LBNL-56380 (2004)

2004 Status Report
Savings Estimates for the ENERGY STAR® Voluntary Labeling Program

Carrie A. Webber, Richard E. Brown, and Marla McWhinney

Lawrence Berkeley National Laboratory
Mail Stop 90-4000
1 Cyclotron Road
Berkeley, CA 94720
(510) 486-5164
fax: (510) 486-4247

March 9, 2004

Ernest Orlando Lawrence Berkeley National Laboratory

ABSTRACT

ENERGY STAR® is a voluntary labeling program designed to identify and promote energy-efficient products, buildings and practices. Operated jointly by the Environmental Protection Agency (EPA) and the U.S. Department of Energy (DOE), ENERGY STAR labels exist for more than thirty products, spanning office equipment, residential heating and cooling equipment, commercial and residential lighting, home electronics, and major appliances. This report presents savings estimates for a subset of ENERGY STAR labeled products. We present estimates of the energy, dollar and carbon savings achieved by the program in the year 2003, what we expect in 2004, and provide savings forecasts for two market penetration scenarios for the periods 2004 to 2010 and 2004 to 2020.

The target market penetration forecast represents our best estimate of future ENERGY STAR savings. It is based on realistic market penetration goals for each of the products. We also provide a forecast under the assumption of 100 percent market penetration; that is, we assume that all purchasers buy ENERGY STAR-compliant products instead of standard efficiency products throughout the analysis period.

Acknowledgments

This work was supported by the U.S. Environmental Protection Agency, Climate Protection Division, Office of Air and Radiation, under Department of Energy contract No. DE-AC03-76SF00098. Several EPA staff have contributed to these forecasts over the years: Andrew Fanara, Craig Hershberg, Rachel Schmeltz, Steve Ryan, David Shiller, Robin Shudak, Glenn Chinery, Stephan Sylvan, Jeremy Symons, and Linda Latham. Ed Barbour (Arthur D. Little), Bill McNary (D&R International) and Sarah Bretz (LBNL) also contributed to the analysis.

Introduction

This paper presents past and predicted savings for the ENERGY STAR® labeling program, a program operated jointly by the U.S. Environmental Protection Agency (EPA) and the U.S. Department of Energy (DOE). Since 1992, the ENERGY STAR label has been used to promote high efficiency office equipment, heating and cooling equipment, appliances, lighting, windows, transformers, buildings, and commercial kitchen equipment, among other product areas. The ENERGY STAR program also encompasses a new homes program, a home improvement program, and a commercial buildings program. This analysis focuses only on labeled products. Table 1 shows EPA's product labels and related programs and indicates which are covered by this report.

Our forecast of future savings extends through 2020. We include both a 100 percent market penetration case and a target market penetration case using the market share goals used by EPA and DOE.

The ENERGY STAR® Labeling Program

ENERGY STAR is a voluntary labeling program operated jointly by EPA and DOE. Those agencies enter into agreements with manufacturers that allow the manufacturers to promote products that meet certain energy-efficiency and performance criteria through use of the ENERGY STAR label. EPA and DOE have focused their efforts in areas where efficiency improvements can be achieved while offering the same or improved level of service. However, the ENERGY STAR label does not constitute an endorsement of the product by EPA or DOE.

The EPA launched the ENERGY STAR program in 1992 with computers and monitors. In 1993, the program was extended to include printers. The goal was to promote energy-saving features already common in laptop computers for use in desktop devices. These labeled products soon dominated the market, largely due to President Clinton's issuance of Executive Order 12845 in 1993 requiring that microcomputers, monitors and printers purchased by federal agencies be ENERGY STAR-compliant. The sheer size of the federal market pushed manufacturers to participate in the program. Now we estimate that 95 percent of monitors and 98 percent of computers sold are ENERGY STAR-compliant. In 1994, fax machines were added to the labeling program, followed by copiers, residential heating and air conditioning equipment, thermostats, and transformers in 1995.

In 1996, DOE agreed to work jointly with EPA to promote energy efficient products using the ENERGY STAR logo. In 1996, DOE introduced ENERGY STAR labels for refrigerators, room air conditioners and dishwashers. Because energy efficiency involves both environmental protection and energy policy, the DOE/EPA partnership was an important step in developing and expanding ENERGY STAR.

Table 1. ENERGY STAR Products and Programs

	Covered in this report?		Covered in this report?
Computers	Y	Ceiling Fans	Y
Monitors	Y	Residential Lighting	Y
Printers	Y	Exit Signs	Y
Fax machines	Y	Traffic	Y
Scanners	Y	CFLs	Y
Copiers	Y	Clothes Washers	Y
MFDs	Y	Dishwashers	Y
TVs	Y	Room Air Conditioners	Y
VCRs	Y	Residential Refrigerators	Y
TV-VCRs	Y	Residential Freezers	Y
Audio Equipment	Y	Dehumidifiers	Y
Set-top Boxes	Y	Bottled Water Coolers	Y
Telephony	Y	Commercial Refrigerators and Freezers	Y
Air-Source Heat Pumps	Y	Hot Food Holding Cabinets	Y
Geothermal Heat Pumps	Y	Commercial Steam Cookers	Y
Central Air Conditioning	Y	Commercial Fryers	Y
Gas-Fired Heat Pumps	N	Cold Beverage Vending Machines	Y
Gas Furnaces	Y	Windows	N
Oil Furnaces	Y	Roofs	Y
Gas Boilers	Y	Transformers	Y
Oil Boilers	Y	Homes	N
Programmable Thermostats	Y	Buildings	N
Exhaust Fans	Y	Home Improvement Program	N

