



MAPPING THE ENERGY EFFICIENCY INDUSTRY

CEE ANNUAL INDUSTRY REPORT 2014

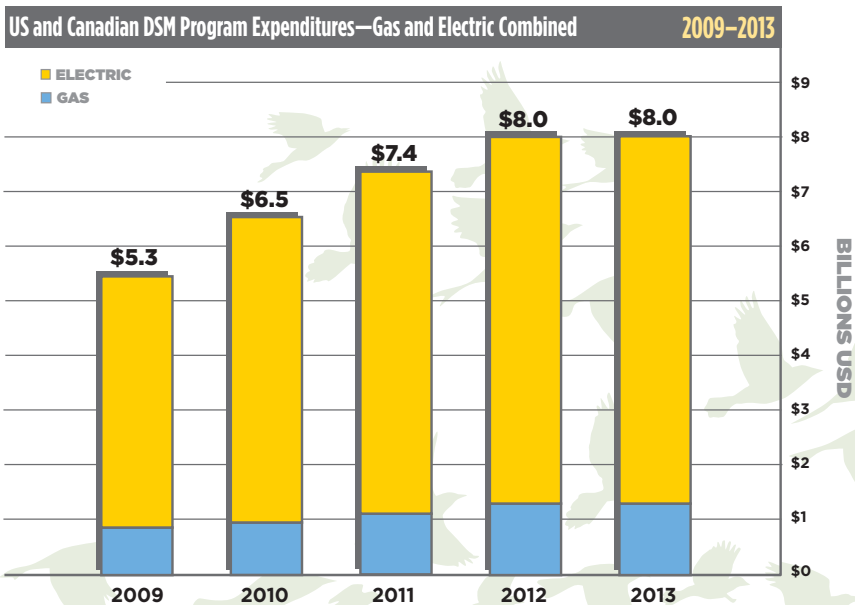
CEE  SM
Consortium for Energy Efficiency

Investments in Efficiency Stable

CEE surveyed 347 utility and nonutility program administrators operating efficiency programs in 50 states and nine Canadian provinces. The CEE Annual Industry Report provides the most extensive known research on program funding and impacts.

2013 investment in demand side management, measured as expenditures, stabilized at \$8 billion. US and Canadian program administrators spent over \$1.02 billion from all sources—over \$1 billion collected from ratepayers—on demand response programs. Comparison of 2013 and 2014 survey respondents shows a one percent increase in expenditures.

DSM 2013 expenditures represented 0.04 percent of US GDP and 0.05 percent of Canadian GDP.



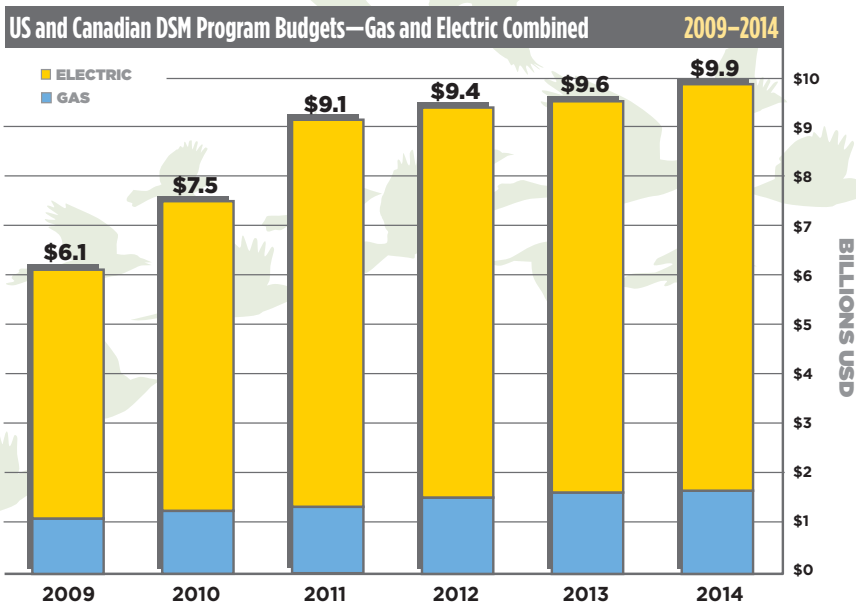
Download the whole report from the CEE website.

cee1.org/annual-industry-reports

Mapping program administrator data into an aggregate report of funding and savings has been a project CEE members value and that CEE is pleased to perform. For example, viewed against US GDP, 2013 DSM expenditures are 0.04 percent of the total.

