



CEE's Annual Energy Efficiency Industry Report 2009: The Growth of the Ratepayer Funded Energy Efficiency Industry

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History of Efficiency Industry Survey

- ▶ 2006-2008: Annual data collection project by CEE
- ▶ 2009: CEE-IEE-AGA joint efficiency program data collection project
 - Our members asked us to work together on collection of Efficiency Program information
 - Partnership with IEE and AGA expanded coverage, depth, streamlined participation
 - All IEE members, AGA members, CEE members, and non-members identified as program administrators included
 - Single survey instrument
 - APPA and CGA also distributed survey to their members

CEE-IEE-AGA Joint Efficiency Program Data Collection Project

- ▶ Shared data collection is more comprehensive & efficient
 - Easier to identify program administrators
 - Utility and non-utility administrators
 - Obtained budgets/expenditures for:
 - 71 current gas portfolios
 - 141 current electric portfolios
 - Greater participation among non-members
- ▶ Shared instrument & data leads to more consistent and better picture of our industry

Collaboration permitted an Expanded Scope

- ▶ 2009 Budget as well as 2008 Expenditures
 - By major sector categories
- ▶ 2008 reported program impacts
 - By major sector categories
- ▶ Qualifying equipment for major programs
- ▶ Company level reporting on non-impact data

Why Collect? Benefits

- ▶ Establishes ratepayer funded efficiency programs as an industry
- ▶ Paints more comprehensive picture of industry scale and scope
- ▶ Creates consistency in budget and impact data
- ▶ Improves data transparency & access
- ▶ Most timely information about our industry

Keys to Success

- ▶ Opportunity to influence manufacturers, other industries to prioritize efficiency
- ▶ Program interest in portraying our industry
- ▶ Respect for confidentiality, impact data
- ▶ High response rates

Response Rates

▼ Gas

- Current gas program administrators (including CEE members): 81%
- Lower if non-administrators included

▼ Electric

- All: 70%
- CEE members only: 89%
- Non-CEE members: 53%

▼ Joint collection boosts non-member response rate and expands survey reach

▼ **CEE members: *be sure to respond in 2010***

In 2009, CEE-AGA-IEE
data show:

