



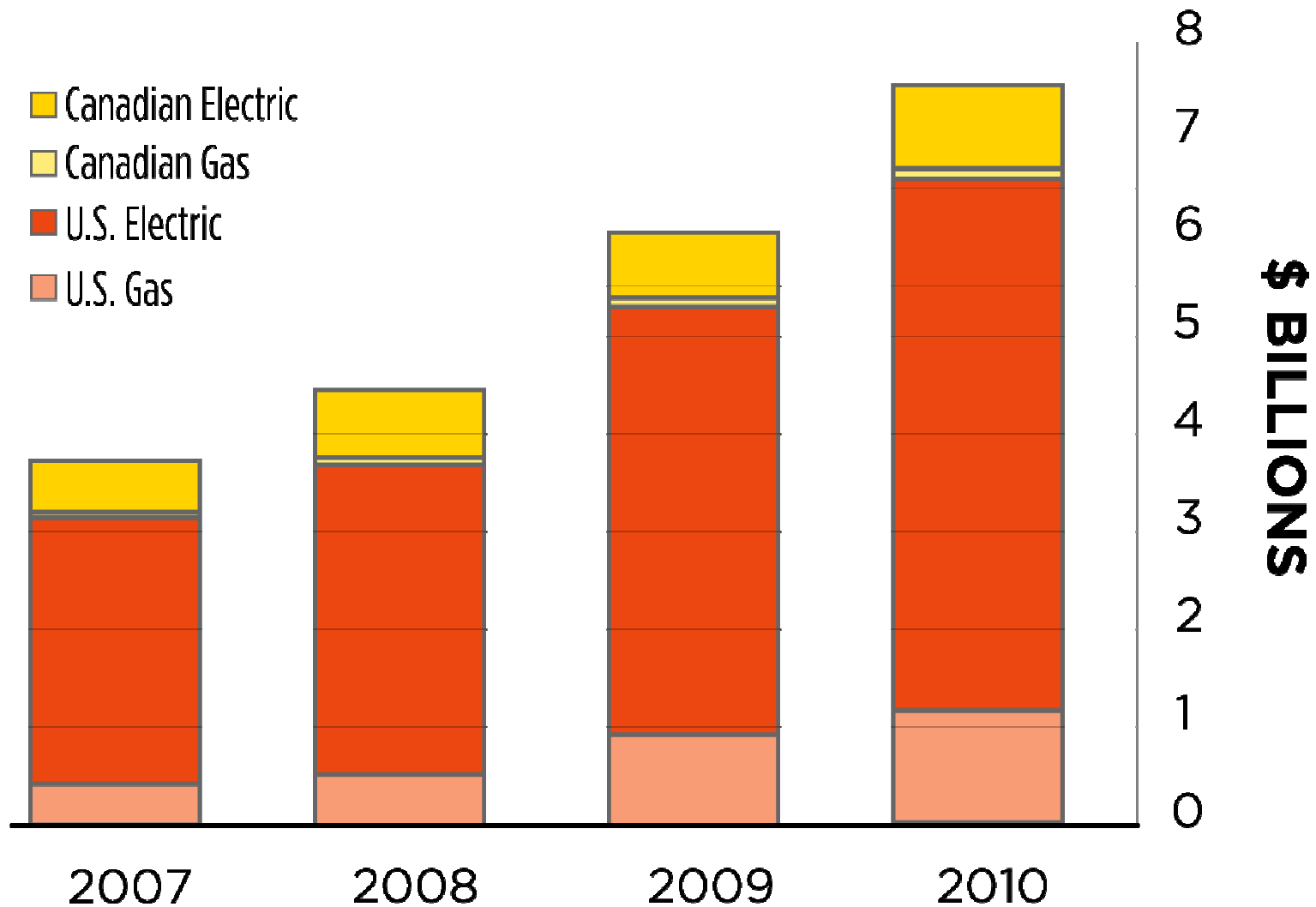
The Growing Efficiency Program Industry

CEE 2010 Annual Industry Data

Gene Rodrigues
CEE Board President
September 16, 2010
Chicago, Illinois

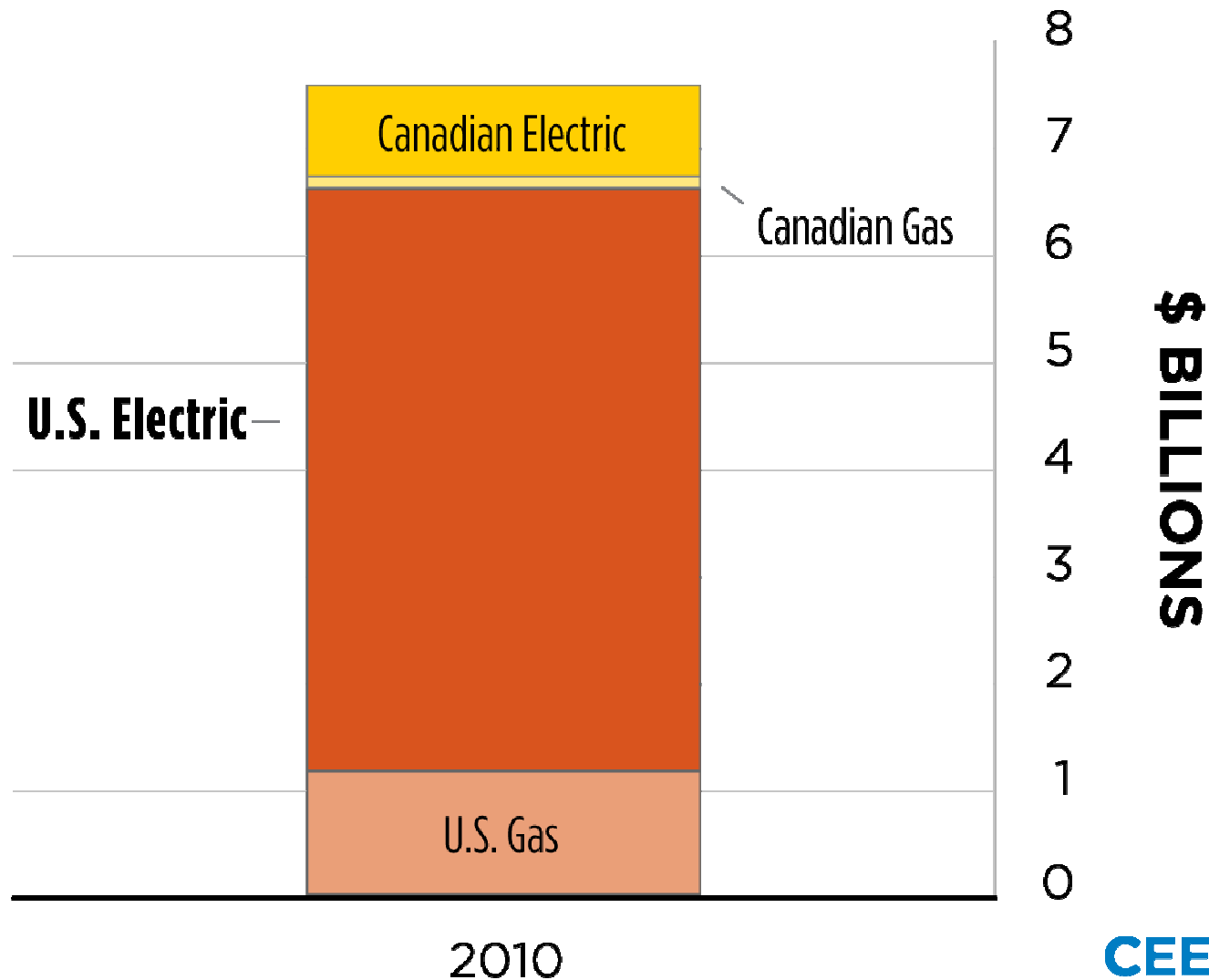


2010 DSM Budgets Grow Again to \$7.5 Billion

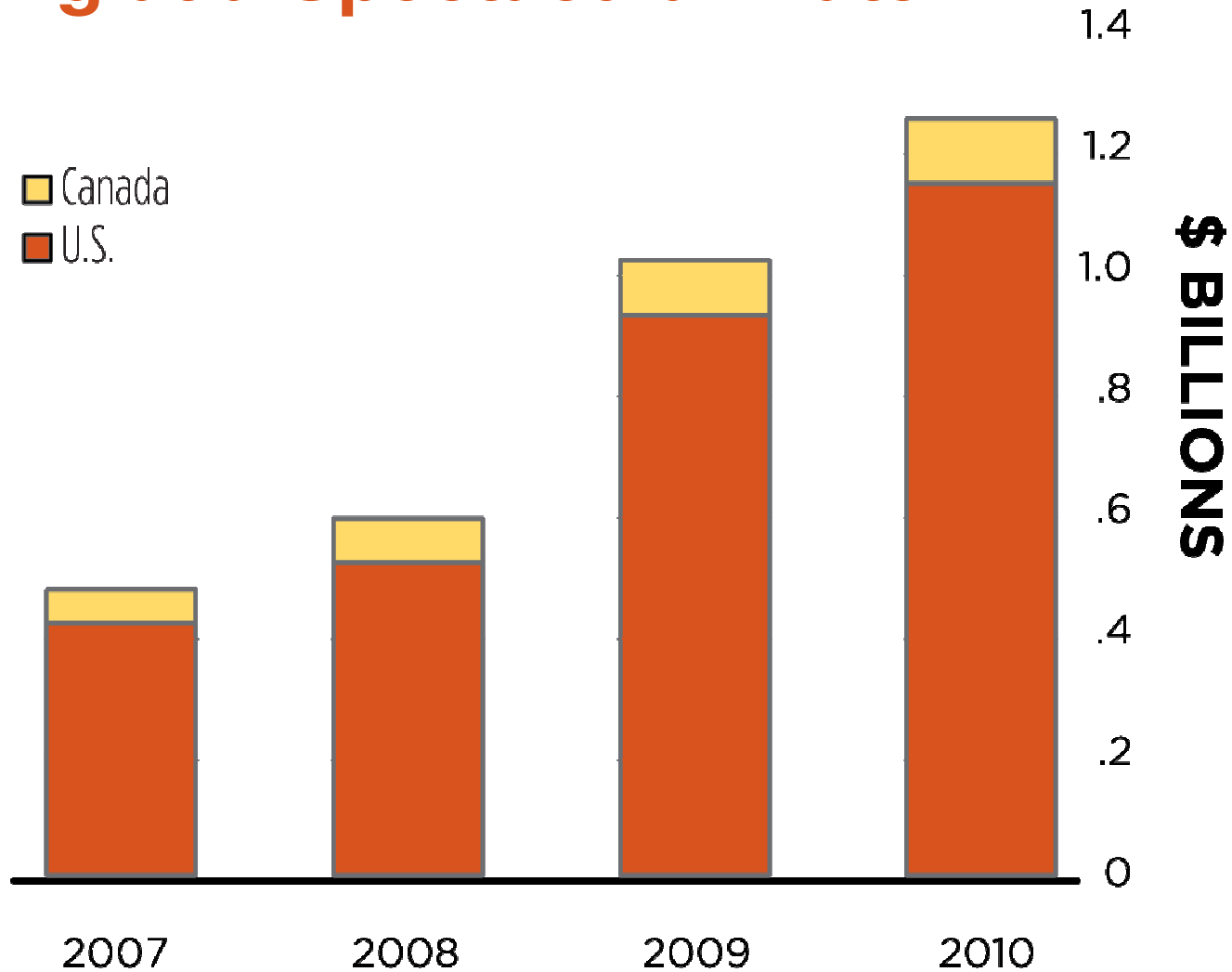


Total U.S. and Canadian DSM Budgets

U.S. Electric Dominates the \$7.5 Billion DSM Program Industry



But North American Gas Programs Growing at a Spectacular Rate



U.S. and Canadian Gas DSM Budgets

Where is it coming from?

U.S. Electric DSM Industry is \$5.4B

- ▶ California (\$1.5B) and New York (\$.6B) account for **\$2B (39%)**
- ▶ Next **\$1.2B** comes from FL, MA, NJ, OH, PA (\$300M–\$150M) **(22%)**
- ▶ Another **\$1.2B** from WA, CT, TX, IA, IL, MD, MN, BPA-NEEA, WI, AZ, OR **(22%)**
- ▶ Remaining **\$1B** from 26 states <\$1M–\$85M **(18%)**

Growth Comes From New and Existing States

10 States Contribute Over 90%

State	Growth in Millions	Size in Millions
California	\$281	\$1,500
New York	\$215	\$600
Pennsylvania	\$150	\$151
Ohio	\$148	\$172
Massachusetts	\$105	\$281
Illinois	\$51	\$116
Minnesota	\$43	\$111
Arizona	\$38	\$96
Maryland	\$38	\$114
Oklahoma	\$27	\$31

Where is it coming from?

