50 – 12:00	**Recap, Next Steps, Adjourn**	Anouksha Gardner

Thank You!