\$6.1 Billion

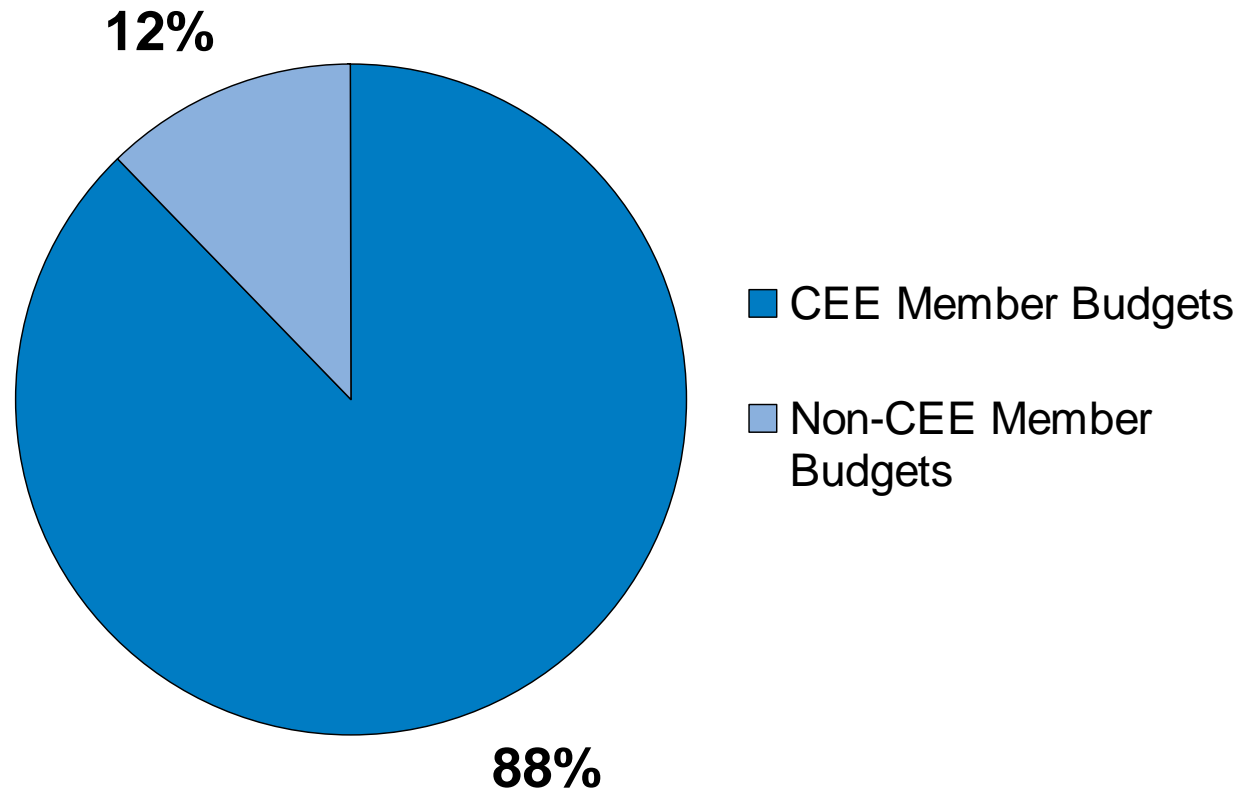
**Energy Efficiency
Program Industry**



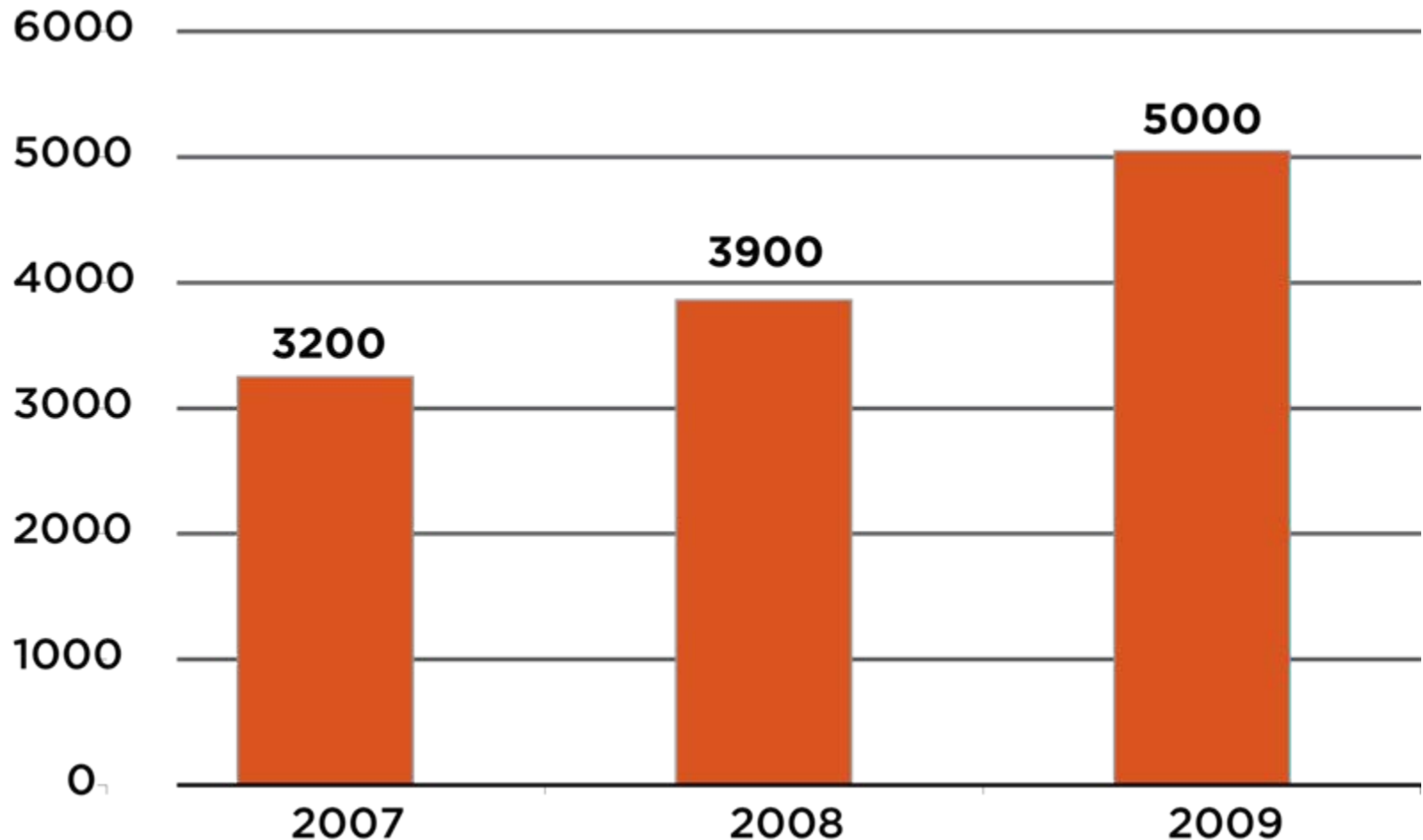
Energy Efficiency Program Budget Headlines