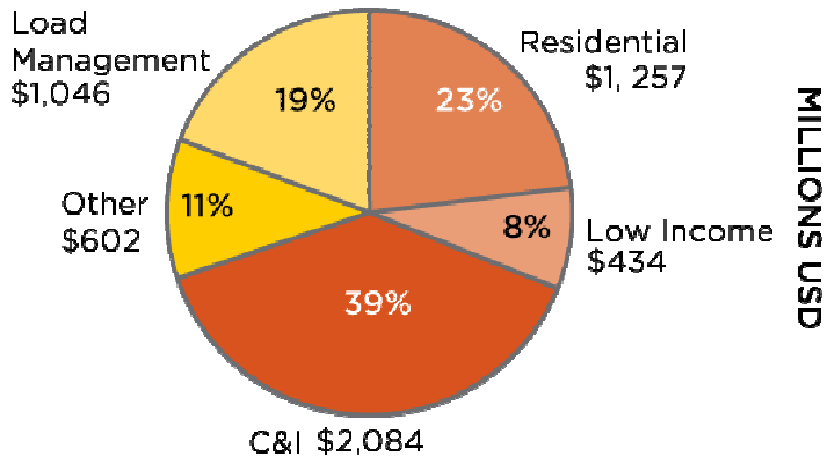
Canadian Electric DSM Industry is \$.9 Billion*

- ▶ Ontario (\$364M) and Quebec (\$249M) account for \$613M (68%)
- ▶ Next \$200M comes from BC (22%)
- ▶ Remaining \$85M comes from MB, NS, SK, NL, and AB (10%)

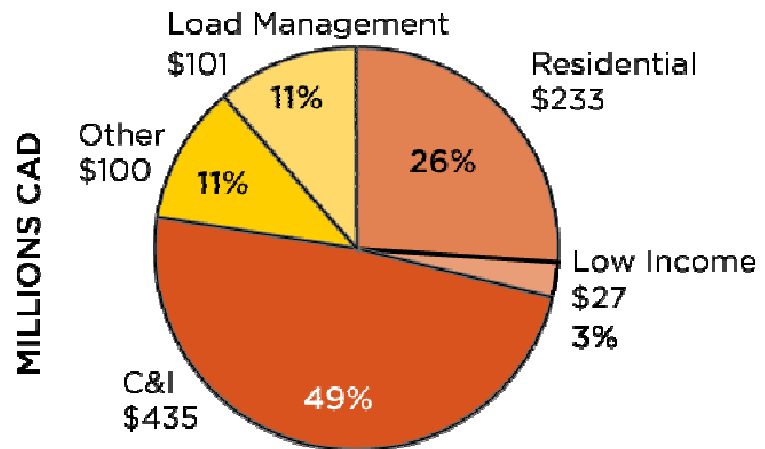
* Budgets are reported in Canadian dollars