Budgets Increase

US and Canadian combined gas and electric DSM program budgets from ratepayer funds totaled just over \$9.7 billion out of the nearly \$9.9 billion budgeted from all sources. This represents a three percent increase over 2013 ratepayer funded budgets.



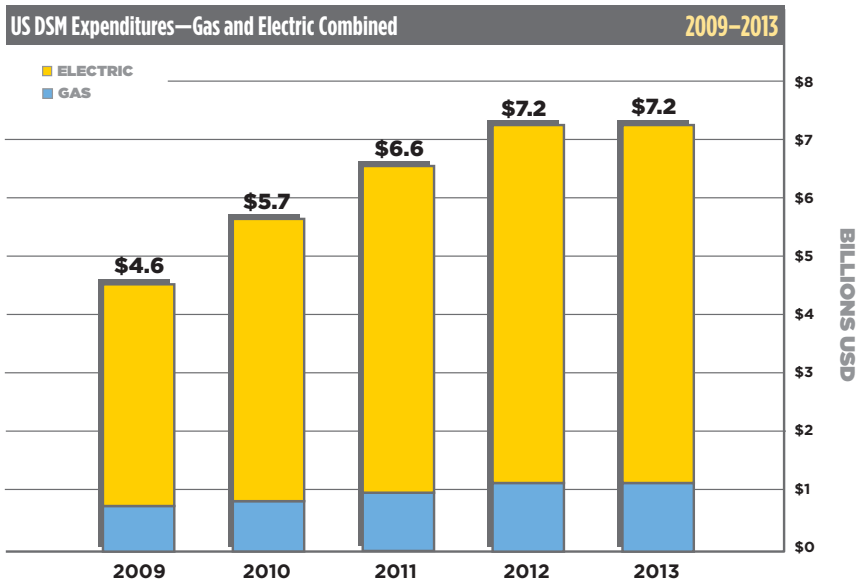
US Program Expenditures

US gas and electric DSM expenditures from all sources remained consistent with 2012 DSM expenditures, totaling \$7.2 billion.

Demand response program expenditures in the US decreased by 14 percent between 2012 and 2013, possibly due to a small number of large program administrators ending programs and fewer capacity constraints due to mild weather conditions.

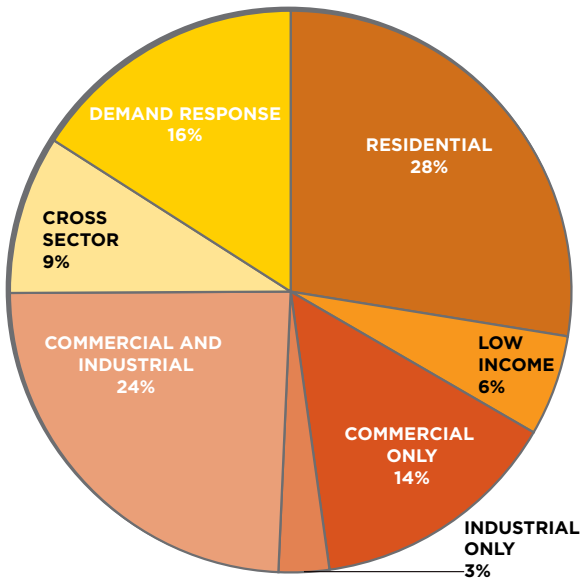
Commercial and industrial electric program expenditures rose from 37 percent in 2012 to 41 percent of total expenditures in 2013. Following C&I in allocation are residential efficiency, demand response, and low income programs.