- ▶ US budgets have doubled since 2006
 - Respondents from 46 states (up from 37 in 2008)
- ▶ Canadian budget growth since 2007: 31%

CEE Members Responsible for 88% of Total DSM Budgets

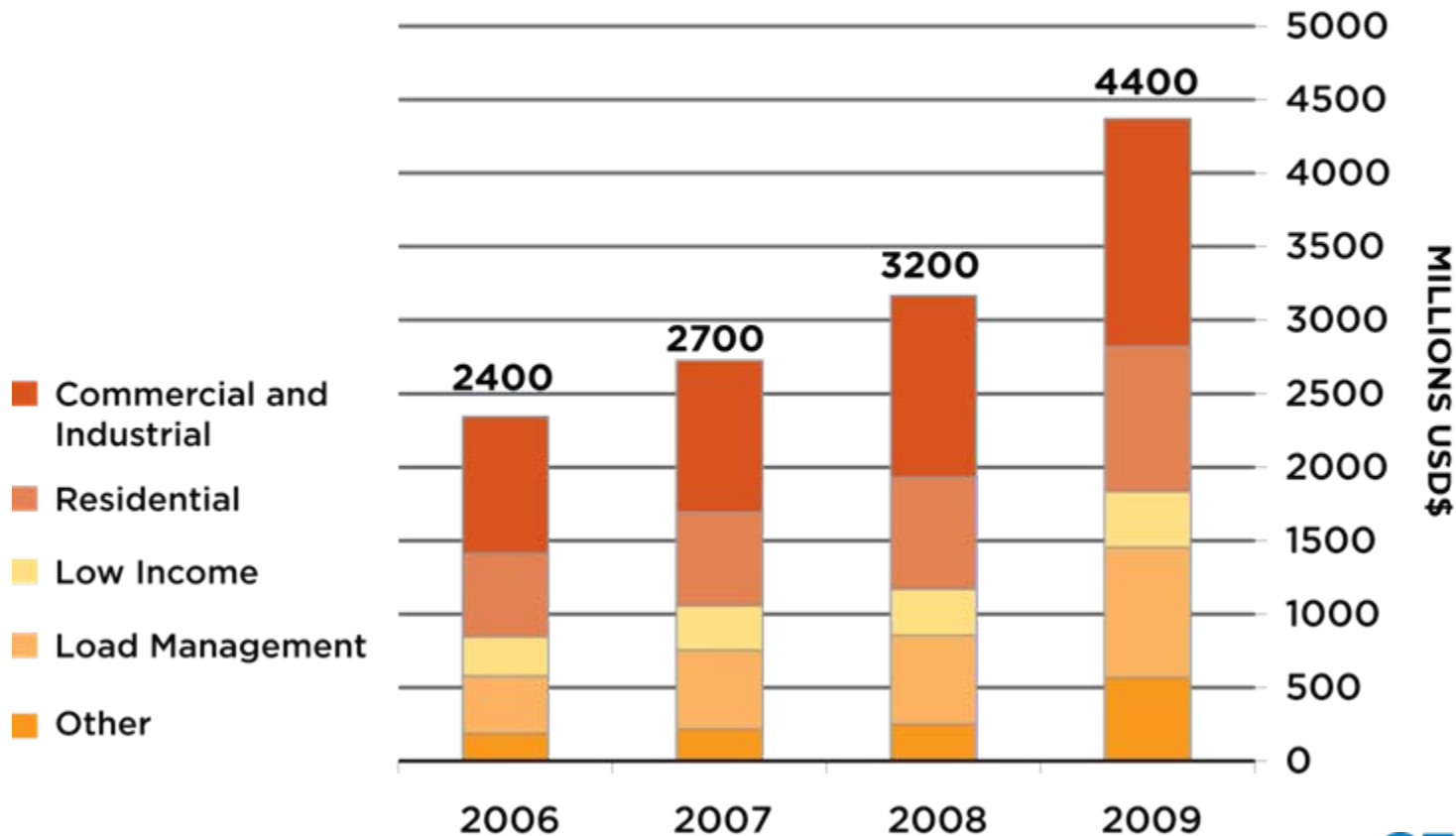


Binational Electric DSM Budgets Hit More Than \$5 Billion in 2009