CEE Works with Industry Partners in Electric Market Sectors

U.S. Electric Program Budgets by Customer Class 2010

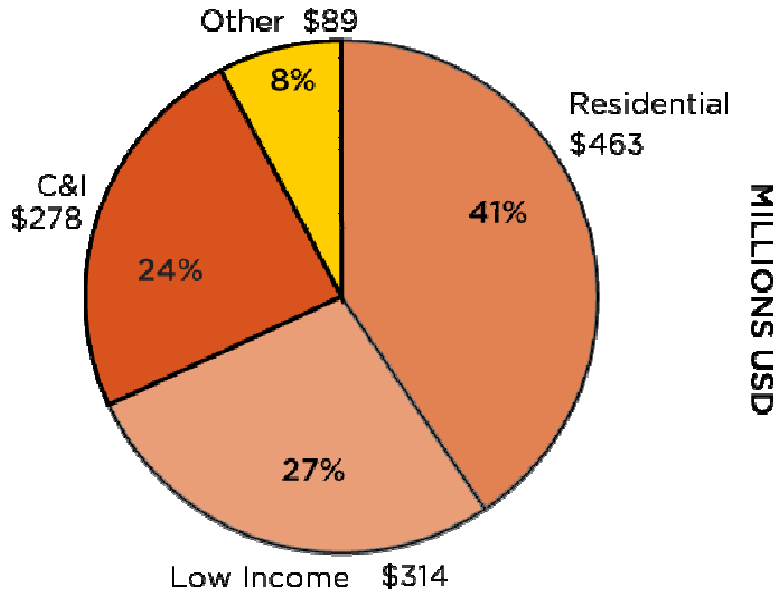


Canadian Electric Program Budgets by Customer Class 2010 (CAD)

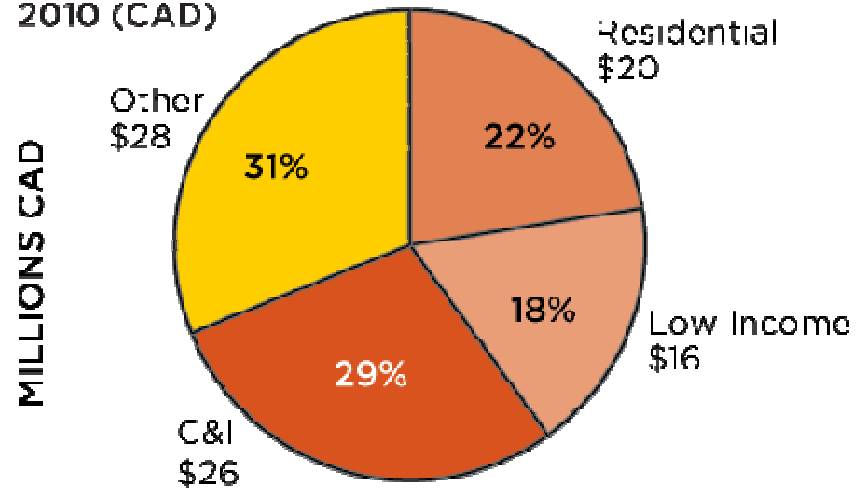


And in Gas Markets

U.S. Gas Program Budgets by Customer Class
2010



Canadian Gas Program Budgets by Customer Class
2010 (CAD)



