



2025 ANNUAL REPORT

Letter to the Region

2025 marked a year of meaningful firsts for the Northwest. As the alliance launched the first year of its 2025 – 2029 business cycle, NEEA began translating regional priorities into action, advancing solutions designed to meet the evolving needs of electric and natural gas customers across our four-state region.

Energy efficiency remains a cost-effective and strategic energy resource that is a vital part of addressing the future needs of the Northwest energy system. NEEA’s collaborative model brings utilities and energy efficiency organizations together to share risk, align markets, and drive long-term change that results in sustained energy savings. This regional coordination helps the Northwest address resource adequacy, support affordability, and navigate emerging technologies that are quickly shaping how we live and work. In 2025, these aligned regional efforts delivered results, including the advancement of NEEA’s first dedicated dual-fuel program, Residential Dual-Fuel HVAC.

Building on years of electric and natural gas Market Transformation, this work marks a new chapter in how the region approaches integrated energy solutions. These systems provide a flexible pathway to optimize energy use between the electric and gas systems based on grid conditions, fuel prices, and extreme weather events and reflect a shared regional commitment to delivering reliable, affordable and flexible energy for all Northwest households and businesses.

Meeting the region’s growing energy needs will require as much cost-effective energy efficiency as we can deliver. Building on a strong foundation within its electric portfolio, NEEA is accelerating near-term energy savings by adding new products to existing programs, expanding into new markets and rural communities, and leveraging new channels like the Northwest Marketplace to open new pathways to consumers.

At the same time, early progress in the Whole Building Special Project is helping the region advance more integrated approaches to building performance, while the region’s first End-Use Load Flexibility Market Transformation effort is helping manage demand through better, more responsive energy use.

The alliance continues to advance new opportunities, including dual-fuel system applications in commercial and residential markets, advanced commercial water heating, and emerging technologies like high-efficiency fan systems, bringing forward new market pathways to support the region’s evolving energy needs.

Taken together, these efforts are more than milestones, they are proof of what’s possible when the region moves forward with shared purpose. As we look ahead, the path is clear: by continuing to invest in collaboration, embrace innovation, and scale proven solutions, we can ensure energy efficiency remains the backbone of a resilient, affordable, and dependable energy system.

As you read this year’s report, you’ll see how these firsts are already shaping what comes next. As the challenges before us evolve, so does our collective ability to meet them. NEEA is proud to help shape a future where efficiency doesn’t just support our energy needs, it helps define how we meet them.



With increasing demand on our energy grid, we must meet the challenge head-on to ensure affordable, reliable power for Montanans. I appreciate the work of the Northwest Energy Efficiency Alliance to advance practical, energy-efficient technologies and solutions that help meet the growing energy needs of our state.

Greg Gianforte, Governor of Montana



Becca Yates
Executive Director
NEEA



Gilbert Archuleta
Director, Customer Energy Management
Puget Sound Energy

2025 MARKET TRANSFORMATION HIGHLIGHTS

In 2025, NEEA's proven approach to Market Transformation has delivered unprecedented value to the region. The stories below showcase some of the many ways the alliance advances energy efficiency to reduce energy waste, support grid resiliency and provide economic value to the region.

Read the full articles here: neea.org/annualreport.



Priming the Region for a Turning Point in Pump Efficiency

Following the U.S. Department of Energy's (U.S. DOE) 2020 release of a new energy efficiency standard for commercial and industrial pumps, the alliance leveraged its data expertise, mid and upstream market relationships, and regionwide scale to support the Northwest's compliance with the new regulations.

In 2025, these efforts achieved several milestones, including the launch of an improved, user-friendly pumps energy rating label, the market advancement of a promising new pumps technology, and the expansion of the alliance's partnerships with manufacturers and manufacturer representatives to include organizations operating largely in Idaho, Montana, and rural Oregon and Washington. With NEEA's Market Transformation process in action and pump efficiency more achievable for the region than ever, the alliance is poised to continue expanding its market support for this product into the agricultural sectors of all four Northwest states.



