Welcome!

- Overview of Appliances & Water Heaters Tracks
- Year in Review
- Preview of Plans for the Year Ahead
- Tips for Making the Most of the Meeting
### Appliances: Year in Review
#### 2009 Savings Figures – Cumulative Benefits*

<table>
<thead>
<tr>
<th>Product</th>
<th>Energy Savings</th>
<th>$ Savings</th>
<th>CO2 emissions avoided</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes Washers</td>
<td>3.0 TWh</td>
<td>$464 million</td>
<td>2.7 million metric tons</td>
</tr>
<tr>
<td></td>
<td>11 trillion btu</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refrigerator-Freezers</td>
<td>2.5 TWh</td>
<td>$281 million</td>
<td>1.7 million metric tons</td>
</tr>
<tr>
<td>Dishwashers</td>
<td>2.6 TWh</td>
<td>$419 million</td>
<td>2.4 million metric tons</td>
</tr>
<tr>
<td></td>
<td>11 trillion btu</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Air Conditioners</td>
<td>1.9 TWH</td>
<td>$217 million</td>
<td>1.3 million metric tons</td>
</tr>
</tbody>
</table>

*Source: U.S. EPA CCAPS*
## Appliances: Year in Review
### 2009 Shipments*

<table>
<thead>
<tr>
<th>Product</th>
<th>ENERGY STAR Shipments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes Washers</td>
<td>3.8 million</td>
</tr>
<tr>
<td>Refrigerator-Freezers</td>
<td>2.9 million</td>
</tr>
<tr>
<td>Dishwashers</td>
<td>3.6 million</td>
</tr>
<tr>
<td>Room Air Conditioners</td>
<td>2.1 million</td>
</tr>
</tbody>
</table>

*2010 Expected to be Unprecedented Success
  - Appliance rebate program
  - Record participation in appliance promotions
  - Innovative product launches

*Source: U.S. EPA CCAPS
Appliances: Looking Forward

- New Challenges and Opportunities
  - Enhanced program integrity
  - Expanded ENERGY STAR program
  - New Partners and Roles

- Exciting Year Ahead! Appliance Program Will Be:
  - Promoting ENERGY STAR Campaign
  - Focusing on recycling
  - Leveraging new rebate and promotional opportunities
  - Scoping additional products
  - Differentiating top performers
Appliances: Looking Forward

• New Products of Interest
  – Ranges
  – Dryers

• “The only thing that is constant is change…”
  – New negotiated efficiency standards
  – Revised test procedures
  – Scheduled changes in dishwasher, clothes washer categories for ENERGY STAR
  – Room air conditioners, refrigerators under review
Appliances Track - Today

Main Hall (Grand Ballroom)
11:00 am - 4:00 pm   Appliance Manufacturer Marketing Summits (by invitation)

Special Programs (Directors Row H)
11:00 – 11:30 am   Recycling with RAD (Repeats at 2:00pm)
1:00 – 1:30 pm   Marketing and Rebate Opportunities
1:30 – 2:00 pm   Applying for Manufacturer Partner of the Year
3:30 – 4:15 pm   Re-Cap of Rebate Success & New Opportunities
4:30 – 5:00 pm   Appliances Testing and Verification

Exhibit Hall
10:00 am – 5:30 pm   Open to attendees

Evening Reception (Denver Center for the Performing Arts)
6:45 pm   Doors open
Appliances Track - Tomorrow

**Main Track (Directors Row H)**

8:30 – 10:30 am  ENERGY STAR Appliances & Specifications
11:00 – 11:30 am  Focus on Laundry: Residential Clothes Dryers
11:30 – 12:30 pm  On the Horizon: New Opportunities for Savings (Panel)

**Exhibit Hall**

8:30 am – 12:30 pm  Open to attendees

**Afternoon Sessions**

1:30 am – 2:30 pm  Networking & Meetings
Tips to Make the Most of the Meeting

• Focus on Networking
• Divide and Conquer
• Ask for assistance! We’re here for you.
Water Heaters Overview

- History
- 2009 Review
- Tier II Initial Trends
- Looking Forward
- Getting The Word Out
History