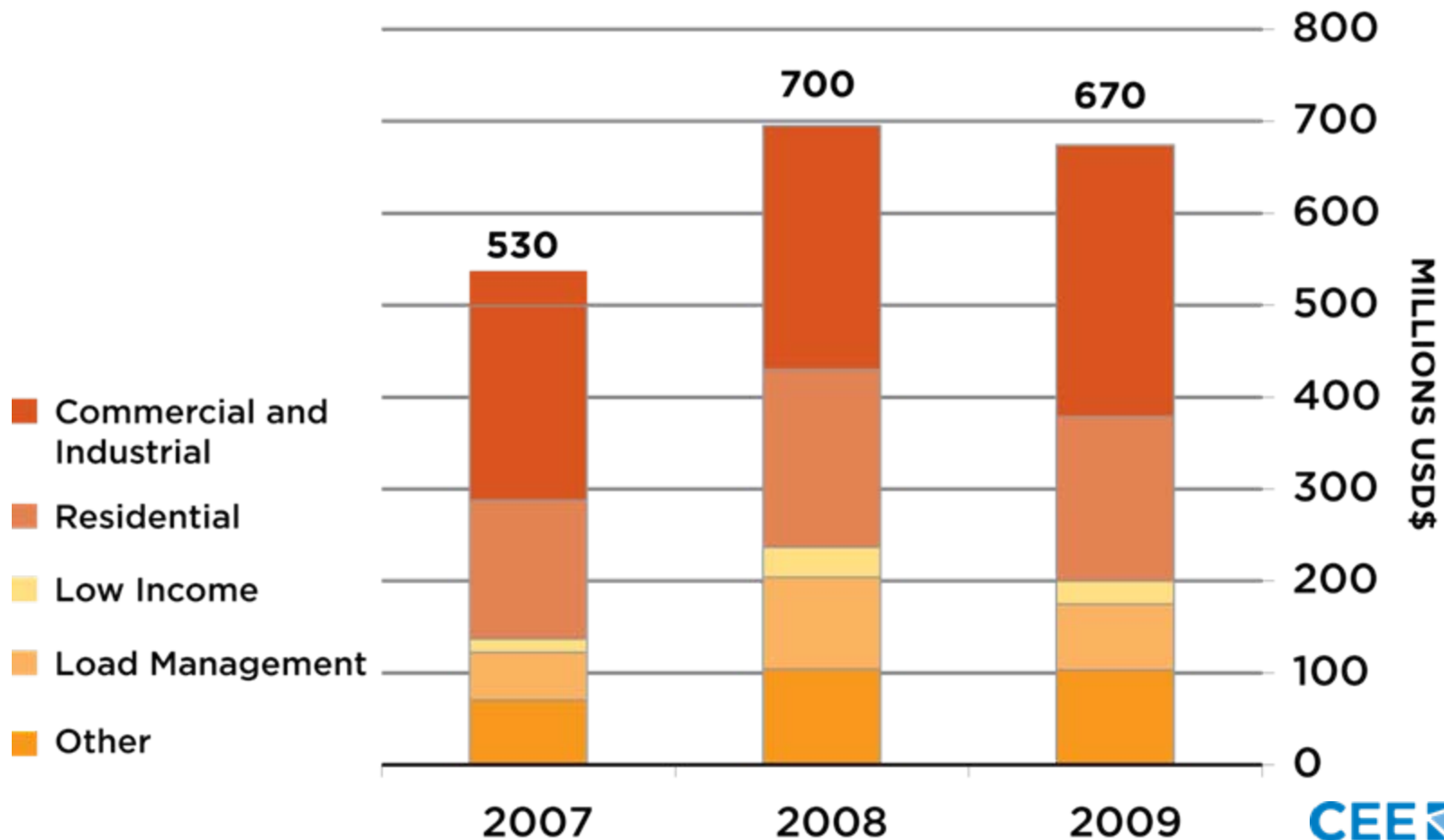
U.S. Electric Budgets Nearly Double

United States Electric Budgets

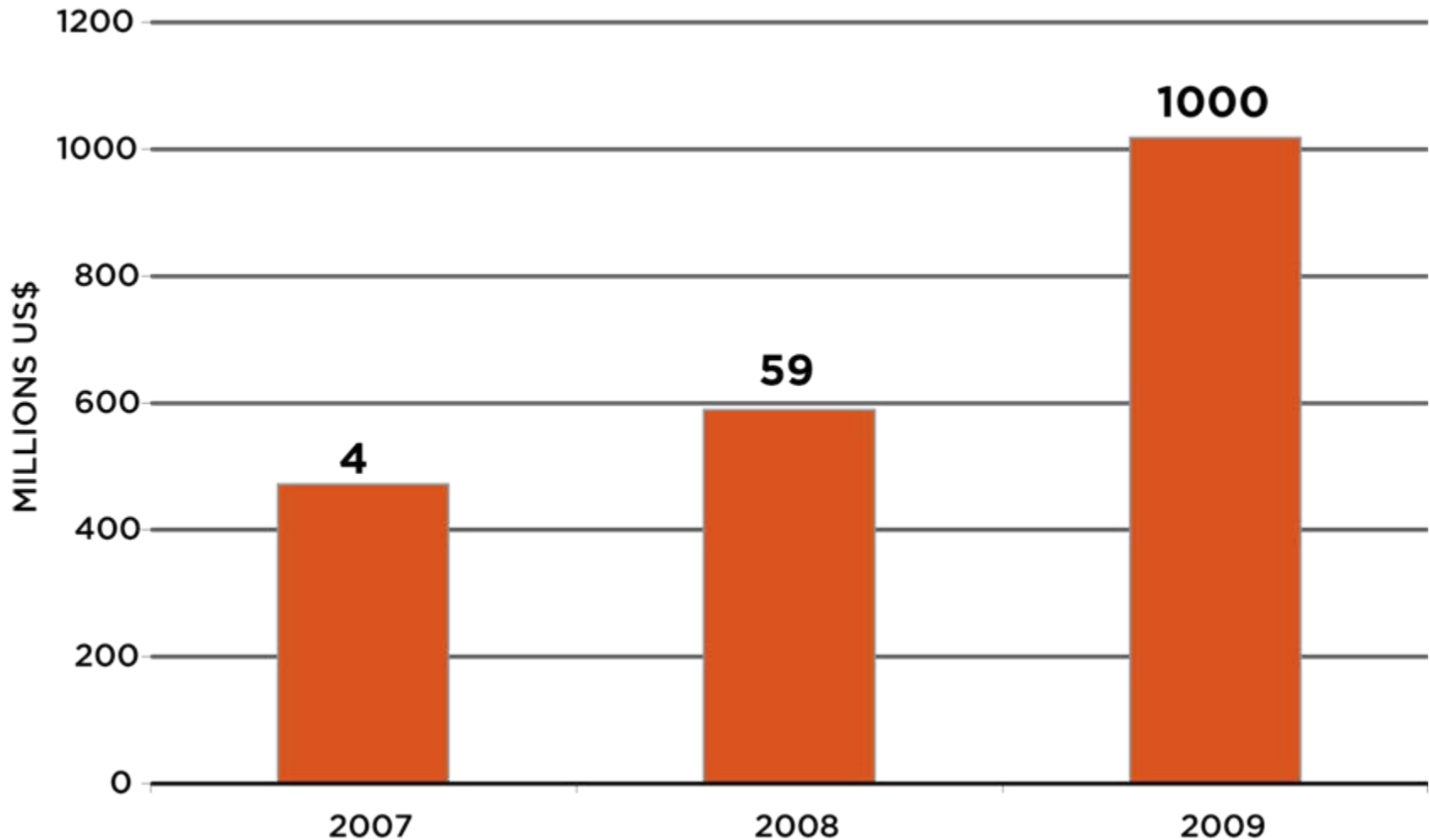


Canadian Electric Budgets Stable

Canadian Electric Budgets

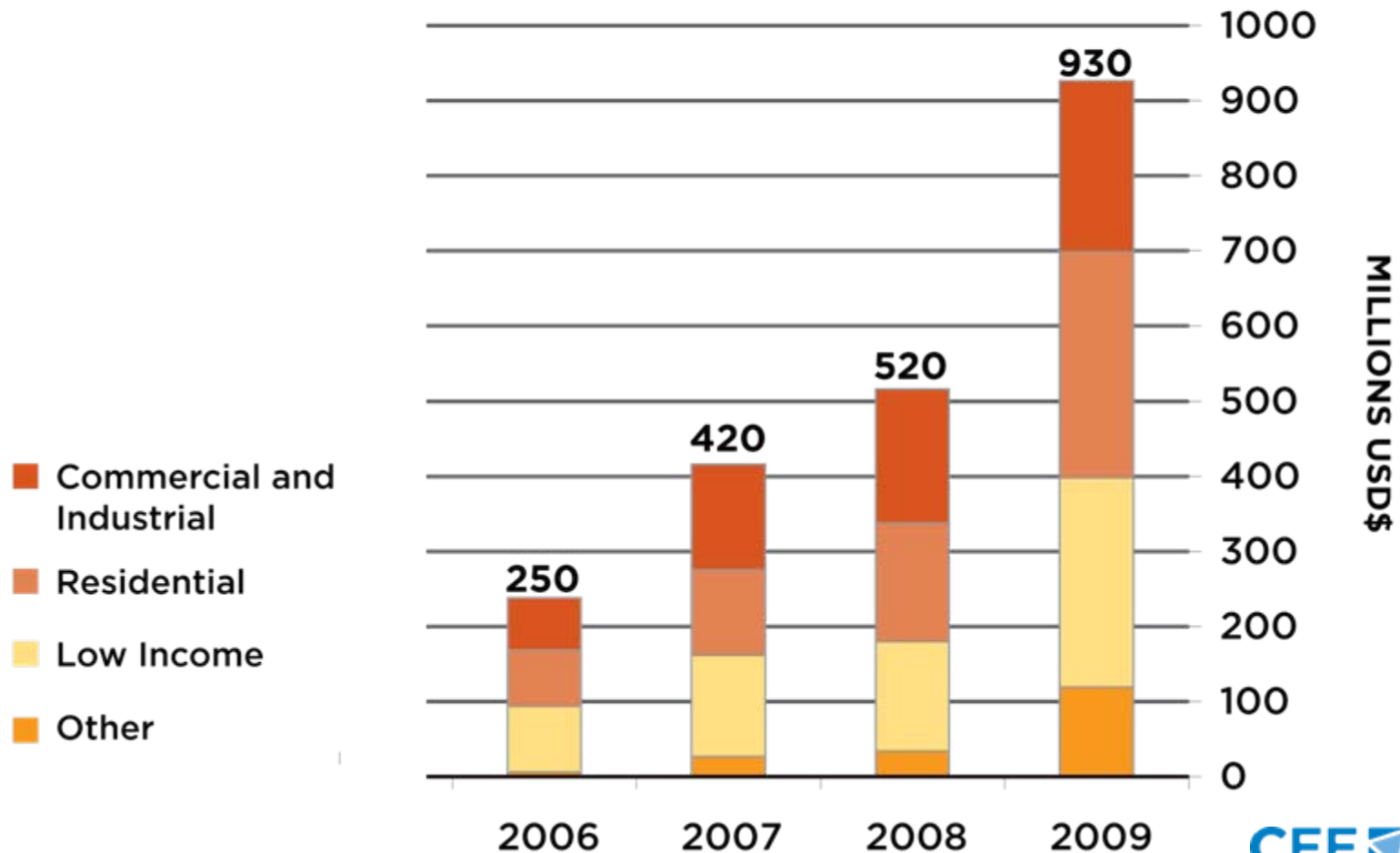


Binational Gas Budgets Hit \$1 B



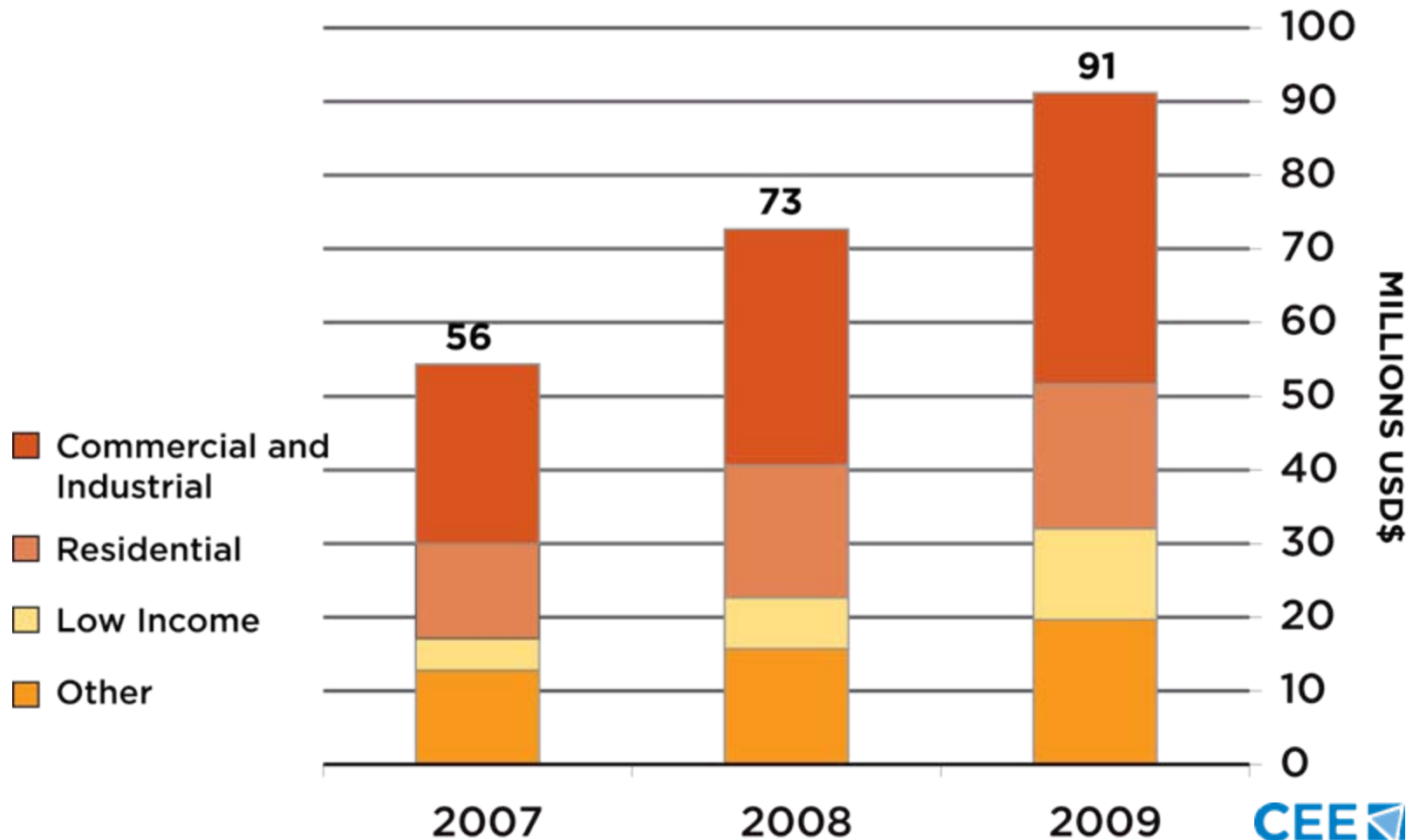
US Gas Budgets Nearly Quadruple

United States Gas Budgets



Canadian Gas up 75% since 2007

Canadian Gas Budgets



2008 Expenditures Parallel 2008 Budget

▼ 2008 Combined Expenditures:

United States	\$ 3.9 Billion US
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Canada	<u>0.5 Billion US</u>
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	\$ 4.5 Billion US
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▼ 2008 Combined Budget: \$ 4.5 Billion US

CEE Members' 2008 Savings Impacts

▼ 93,000 GWh
electricity +
▼ 180,000,000
therms gas

=

▼ 54 million tons of
CO₂
▼ \$8.4 billion in
avoided electric
gas expenditures

Equivalent to . . .

- ▶ Annual emissions of
 - Nearly 10 million passenger vehicles, or
 - Nearly 12 coal-fired power plants, or
- ▶ Carbon sequestered annually by more than 12 million acres of pine forest

Reports & Data to be Posted Soon at www.cee1.org

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