Natural Gas Efficiency in Commercial Buildings: Advancing Practical Solutions at Scale

Commercial buildings are entering a new phase of energy efficiency defined by a shift toward resilient, scalable solutions. Rather than seeking new systems, cost-conscious decision makers today are focused on technologies that are easier to adopt, easier to install, and easier to integrate into existing buildings. This shift reflects both market reality and growing system needs. As demand on the electric grid increases, particularly during peak periods, efficient natural gas technologies can play an important role in supporting reliability, managing costs, and expanding energy choices for building owners.

Through its work with utilities, manufacturers, and market actors, NEEA is advancing a whole systems approach to natural gas efficiency that prioritizes real-world implementation. The results are twofold: a portfolio of solutions that can be deployed across a diverse and often constrained commercial building stock and a suite of emerging technologies to build on for the future.



Ear to the Ground: How Market Research and Evaluation Accelerate Progress

Advancing energy efficiency across the Northwest means more than innovative technologies and strong partnerships, it requires trusted market insights and evaluation to determine if NEEA's efforts are driving real progress. That's where NEEA's team of Market Research and Evaluation (MRE) scientists play a critical role.

From developing a deep understanding of a new target market to measuring long-term impact, NEEA's MRE scientists support every stage of NEEA's Market Transformation work. Through rigorous research, structured evaluation and data-driven insights, the team helps ensure that programs are grounded in evidence, responsive to changing market conditions and delivering measurable value to the entire region.



How Data Drives Market Transformation

For the Northwest Energy Efficiency Alliance (NEEA), data has always been at the center of Market Transformation. And as the alliance moves deeper into Cycle 7, the role of data is evolving — becoming even more strategic, more integrated across markets, and more instrumental in delivering long-term value to funders.

In Cycle 6, NEEA expanded its data collection capacity, establishing systems and partnerships that give the alliance and its funders an unprecedented view of the market. Now, that foundation is allowing NEEA to ask sharper questions, identify barriers earlier, and pinpoint the most effective points of intervention.

"NEEA's data plays an important supporting role in validating that efficiency strategies are delivering tangible results. Regional market data helps give Energy Trust the confidence to plan our programs, ensuring they are grounded in real-world adoption and positioned to deliver lasting energy savings."

Jackie Goss, PE | Lead Engineer - Planning & Evaluation | Energy Trust of Oregon



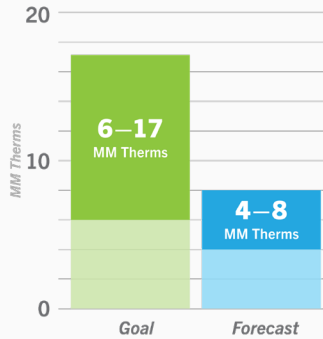
View NEEA's 30-year history of success: neea.org/history-of-success