Also in 1996, EPA introduced labels for exit signs, insulation and residential boilers. The following year, scanners, multi-function devices[1] and residential lighting fixtures were added to EPA's labeled products, and clothes washers were added to DOE's suite of products. In 1998 EPA introduced ENERGY STAR TVs and VCRs and DOE introduced an ENERGY STAR label for windows. EPA began labeling ENERGY STAR consumer audio, DVD players, and roof products in 1999 while DOE took on screw-based compact fluorescent lamps. Water coolers and traffic signals were added to EPA's labeling program in 2000, followed by set-top boxes, dehumidifiers, ventilation fans, ceiling fans, and reach-in refrigerators and freezers in 2001 and telephony in 2002. In 2003, EPA introduced commercial fryers, commercial hot food holding cabinets, and commercial steam cookers. Refrigerated beverage vending machines were added to the program in 2004.

Several of these products are not included in this analysis (see Table 1). Two labeled products were omitted because they have been dropped from the program: gas-fired heat pumps in 2000 (the product was no longer commercially available) and insulation in 2001 (insulation was incorporated

[1] The term multifunction device (in the context of office equipment) refers to a device that combines copying, printing, scanning and/or fax functions in a single device. Under the ENERGY STAR program the term refers to the subset of such devices that have multi-page copying as their primary function. Digital copiers that can be upgraded to have printing functions are also covered.

in EPA's Home Improvement Program and was dropped as an individual product label). Windows have not yet been added to the analysis. The ENERGY STAR Homes, Buildings, and Home Improvement programs, while part of the ENERGY STAR family of programs, are separate from ENERGY STAR labeled products and are not addressed in this report.

EPA and DOE continue to research products and industries in search of new program opportunities. Factors evaluated include the potential for improvements in unit energy savings, the size of the stock, turnover rates and the structure of the industry (Sanchez, et al. 2000).

Historically, the focus of the ENERGY STAR program has been on energy savings and carbon emissions reductions. During California's energy crisis in 2000, however, interest shifted to the impact of conservation programs on electrical system reliability. The peak impacts of an ENERGY STAR label depend on the timing of the savings (do they occur on or off peak), which in turn depends on the daily usage pattern of the labeled product. The products with high peak savings may therefore be different from the products with high annual energy savings. The current interest in reliability has not changed how EPA and DOE choose products for labeling; however, it has added an additional dimension to evaluating the program.

Methodology

At the core of the ENERGY STAR savings calculations is a stock accounting that calculates the number of ENERGY STAR units in place each year that can be attributed to the ENERGY STAR program. We segment sales of each product first into non-ENERGY STAR and ENERGY STAR units. Sales of ENERGY STAR-qualifying units are further divided into those that would have been sold even without the program and those that can be attributed to the program. The ENERGY STAR savings forecast includes only the savings for ENERGY STAR units attributable to the program. Figure 1 illustrates the sales segmentation.

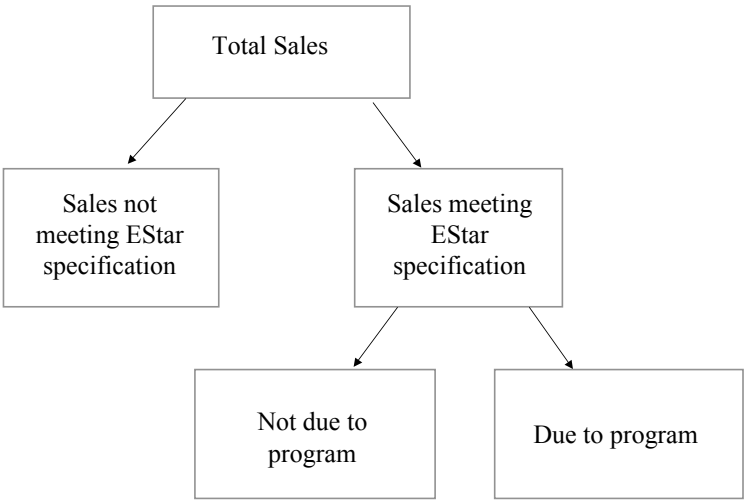
The market share of ENERGY STAR units not due to the program is a forecast based on historic efficiency trends. "Business-as-usual" is represented by non-ENERGY STAR sales and ENERGY STAR sales not due to the program, and is characterized both by a unit energy consumption and a market share for each segment. Business-as-usual efficiency improvements can be modeled directly as a change in the annual unit energy consumption (UEC) of either of these segments. We can also model business-as-usual efficiency improvements as a shift over time from non-ENERGY STAR units to ENERGY STAR units not due to the program.

In general, we rely on a forecast of increasing market share of ENERGY STAR units not due to the program to capture changes in business-as-usual efficiencies (see below). This is because for most products there is insufficient data on historic efficiency trends to create a credible UEC forecast.[2] For most products the annual unit energy consumption for non-ENERGY STAR units is assumed to be constant unless the ENERGY STAR requirement is tightened or (if applicable) the efficiency standard for the product changes during the forecast period.[3] In cases where both the non-ENERGY STAR UEC

[2] VCRs, telephony and exit signs are exceptions to this, and we do model the average efficiency of non-ENERGY STAR units does changing over time.