April 1, 2008
US DOE Issues Final Program Requirements

January 1, 2009
ENERGY STAR Specification Takes Affect

September 30, 2009
Product Category Transferred To US EPA

September 1, 2010
Tier II Requirement For Gas Storage Water Heaters Takes Affect
### Natural Gas 2009 Results

<table>
<thead>
<tr>
<th>Water Heater Type</th>
<th>2009 ENERGY STAR Qualified Shipments (Est. Market Share %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Gas Water Heaters</td>
<td></td>
</tr>
<tr>
<td>Gas Storage</td>
<td>650,238 (17%)</td>
</tr>
<tr>
<td>Gas Tankless</td>
<td>333,013 (88%)</td>
</tr>
<tr>
<td>Total</td>
<td>983,251 (24%)</td>
</tr>
</tbody>
</table>

$56 Million / Year Estimated Energy Savings

## Electric 2009 Results

<table>
<thead>
<tr>
<th>Water Heater Type</th>
<th>2009 ENERGYSTAR Qualified Shipments (Est. Market Share %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric Water Heaters</td>
<td></td>
</tr>
<tr>
<td>Heat Pump</td>
<td>14,734 (0.4%)</td>
</tr>
</tbody>
</table>

$4 \text{ Million} / \text{Year Estimated Energy Savings}$

Also: 6,896 solar thermal units shipped (many likely replacing electric tank water heaters)

Tier II Initial Trends

- Tier II requirement (0.67 EF) for gas storage models took affect September 1, 2010
- At the end of September:
  - 162 ENERGY STAR qualified models
  - 13 brands represented
  - 5 models meet AQMD NOx requirements
Looking Forward

• Performance criteria and test procedures: will change be coming soon?
  – ASHRAE 118.2 Committee (Looking at Tech. neutrality)
• Gas condensing units available in 2010-11?
• Federal tax credits end December 31, 2010 – possible extension?
Getting The Word Out – Coalition for ENERGY STAR Water Heaters

- Managed by The Consortium for ENERGY EFFICIENCY (CEE)
- Comprised of utilities, manufacturers, industry organizations, EPA
- Goal is to increase awareness and market share of ENRGY STAR/high efficiency water heaters
- Meets monthly to discuss strategy, activities, etc…
- Employs a variety of tactics including contractor/plumbing groups, consumer outreach, utility engagement, media outreach (print & radio), Internet marketing, collaboration with EPA on articles, trade shows, etc…
• Engage plumber/contractor groups
  – Attend key conferences and events
  – Integrate ES messaging into current trainings
  – Establish ES training (via web conference)
• Develop marketing tools based on stakeholder feedback to help plumbers and manufacturers sell more ES products
• Explore opportunities with utilities & retailers
• Media outreach to trade and consumer publications
• Collaborate with Coalition for ENERGY STAR water heaters
• Other TBD based on feedback from meeting
  – How can we be most effective in moving the market?
Getting The Word Out

• Observation: for a consumer, choosing the ENERGY STAR qualified water heater that’s right for them can be a challenge
  – Some types of water heaters may not be technically feasible at their home
  – Some types of water heaters can cost twice as much as alternatives
  – Comparing the options in terms of relative cost / benefit can be complicated
  – Finding a plumber that sells and installs ENERGY STAR qualified products can be difficult

• How do we address these challenges? What can ENERGY STAR do?

• Two sessions today
  1) Connecting the Dots: Supply Chain Integration (2:00 – 3:00 PM)
  2) Consumer is Key: Increasing Awareness (3:30 – 4:30 PM)
Other Thoughts on Meeting

• Two appliance sessions that also apply to water heaters
  • Appliances: Marketing and Rebate Opportunities (1:00 – 1:30)
  • Appliances: Applying for Partner of the Year (1:30 – 2pm)
• Attend Campaign and Communication sessions during down time
  • Great information on co-branding, marketing, and ENERGY STAR Campaigns that you can leverage
  • IT session Low Carbon IT Campaign on how to save money in your organization
• Two afternoon sessions today
• Marketing Summits tomorrow for those who signed up