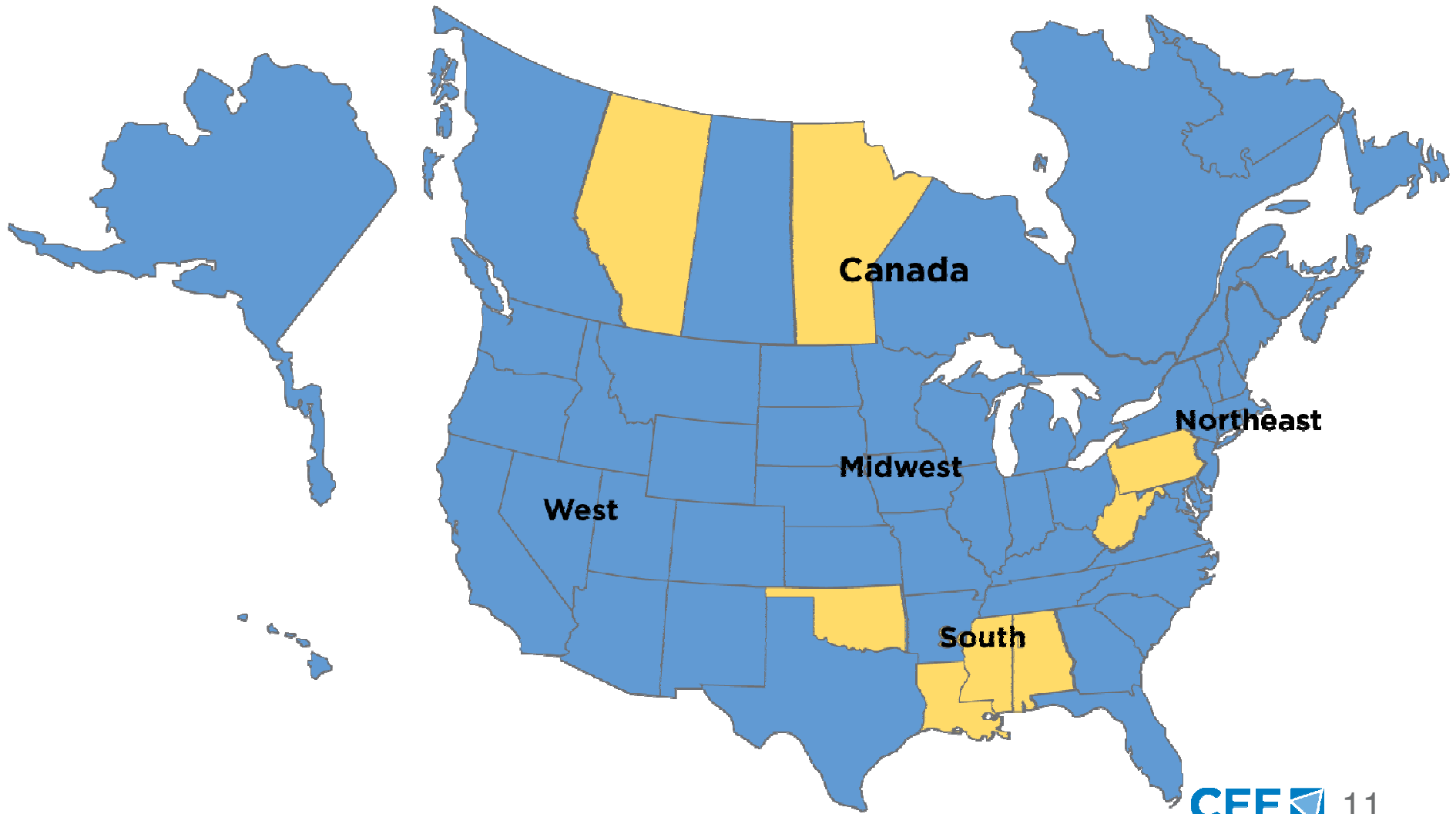
Successful Joint Data Collection

CEE worked with IEE and AGA to reduce duplication and reporting burden by using a common instrument and sharing data

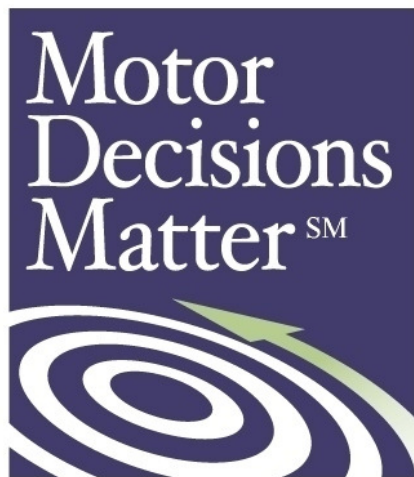
- ▶ Collected more data, more consistently and more easily for our joint members
- ▶ More robust picture of our industry
- ▶ Paving the way to a National Efficiency Program Information Center?



CEE Members Administer 83% of Total DSM Budgets or \$6.2 Billion



Platforms for CEE Members Achieve Broader Impact



EE Programs Deliver

Energy Savings*

104,000 GWh of electricity

898 million therms of gas

* Energy savings are calculated by respondents based on the definition of “annual effects” on current EIA Form 861. Energy savings reported above include a mix of gross and net effects.

EE Programs Deliver

Customer Savings*

\$10 billion

* Based on the average retail price of natural gas and electricity for the residential, commercial and industrial program sectors for the U.S. and Canada. Savings are reported in U.S. dollars.

EE Programs Deliver

CO₂ Emissions Avoided

79.3 million metric tons

Equivalent to annual CO₂ emissions of 20 coal fired power plants or carbon sequestered annually by 16.5 million acres of pine or fir forests

Source: Greenhouse Gas Equivalencies Calculator, U.S. Environmental Protection Agency

Energy Efficiency Program Industry

- ▶ Continues to grow in significance
- ▶ CEE members act as an industry
- ▶ CEE members reach out to industry partners
- ▶ Lots of challenging program and policy work to pursue

Gene E. Rodrigues
Board Chair

Watch for full reports on www.cee1.org