[3] While we do not speculate about future changes to standards, we do account for the effects of past, present, and finalized future standards. Standards are considered to be part of the reference case for the purpose of analyzing the

Figure 1. Segmentation of product sales in the CCAP model



and the ENERGY STAR UEC are changing over time, it is possible for unit energy savings to increase, decrease or remain the same.

Even though we do not fully model efficiency improvements in non-ENERGY STAR units, the average efficiency of "business-as-usual" units changes over time based on our forecast of the market share of ENERGY STAR units not due to the program. For example, from 1996 to 2000, the UEC for non-ENERGY STAR refrigerators was 744 kWh/year and the UEC for ENERGY STAR refrigerators was 595 kWh per year (note that both the minimum efficiency standard and the ENERGY STAR requirement changed in 2001). The business-as-usual market share of ENERGY STAR refrigerators was forecast to increase from 8 percent to 10 percent over this period. The weighted average business-as-usual energy consumption declined from 731 to 728 kWh/year over this period.

Some products have ENERGY STAR features, such as low power modes when the device is idle, that do not accrue savings unless the feature is enabled.[4] In the past, manufacturers sometimes shipped devices with ENERGY STAR features disabled. Manufacturers are now required to ship units enabled, so no user action is required to achieve energy savings. However, users may disable features for various reasons, such as slow recovery times from low-power modes or (for PCs) incompatibility with computing networks. Metering of ENERGY STAR computers suggests that less than ten percent have their power-saving features enabled (Roberson et al. 2004). To account for the enabling factor, we calculate separate UECs for products that are enabled and products that are not enabled and then calculate a weighted average UEC based on our estimate of the enabling rate.

Using annual installations of energy-saving units due to the program, we calculate the number of ENERGY STAR units in place in each year (due to the program) by applying a simple retirement model. Devices are assumed to remain in place and accrue savings for a period equal to the average lifetime of the product (given in Table 4 below), then are retired.

Because the unit energy savings (UES) for some products changes over time, we cannot simply multiply the number of ENERGY STAR units (due to the program) in place in each year by a single UES to get aggregate annual energy savings. Instead, we calculate the energy savings for each year's

effects of the ENERGY STAR Program.

[4] All of the savings for PCs, scanners, copiers, fax machines, and MFDs come from features that need to be enabled. Monitors and vending machines have low power modes that must be enabled, but also have active power savings. Programmable thermostats are assumed to save energy only if they are enabled (that is, programmed for automatic setback).

ENERGY STAR sales and then use our retirement function to add up the savings for all the equipment vintages in place in a given year. Aggregate energy bills are estimated using year-by-year energy prices from US DOE (1996a, 1996b, 1997b, 1998b, 1999, 2000, 2001), shown in Table 2. Energy bill savings are discounted at a 4 percent real discount rate. Carbon emissions reductions are calculated from energy savings using year-by-year carbon emissions factors. Electric heat rates (also US DOE) and carbon emissions factors for electricity (Cadmus 1998) are also shown in Table 2.

The following equations summarize our calculations for savings in year t.

$$\text{Annual Energy Savings in Year t} = \sum_{n=t-L}^{t} X_n UES_n$$

$$\text{Annual Energy Bill in Year t (Undiscounted)} = AES_t P_t$$

$$\text{Annual Carbon Savings in Year t} = AES_t C_t$$

Where

X_n = The number of ENERGY STAR units sold in year *n* due to the program

UES_n = The unit energy savings of units sold in year *n* (in kWh or MBtu)

L = product lifetime

AES_t = The aggregate annual energy savings in year *t* (in kWh or MBtu)

P_t = The energy price in year *t* (in $/kWh or $/MBtu)

C_t = The carbon emissions factor in year *t* (in kg/kWh or kg/MBtu)

When looking at reliability, the savings that matter most are those that occur when the system is constrained, typically during periods of peak demand. In most parts of the country, peak demand is driven by high summer cooling loads. ENERGY STAR room air conditioner savings tend to occur on peak, while the auto-off feature of ENERGY STAR copiers tends to save energy off peak. Other products, such as TVs, accrue fairly level savings through peak and off-peak periods.

Peak power reductions are estimated from aggregate energy savings using a conservation load factor (CLF) that relates average load savings to peak load savings for a conservation measure. CLFs for each ENERGY STAR product are shown in Table 5. Conservation load factors were obtained from previous research (when available), developed from time-of-day metered data or based on assumed

Table 2. Best Estimate Energy Prices and Carbon Emissions Factors by Year[a]

Year	Commercial Electricity Price 2000$/kWh	Residential Electricity Price 2000$/kWh	Gas Price 2000$/ MBtu	Oil Price 2000$/ MBtu	Price Source[b]	Carbon Emissions Factor for Electricity kg C/kWh	Carbon Source	Electric Heat Rate Btu/kWh	Electric Heat Rate Source
1993	0.0883	0.0945	7.45	6.76	c	0.203	k	11,019	c
1994	0.0875	0.0941	6.97	7.07	d	0.203	k	10,948	d
1995	0.0814	0.0913	6.50	6.84	e	0.203	k	10,970	e
1996	0.0808	0.0895	6.61	7.56	f	0.203	k	10,866	f
1997	0.0792	0.0872	7.11	7.43	g	0.203	k	10,978	g
1998	0.0776	0.0848	6.91	6.41	h	0.203	k	10,891	h
1999	0.0729	0.0830	6.65	6.39	i	0.203	k	10,784	i
2000	0.0754	0.0831	7.64	9.42	i	0.203	k	10,776	i
2003	0.0709	0.0774	6.65	7.62	i	0.203	l	10,703	i
2004	0.0707	0.0770	6.81	7.66	i	0.203	l	10,619	i
2005	0.0696	0.0764	6.85	7.68	i	0.203	l	10,589	i
2010	0.0678	0.0765	6.73	7.94	i	0.168	l	10,236	i
2015	0.0677	0.0757	6.84	8.43	i	0.141	l	10,008	i
2020	0.0694	0.0769	6.97	8.54	i	0.135	l	9,829	i
>2020	0.0694	0.0769	6.97	8.54	j	0.135	j	9,829	j

