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Consumer Electronics Association

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**2009 ENERGY STAR® Electronics Partner Meeting**

**September 24, 2009 | Chicago, IL**

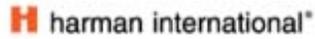
# **Trends and Perspectives**

**Douglas JOHNSON**

***Consumer Electronics Association (CEA)***

**djohnson@ce.org**

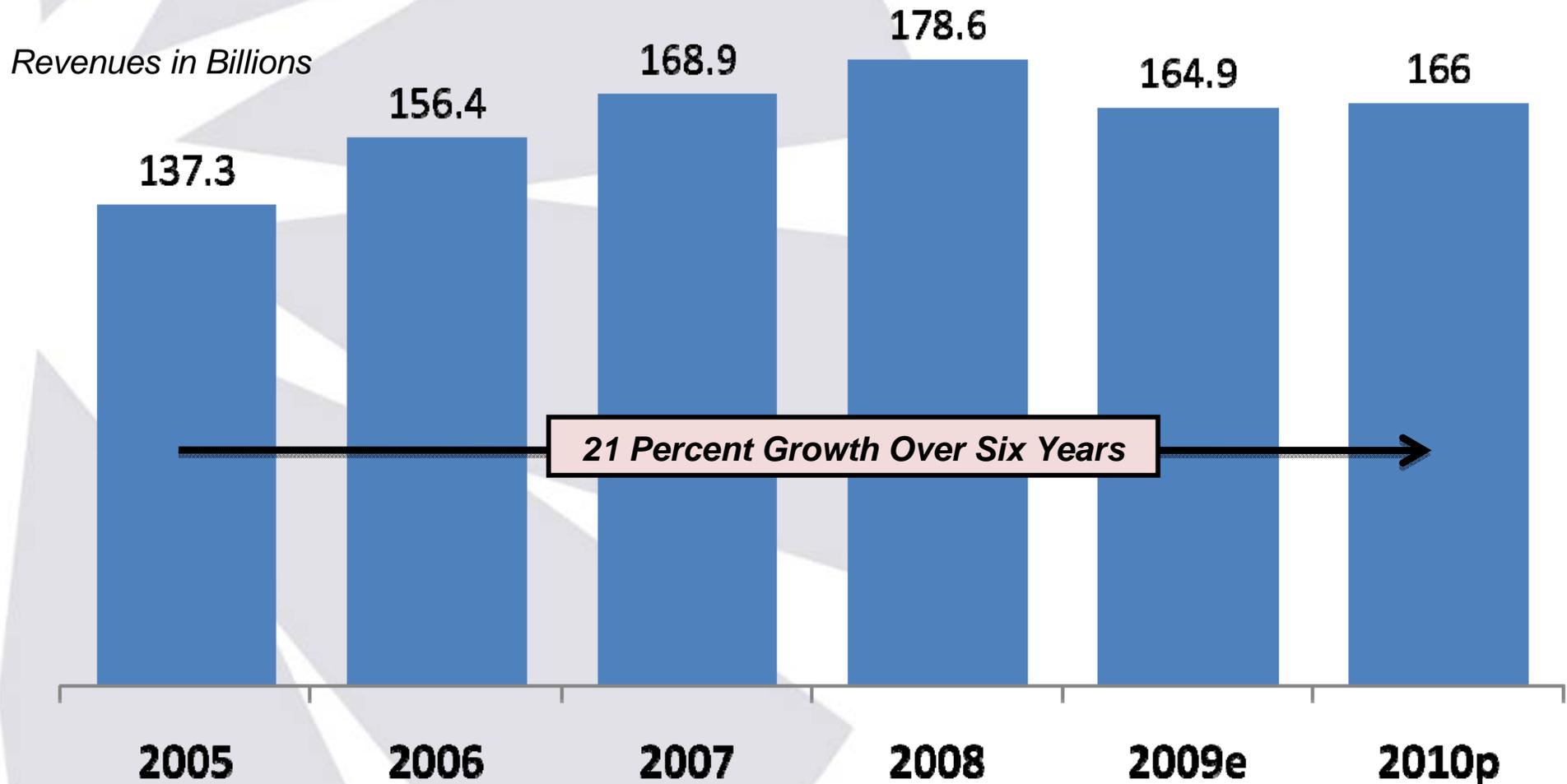






# CE Industry Sales and Growth

Year	2006	2007	2008	2009	2010
% Growth	13.9	8	5.7	-7.7	0.7



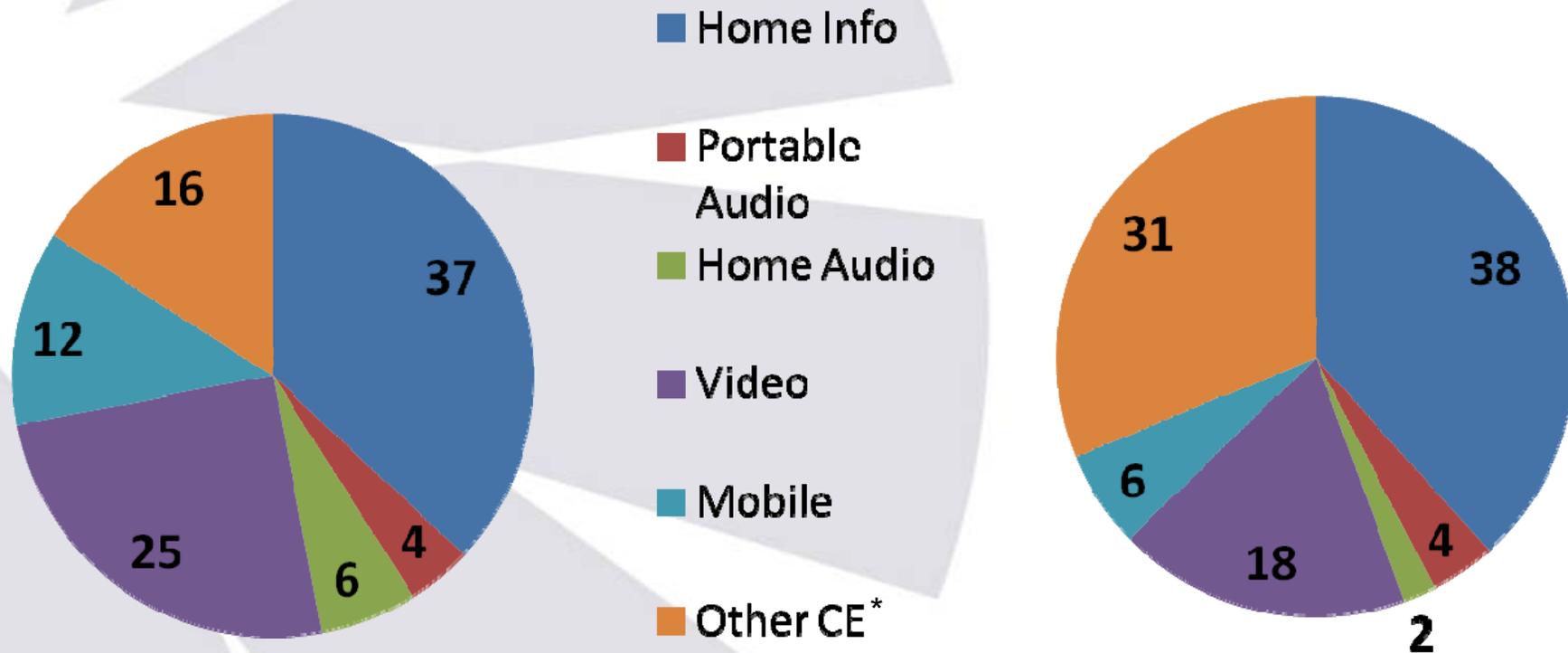
Source: CEA, CE Sales and Forecasts, July 2009