Gas program expenditures by customer class in 2013 lead with residential efficiency at 42 percent, followed by commercial and industrial programs, then low income programs.



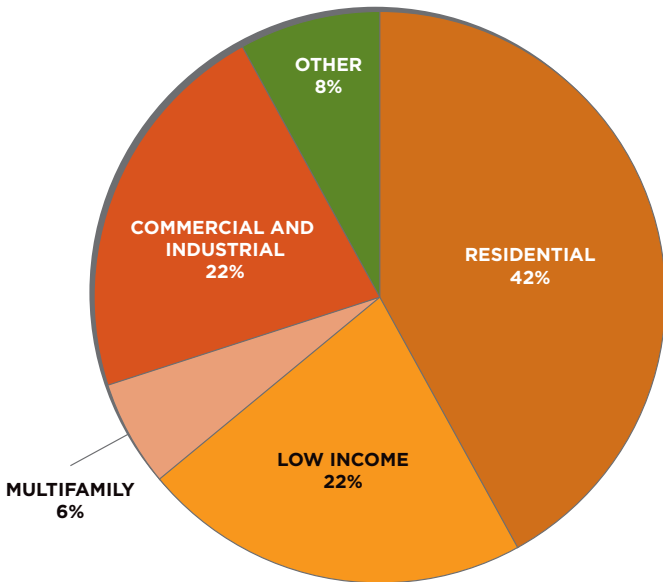
US Electric DSM Expenditures by Customer Class

2013



US Natural Gas Expenditures by Customer Class

2013

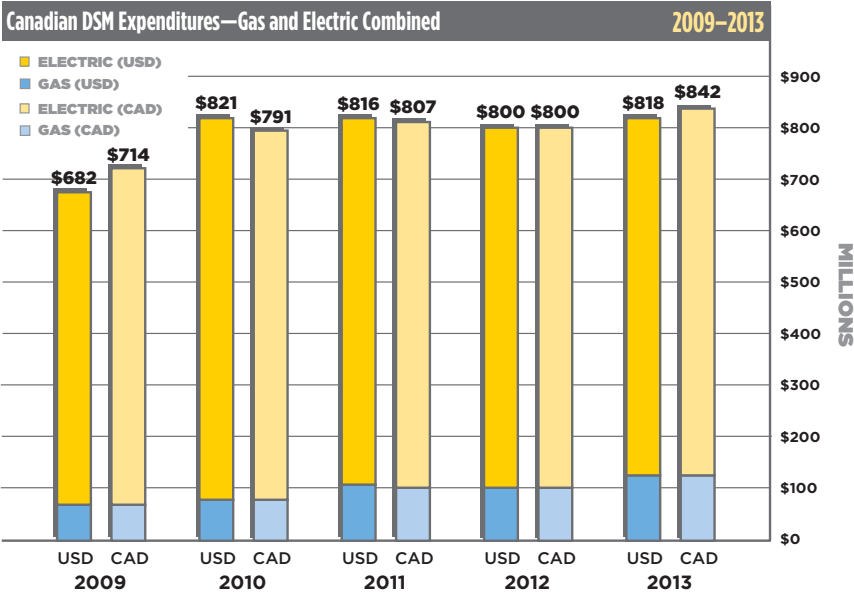


Canadian Program Expenditures

Canadian gas and electric DSM program expenditures increased in 2013, reaching \$818 million USD, \$842 million CAD, five percent over 2012. Adjusted for inflation, this is a four percent increase.