Notes to Table 2:
[a]Carbon coefficients for natural gas and oil are assumed to be constant throughout the period at 14.4 kg C/MBtu for natural gas and 19.75 kg C/MBtu for oil. Carbon emissions factors for electricity are marginal, not average.
[b]All prices have been converted to 2000 dollars using implicit GDP deflators from the Department of Commerce (2000).
[c]US DOE (1996a).
[d]US DOE (1996b).
[e]US DOE (1997b).
[f]US DOE (1998b).
[g]US DOE (1999).
[h]US DOE (2000).
[i]US DOE (2001).
[j]The carbon coefficient for electricity, energy prices and heat rates are assumed to remain constant after 2020.
[k]Cadmus (1998)
[l]EPA (2003).

time-of-day and seasonal operating patterns (if no metered data were available). A CLF of one indicates that energy savings are distributed evenly across peak an off-peak periods (e.g. ENERGY STAR TVs). CLFs of less than one indicate that savings are greater during peak periods (e.g. central and room air conditioners), while CLFs of more than one indicate that savings occur mostly off-peak (e.g. copier low-power and auto-off modes). Conservation load factor methodology is detailed in Koomey et al. (1990).

Several ENERGY STAR specifications have been revised since their introduction to a more stringent efficiency level. After each specification changed it is assumed that unit energy savings increase, but fewer models qualify at the new level, at least until manufacturers have a chance to revamp their product line to meet the new specification. The question arose, what happens to the models that met the old specification but not the new one? There are three possibilities: they are replaced by models that are less efficient than the old specification (recidivism), they continue to be made or are replaced

by models of similar efficiency (market transformation), or they are replaced by models meeting the new specification. If recidivism is widespread, saving may be lower under the new specification than the old. There are currently no empirical data available that would resolve this question. We incorporated market transformation effects into the model, working under the assumption that there is no recidivism. If future program evaluations determine that recidivism occurs, partial or total recidivism could be analyzed using the same modeling framework.

Forecasting Issues

Office Equipment. ENERGY STAR-labeled office equipment includes computers, monitors, fax machines, printers, copiers, scanners and multi-function devices (MFDs). The program has historically focused on reducing the power consumed by these devices when not in active use. ENERGY STAR devices automatically enter a low-power mode and/or turn themselves off after a period of inactivity. To qualify for the ENERGY STAR label, devices must incorporate low-power and/or auto-off modes, and must meet power consumption limits in those modes. In some cases, default power-saving settings are specified, such as the length of the idle period necessary to trigger a lower-power mode or a maximum recovery time from low power modes.

In addition to a low power requirement, EPA recently added a requirement (beginning in January 2005) that monitors meet an active power specification. This new active power specification was included in this forecast.

For our analysis of commercial office equipment, we used operating patterns derived from equipment audits at various locations (Piette et al. 1995; Nordman et al. 1998, Webber et al. 2001, Roberson et. al 2004). These sources provided both the time spent in each operating mode (e.g. active, standby, suspend and off), and the percent of ENERGY STAR devices that were actually enabled. Another key input was the percent of units left on after working hours. Recent nighttime audits of office buildings found that 64 percent of computers, 68 percent of CRT monitors, 82 percent of LCD monitors, 85 percent of laser printers (77 percent of all printers), 52 percent of copiers and 80 percent of MFDs were left on at night (Roberson et al. 2004). Three years earlier a similar study found that 56 percent of computers, 68 percent of monitors, 75 percent of printers and 82 percent of copiers and MFDs were left on at night (Webber et al. 2001). For residential computers and monitors, we used data from Media Metrix (2001) describing average usage of a large sample of residential computer users.

Baseline unit energy consumptions were calculated by multiplying the time spent in each power mode by the power consumption in each mode, then summing over all power modes. The unit energy consumption for ENERGY STAR products was calculated essentially the same way, although some of these products have additional power modes. ENERGY STAR products may also have different usage patterns than standard products (because of features like auto-off) and lower power levels in certain operating modes. Office equipment shipment data were obtained from Gartner (2001), IDC (2001), and Guo et al. (1998). The unit energy savings were applied to forecasts of ENERGY STAR-compliant devices to obtain aggregate savings.

As noted above, taking account of enabling rates was particularly important for office equipment. A significant number of ENERGY STAR devices, particularly computers, fail to save energy because

either their power management features are not enabled or external factors (such as computer network connections) keep the device from entering low power modes. Enabling rates (or, more accurately, power management "success rates"[5]) were obtained from the nighttime audits mentioned above. Only 6 percent of computers were observed to be in low-power mode (Roberson et al. 2004). Table 3 shows the office equipment enabling rates assumed in the analysis.

Because of different usage patterns, computers and monitors were modeled separately for homes and offices. Shipments to homes were obtained from Gartner (2001).