# Compositional Shifts

*Percent of Total Industry Revenues*

**1990s**

**2009**



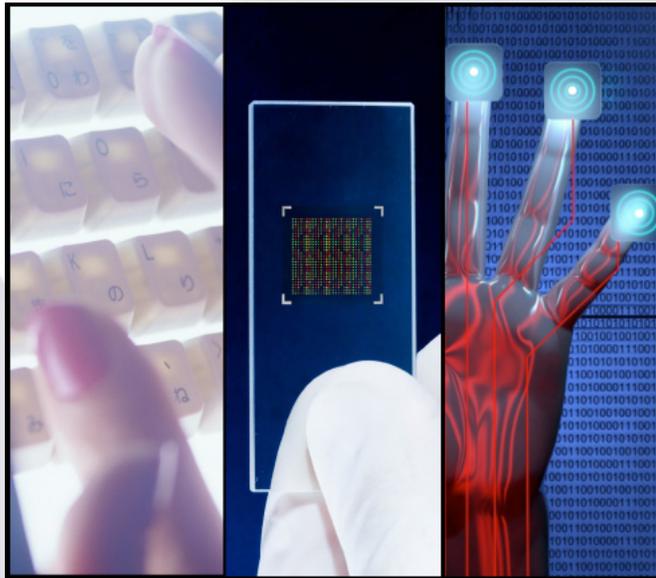
*\* Includes Gaming, Blank Media, Digital Imaging, Accessories*

# Growth Categories in 2009

Product		Unit Growth	Revenue Growth
Blu-Ray Players		112%	48%
E-Readers		106%	101%
Netbooks		85%	83%
Soundbars		65%	57%
LCD Displays		24%	2%
Smartphones		8%	3%

Source: CEA, CE Sales and Forecasts, July 2009

# Overarching Trends



- Telework and home offices
- Shifting content
- Location-based devices and services
- Embedded Internet
- Biometrics
- Nanotechnology

# Product Trends

1



## (No) Strings Attached

*Cutting cords; attaching services; shifting usage locations*

2



## Evolving Command, Control and Display

*Touch screens; voice activation; motion sensing; 3D displays*

3



## The Embedded Internet

*Localization; services; communication; commerce*

4



## Green as a Differentiator

*Materials and packaging; energy efficiency; recycling programs*

# “TechHome” Trends



- Energy management through integrated systems and home automation
- Comfort, cost control, ease-of-use
- Fifty-six percent of consumers show interest in “smart energy meters”
- Broadband networks and remote access



# Consumer Electronics Market

- Rapid innovation
- Dynamic marketplace
- Highly competitive industry
- Significant time-to-market pressures
- Significant cost pressures
- Rapid rates of market penetration
- Rapid transition from one technology to another

# Public Policy

- Encourage and support market-oriented approaches to energy efficiency in the consumer electronics sector that protect innovation, competition, economic growth and consumer choice.

# CE Industry Initiatives

- Research and analysis
- Promotion of energy-efficient products
- Voluntary market-oriented programs
- Standards developed by industry
- Consumer education
- Energy use disclosures



# Context

- Energy efficiency policy is formative
- Similar policy activity at all levels of government (local, national, regional and international): Are new measures needed? Are existing programs working?
- Informing and educating policy makers everywhere is critical

# Challenges

- ENERGY STAR program policy shift from efficiency to consumption?

# Challenges

- Provisions in H.R. 2454 (“American Clean Energy and Security Act of 2009”): Rating system within ENERGY STAR; “Smart Grid” and ENERGY STAR
- Provisions in S. 1462 (“American Clean Energy Leadership Act of 2009”): ENERGY STAR certification/verification; marketplace verification
- Governments mandating ENERGY STAR specifications

# Opportunities

- Utility rebate incentives tied to ENERGY STAR
- Financial incentives, advertising campaigns
- Networking
- ENERGY STAR and home systems installers and integrators
- Energy use disclosures



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