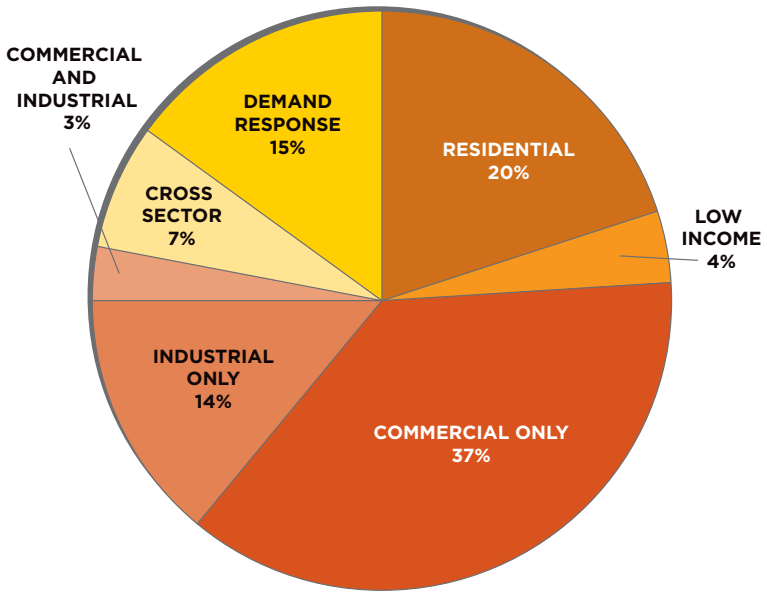
When electric expenditures are broken out by customer class, commercial and industrial programs received the largest share in Canada, 54 percent, noticeably higher than the US. This is followed by demand response programs at 15 percent, residential programs at 20 percent, and low income programs at four percent.

Commercial and industrial programs accounted for 45 percent of total Canadian natural gas efficiency program expenditures, followed by residential programs, with 17 percent, and low income programs, with 17 percent.



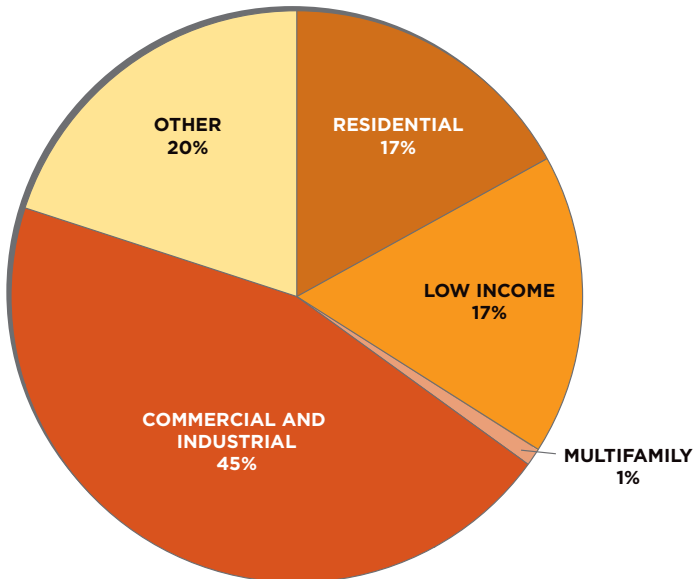
Canadian Electric DSM Expenditures by Customer Class

2013



Canadian Natural Gas Expenditures by Customer Class

2013



SAVINGS

US and Canadian programs report gross savings of over **25,000 GWh** of electricity and nearly **473 million therms** of gas in 2013, resulting in an aggregate **20 million metric tons of avoided CO₂ emissions**. The value to ratepayers was approximately **\$2.92 billion**.

About the CEE Annual Industry Report

Nine years ago, the Consortium for Energy Efficiency initiated a survey of efficiency program administrators to explore the size and momentum of the US and Canadian industry by measuring program spending and savings. Due to generous membership participation along with others funded by ratepayer dollars, CEE is able to collect data directly from program administrators, creating a consistent and accurate dataset.

As CEE and AGA hone the surveys year after year, designers and respondents use terminology more consistently and with more detail. For example, in 2014, the percentage of US electric DSM programs reported as “not broken out” significantly decreased as program administrators could provide estimates of expenditures fitting the program typology.

Further analysis, data, this brochure, and charts are available for download on the CEE Forum, ceeforum.org, and on the public site, cee1.org.

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Working Together, Advancing Efficiency

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