Residential Heating and Cooling (HVAC). The HVAC program covers air-source heat pumps, geothermal heat pumps, central air conditioners, gas and oil furnaces, gas and oil boilers, and programmable thermostats. For heating and cooling equipment, ENERGY STAR eligibility is based solely on efficiency, measured by standard test procedures such as AFUE or SEER.[6] Programmable thermostats qualify for the ENERGY STAR label because they automate what people often fail to do manually: set back their thermostats at night or when they are out of the house. Several issues arose

Table 3. Enabling Rates for ENERGY STAR Office Equipment

Product	1993	1994	1995	1996	1997	2000	2005	2010
Copiers	NA	NA	76%	76%	76%	76%	29%	29%
Facsimile	NA	NA	90%	90%	90%	90%	90%	90%
Printers	80%	90%	96%	96%	96%	96%	95%	95%
Scanners	NA	NA	NA	NA	90%	90%	60%	60%
Office Multi-Function	NA	NA	NA	NA	67%	77%	55%	59%
Office CRT Monitors	10%	15%	15%	59%	59%	59%	76%	77%
Office LCD Monitors	10%	15%	15%	59%	59%	59%	80%	81%
Office PCs	10%	15%	15%	10%	5%	5%	7%	8%
Residential Multi-function	NA	NA	NA	NA	NA	97%	94%	96%
Residential CRT Monitors	10%	15%	15%	59%	59%	59%	71%	71%
Residential LCD Monitors	10%	15%	15%	59%	59%	59%	75%	75%
Residential PCs	10%	15%	15%	15%	15%	15%	15%	15%

Notes to Table 3:
a) Enabling rates shown here represent the percent of ENERGY STAR-compliant devices assumed to be correctly configured for power management and successfully saving energy.
b) Enabling rates for 1997 to 2002 are from Webber et al. (2001); rates for 2003 are from Roberson et al. (2004). For all products except office PCs and office monitors, enabling rates are expected to remain flat after 2003. Office PC and monitor enabling rates are expected to increase over time due to outreach efforts by EPA. Enabling for multifunction devices changes over time due to the changing mix of products (speed and imaging technology).

in analyzing heating and cooling equipment, including multiple fuel types, technology substitution and program interactions.

[5] A device is said to be enabled if its power management settings indicate that the device has been programmed to go into a low-power state. Since, as discussed, some of these devices will nevertheless fail to enter a low-power state, the term "success rate" more accurately describes the share of devices that succeed in entering a low-power state. Because this distinction is not widely understood, we use the term "enabling" throughout the paper to mean the share of devices that are successfully power managing.
[6] AFUE is average fuel utilization efficiency and SEER is seasonal energy efficiency ratio.

New federal minimum efficiency standards for central air conditioners and air-source heat pumps begin in 2006. In response to the announcement of the new standard, EPA tightened the Energy Star requirement for split systems from 12 SEER to 13 SEER, beginning in 2002.

The market shares for ENERGY STAR central air conditioners and air-source heat pumps from 1996 to 2000 are from ARI (2001). Shipments of programmable thermostats are estimated based on stocks reported in the 1997 Residential Energy Consumption Survey (RECS; US DOE 1999). The market share forecast for geothermal heat pumps is an LBNL estimate, although 1995 and 1996 shipments were taken from US DOE (2000). Geothermal heat pumps are an intrinsically efficient technology, and all units are assumed to meet the ENERGY STAR efficiency level. Because of this, and because geothermal heat pumps are not yet in widespread use, increased sales of this products are modeled as displacing shipments of established products. For our model we assume they displace air-source heat pumps.

Energy bill and carbon savings both depend on the type of fuel used. In addition to their primary fuels, gas and oil furnaces consume electricity to operate fans. Programmable thermostats save energy according to the type of HVAC installed in the home. For these products, we segmented the analysis by fuel type and then added the component savings together (electricity was converted to primary energy).

Because programmable thermostats reduce the operating hours of heating and cooling equipment, they must be analyzed in conjunction with HVAC equipment to avoid double-counting savings from thermostats and efficient equipment. Because we calculate thermostat savings as a percentage of total heating and cooling energy, thermostat savings should be lower if ENERGY STAR-compliant HVAC equipment is in place. Conversely, if there is a programmable thermostat in place, replacing old equipment with an ENERGY STAR model will save less than if the thermostat was a standard one. For simplicity, we assumed that HVAC equipment is chosen first and therefore ENERGY STAR HVAC receives its full measure of savings. Programmable thermostat savings were calculated from a forecast of HVAC energy use that took into account the increasing market penetration of ENERGY STAR HVAC (we assumed the choice of a programmable thermostat was independent of the choice of ENERGY STAR HVAC). Programmable thermostat savings are therefore net of ENERGY STAR HVAC savings.

Consumer Electronics. For TVs, VCRs, audio equipment, and set-top boxes,[7] ENERGY STAR focuses on reducing devices' standby power. Savings are typically assumed to accrue in both active and standby mode, since standby functions like remote control and memory are powered whether the device is on or off. The power savings are only a few watts per unit, but the number of units is large. There are approximately 260 million TVs (NRDC 2005), 120 million VCRs, and 10 million TV/VCR combination units in U.S. homes (Rosen and Meier 1999). In addition, 41 percent of US homes had a DVD player as of 2003 (*Appliance* 2004). We estimate that some 54 million audio devices are sold each year, including amplifiers, receivers, tuners, CD players, cassette players, equalizers, radios, mini-systems, rack systems and laserdiscs. Car audio and portable audio products are not included in this total, since they are not covered under the program. At the present time, CD

[7] Set-top boxes are devices intended for use with a TV, including satellite receivers, cable boxes, digital converters, internet devices, videogames, videophones, digital (hard-drive) video recorders, and combination devices.

players and mini-systems make up the vast majority of ENERGY STAR audio savings. We currently include only these three products in our reported savings; others may be added as ENERGY STAR participation increases among other types of audio products.