2025 BY THE NUMBERS

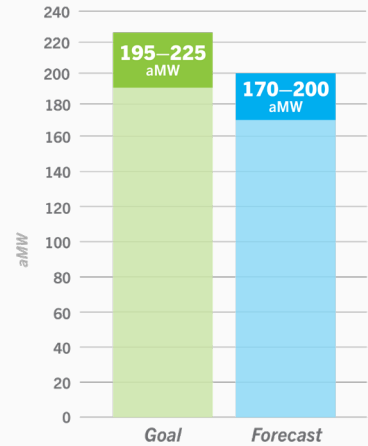
Co-Created Natural Gas Savings



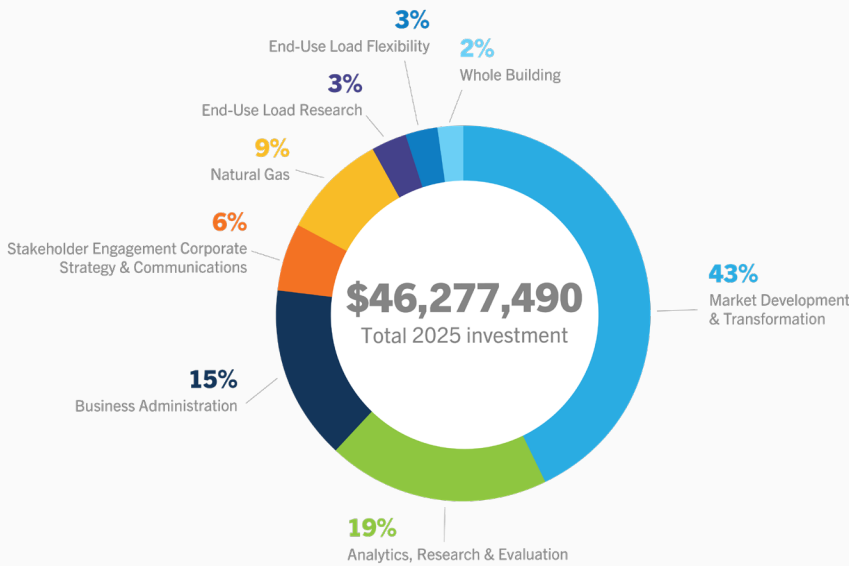
Co-Created Natural Gas Energy Savings (Progress to 5-year Goals)



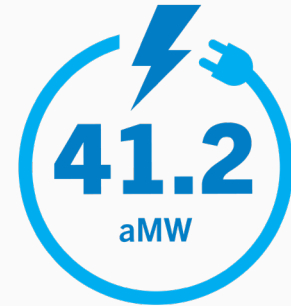
Co-Created Electric Energy Savings (Progress to 5-year Goals)



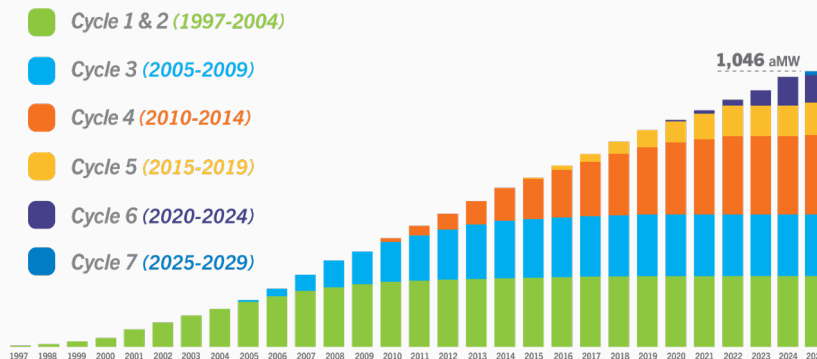
2025 Investments



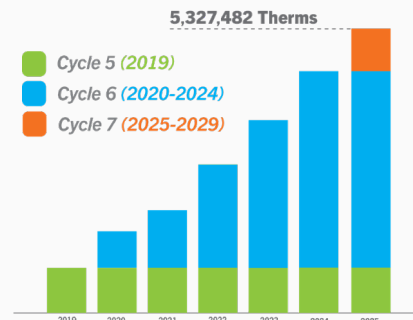
Co-created Electric Energy Savings



Additive Co-Created Savings Electric



Natural Gas



NEEA Board of Directors

The list below reflects Board members that served on the Board in 2025, as well as those currently serving on the Board at time of publishing.

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Energy Trust of Oregon

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Clark Public Utilities

Kellye Dundon
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(left Board in 2026)
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Jamae Hilliard Creecy
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Bonneville Power
Administration

Nicole Hydzik
NEEA Board Secretary
Avista Utilities

Dan James
(joined Board in 2026)
Bonneville Power
Administration

Chris Johnson
Benton PUD

Whitney Jurenic
(joined Board in 2026)
NorthWestern Energy

Josh Mitchell
Chelan PUD

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(left Board in 2026)
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Quentin Nesbitt
Idaho Power

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Caleb Reimer
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Kyle Roadman
NEEA Board Treasurer
Emerald PUD

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Montana Governor's
Office

Ruchi Sadhir
Oregon Governor's Office

Richard Stover
(left Board in 2025)
Idaho Office of Energy
and Mineral Resources

Jim White
(left Board in 2025)
Chelan PUD

Danie Williams
(left Board in 2025)
NorthWestern Energy



Read NEEA's 2025 Annual Report to learn more about how the alliance is a uniting force in driving energy efficiency innovation throughout the Northwest: neea.org/annualreport