The biggest difficulty in forecasting TV and VCR power consumption was obtaining unit power consumption data. When EPA began to develop the program, the most recent data available on television energy use were over ten years old, and virtually no data were available for VCRs or audio equipment. New metered data collected by researchers at LBNL and the Florida Solar Energy Center provided the basis for developing the product label (Floyd & Webber 1998). Once the TV/VCR agreement was in place these values were updated using shipment-weighted power consumption values provided by industry representatives (Isaacs 1998). Our TV and VCR shipment forecasts were developed using historic shipment data from *Appliance* (1995).

An Energy Star label for telephony products was launched in January of 2002.

Residential Lighting. The ENERGY STAR program promotes energy-efficient residential lighting fixtures and compact fluorescent lamps (CFLs). ENERGY STAR fixtures include fixtures designed to take only pin-based CFLs, electronically-ballasted tube fluorescent fixtures, and outdoor fixtures that incorporate motion sensors and photocells.

We analyze the residential lighting fixture market in three segments: torchieres, other indoor fixtures, and outdoor fixtures. Torchieres were split out because the market is dominated by high-wattage halogen fixtures using 300 to 500 watts. ENERGY STAR CFL replacements for these fixtures have proven to be a great success, and market penetrations for these products are higher than for other ENERGY STAR fixtures. Torchiere energy savings are calculated using data from Calwell (1999) and Calwell and Granda (1999). Shipment data for other indoor fixtures and outdoor fixtures were from the U.S. Department of Commerce (1997).

Even though prices of CFLs have fallen significantly in recent years, they are still not cost-effective in low-use fixtures. However, we recognize that some CFLs do end up in low-use applications (for example, if the consumer needs a long-life lamp for a hard-to-reach socket). We therefore split indoor fixtures into three usage bins (less than one hour per day, one to three hours per day, and more than three hours per day) for this analysis. We assume a high market penetration among high-use fixtures, since CFLs are generally cost effective at that level of use, but lower penetrations for medium- and low-use fixtures. Unit energy consumption for high-use indoor fixtures was taken from the Baseline Residential Lighting Energy Use Study (described in Vorsatz et al 1997). For the 100 percent penetration scenario, we assumed that 100 percent of high-use fixtures were replaced, 50 percent of medium-use fixtures and 10 percent of low-use fixtures.

Our analysis of outdoor fixtures focused on motion sensor- and photocell-equipped fixtures. Baseline energy consumption was again taken from the Baseline Residential Lighting Energy Use Study. As with indoor fixtures, we focused on high-use fixtures, although for different reasons. Outdoor fixtures, especially around entryways, are often left on all night for security. Motion sensor fixtures are particularly suited for this type of application. A motion sensor was assumed to reduce usage to one hour per day.

In addition to dedicated CFL fixtures, compact fluorescent lamps themselves are covered by an ENERGY STAR specification. Like indoor fixtures, CFLs were analyzed by usage bin. The analysis was complicated by the fact that CFLs have a significantly longer lifetime (10,000 hours) than incandescent lamps (usually estimated at 750 to 1,500 hours, we use 1,500 hours for this analysis). Because a CFL lasts longer, one CFL replaces one current plus several future incandescent lamp purchases. The larger the market share of CFLs, the fewer total lamps will be sold (because they need to be replaced less often). This problem required a more elaborate stock accounting than had been done for the other products.

Commercial Lighting. Commercial lighting products covered by ENERGY STAR labels include exit signs and traffic signals. Both of these products have ample opportunity for efficiency improvements, particularly through the use of LEDs. The advantages of LEDs go beyond energy efficiency. Since LEDs last many times longer than incandescent lamps, maintenance costs can be sharply reduced.

Although exit signs may seem like a small niche in the commercial lighting market, they were an ideal target for an ENERGY STAR program. Exit signs must be lit 24 hours a day. Most signs used incandescent lamps for illumination, which consumed about 40 watts. ENERGY STAR exit signs must consume less than five watts. Because of the importance of visibility during emergencies, the program also includes visibility and luminance requirements.

Calculating energy savings for exit signs was fairly straightforward. However, there is some uncertainty associated with the size of the stock, shipments and lifetime. The lifetime for some light sources (LED and electroluminescent) are reported to be 20 years or more, but because efficacy may degrade over time we use a more conservative ten-year lifetime.

Because retrofits are the primary driver of LED traffic signal sales, we based our analysis for these products on stock replacement rather than estimating the ENERGY STAR share of units shipped, as we did with other products. Red and green traffic signals were modeled separately because of differences in cost effectiveness. Green signals have shorter duty cycles and green LEDs are more expensive than red LEDs, making it less cost effective to replace a green incandescent signal with an LED signal. Yellow (amber) signals are not analyzed because of their very short duty cycles, although LED signals do have a small share of the yellow signal market.

Residential Appliances. ENERGY STAR appliances for the home include refrigerators, freezers, clothes washers, dishwashers, room air conditioners (RACs), dehumidifiers, ceiling fans and exhaust fans.

After HVAC and water heating, large appliances constitute the largest energy end-uses in a typical home. Like some of the HVAC products, refrigerators, freezers, clothes washers, dishwashers, and room air conditioners (RACs) are already subject to federal minimum efficiency standards. The ENERGY STAR program is intended to expand the market for products that significantly exceed the minimum standard. To earn an ENERGY STAR label, refrigerators and freezers must be 10 percent more efficient than standards, dishwashers must be 25 percent more efficient and RACs must be 10 percent more efficient than standards. The clothes washer specification is set so that the devices must

be horizontal axis or equivalent efficiency to qualify. The minimum efficiency standard for clothes washers was tightened in 2004 and will be again in 2007.

To obtain energy use for these ENERGY STAR devices, we first calculated unit energy consumption for units just meeting the federal minimum efficiency standards. The average energy consumptions for refrigerators and RACs (under both existing and new efficiency standards) were weighted according to the distribution of products by product class and capacity (Wenzel et al. 1997, US DOE 1995b, US DOE 1997a). In the case of dishwashers and clothes washers a prototypical model was used to calculate energy consumption. Where ENERGY STAR criteria were specified in terms of percent efficiency improvement over standards, the appropriate percentages were then applied to obtain ENERGY STAR energy consumption.

A large share of the energy consumption by clothes washers and dishwashers is due to the use of household hot water, which may be heated using gas, oil, LPG or electricity. (Because oil and LPG water heaters represent only a small fraction of water heaters, they were treated together with gas water heaters for this analysis). The test procedures for these products include both the electricity used by the device itself (motor, controls, etc.) and energy (fuel or electric) used for water heating. The test procedure for clothes washers also includes dryer energy, since remaining moisture content in the load at the end of a wash cycle varies by washer and affects the amount of energy required to dry the load.[8] Dryers may also be gas or electric. We therefore analyzed dishwasher energy savings in three parts: machine energy, which accrued to all devices, electric water heating energy, which accrued to devices installed in electric water heating homes, and gas water heating energy, which accrued to devices installed in gas water heating homes (oil and LPG water heating homes were also included here). Similarly, clothes washer savings are analyzed in five parts: machine, electric water heating, gas water heating, electric drying and gas drying. The shares of water heating by fuel type were taken from US DOE (1999). Unit energy consumption and savings for clothes washers and dishwashers included machine energy and weighted-average water heating energy for all fuels, expressed as primary energy.

Dehumidifiers are not covered by appliance standards. For these, the ENERGY STAR requirement was specified in terms of kWh of energy used per liter of water removed from the air. Baseline efficiencies were obtained from Cadmus (1999).

Ceiling fans and exhaust fans arguably could have been grouped with HVAC equipment. However, because these products are not covered by minimum efficiency standards, they are instead included with appliances. Ceiling fan UEC data was taken from Calwell and Horowitz (2001). Information on exhaust fan usage was unavailable; usage was simply assumed to be one hour per day for the types of fans covered by the program (rangehood fans and bathroom and utility room exhaust fans). Exhaust fan power levels were obtained from product literature from manufacturers.

Commercial Appliances. Since 2000, Energy Star has expanded significantly into commercial appliances. In 2003, bottled water coolers and commercial refrigerators and freezers were joined by

[8] The Department of Energy changed the test procedure for clothes washers several years ago. Through 2003 the standard was based on energy factors which measure energy per wash cycle for machine and water heating energy. The 2004 and 2007 standards are based on modified energy factors (MEF), which include dryer energy. The current ENERGY STAR specification is expressed in terms of MEF.

hot food holding cabinets, gas and electric steamers, and gas and electric fryers as Energy Star labeled products. Cold beverage vending machines were added in 2004.

The program covers cold-only and hot/cold bottled water coolers. Efficiencies are specified in terms of kWh per day. Baseline efficiencies were obtained from Cadmus (2000).

Data for commercial refrigerators and freezers was taken from A. D. Little (1996) and Cadmus (2001). Only solid door refrigerators and freezers are covered. The program covers refrigerator/freezers and ice cream freezers under separate specifications, but due to insufficient data, these product classes are not modeled separately. Efficiencies are again expressed as kWh per day.

The specifications for fryers and steamers include a cooking efficiency (the quantity of energy input into the food expressed as a percent of the energy input to the appliance) and an idle rate, expressed in Btu/hr (gas appliances) or watts (electric). Hot food holding cabinets have only an idle energy rate requirement, expressed in watts per cubic foot. Data for commercial cooking equipment was obtained from the Food Service Technology Center (Fisher 2003).

Recent Changes to the Model

The results of this model have been presented in four earlier reports (Webber et al. 1999, Webber et al. 2002, Webber et al. 2003, Webber et al. 2004). Several important changes have been made to the program and the model between the 2003 status report and this one, which we will highlight here. Some of these items have been mentioned elsewhere, and are repeated here for ease of reference.

Several products were added to the analysis since the previous update (Webber et al. 2005). Commercial cooking equipment (hot food holding cabinets, fryers and steamers) and vending machines are new additions to this year's analysis. The monitor specification was revised to include an active power requirement. This had a significant impact both on the methodology used and on the results of the forecast.

As discussed above, office equipment enabling rates and turn-off rates were revised based on the results of a series of after-hours audits of commercial buildings (Roberson et al. 2004). Power levels for multifunction devices were revised based on power levels for qualifying products provided to EPA by manufacturers. Ceiling fan unit energy consumption was revised based on the 2001 RECS (US DOE 2004).

New sales data were incorporated into the forecast for consumer electronics (CEA Market Research, 2004), appliances (AHAM 2003), and ceiling fans (Appliance 2003). Shipments of LCD and CRT monitors were revised to reflect the rapidly changing mix of those technologies in the market (IDC 2003).

While Energy Star Homes are not covered by this report, the effects of that program are taken into account when estimating savings for Energy Star HVAC equipment. Since Energy Star HVAC equipment is often part of an Energy Star home and counted toward its savings. Sales of Energy Star HVAC that are attributed to the Homes program are not included in this report (which is concerned

specifically with sales due to Energy Star's product labeling program). This year, updated Energy Star home sales led to changes in the savings forecast for HVAC equipment.

EPA received data from manufacturers on the number of Energy Star units shipped for ceiling fans, commercial refrigerators and freezers, dehumidifiers, exit signs, gas and oil-fired boilers, geothermal heat pumps, residential lighting fixtures, roof products, set-top boxes (digital cable, digital converters, and satellite receivers), televisions, VCRs, TV/VCR/DVD combination units, traffic signals ventilation fans, and water coolers. This data were the results of the second year of an ongoing process in which EPA will receive this information for all the covered products on a regular basis. These data were used to revise estimates of market penetrations for these products.

Table 4. Annual and Lifetime Savings per Unit for ENERGY STAR® Devices Sold in 2003

Equipment Type	% Annual Energy Savings[a]	Annual Unit Primary Energy Savings[b] MBtu/yr	Annual Bill Savings due to ENERGY STAR[c] 2000$/unit	Product Lifetime[d] years	Lifetime Primary Energy Savings[e] million Btu	Lifetime Energy Bill Savings, Undiscounted[c] 2000$/unit
Office Equipment						
-Office PC[f]	69%	2.7	$18	4	11	$71
-Office CRT Monitor[f]	83%	4.3	$28	4	17	$110
-Office LCD Monitor[f]	79%	2.0	$13	4	7.8	$51
-Home PC[f]	38%	0.60	$4.4	8	4.7	$34
-Home CRT Monitor[f]	48%	0.91	$6.6	8	7.2	$52
-Home LCD Monitor[f]	40%	0.36	$2.6	8	2.8	$21
-Fax	40%	1.4	$9.1	4	5.5	$36
-Copier	42%	3.6	$24	6	21	$140
-Multifunction Device	16%	4.9	$33	6	29	$190
-Scanner	49%	0.81	$5.4	4	3.2	$21
-Printer	28%	2.1	$15	5	10	$72
Consumer Electronics						
-TV	24%	0.39	$2.8	11	4.1	$25
-VCR	29%	0.18	$1.3	11	1.9	$8.9
-TV/VCR/DVD	65%	0.53	$3.8	11	5.6	$26
-DVD Player	59%	0.34	$2.4	7	2.3	$17
-Audio Equipment	77%	0.74	$5.3	7	5.1	$47
-Telephony	24%	0.11	$0.83	7	0.79	$5.7
-Set-top Box	8%	0.16	$1.1	7	1.1	$8.0
Residential Heating and Cooling						
-Furnace (Gas or Oil)	15%	13	$87	18	230	$1,600
-Central Air Conditioner	24%	8.3	$60	14	110	$830
-Air-Source Heat Pump	18%	25	$130	12	290	$1,500
-Geothermal Heat Pump	30%	56	$400	15	800	$6,000
-Boiler (Gas or Oil)	5.9%	6.1	$40	20	120	$830
-Programmable Thermostat	20%	22	$150	15	320	$2,300
Lighting						
-Fixture	77%	0.79	$5.7	20	15	$110
-CFL	67%	0.93	$6.7	(i)	5.6	$38
-Exit Sign	42%	0.35	$2.3	10	3.4	$22
-Traffic Signal	90%	5.5	$36	10	53	$350
Residential Appliances						
-Room Air Conditioner	10%	0.67	$4.9	13	8.5	$63
-Dehumidifier	10%	1.2	$9.0	12	14	$110
-Exhaust Fan	64%	0.58	$4.2	10	5.6	$41
-Ceiling Fan	51%	1.6	$12	10	16	$100
-Dishwasher[g]	25%	1.1	$7.5	13	14	$97
-Refrigerator	10%	0.56	$4.1	19	10	$76
-Freezer	10%	0.44	$3.2	19	8.0	$60
-Clothes Washer[g,h]	38%	4.0	$28	14	56	$400
Commercial Appliances						
-Water Cooler	45%	2.5	$17	10	25	$180
-Commercial Refrigeration	43%	20	$130	10	200	$1,300
-Hot Food Holding Cabinet	59%	44	$290	15	630	$4,200
-Fryer	21%	25	$160	10	250	$1,700
-Steamer	58%	85	$560	10	850	$5,500
-Vending Machine	NA	NA	NA	14	NA	NA
Other						
- Utility Transformer	5%	0.58	$3.8	20	11	$74
- C&I Transformer	26%	10	$69	35	340	$2,400
- Residential Roofing (per 1000 sq ft)	n/a	0.99	$7.4	20	18	$180
- Commercial Roofing (per 1000 sq ft)	n/a	2.0	$13	7	14	$110

Notes to Table 4:

a) Annual savings are relative to standard new unit, with the following qualifications: Geothermal heat pump is compared to air-source heat pump and electric water heater. Residential lighting fixtures are compared to a standard incandescent fixture. For HVAC, the standard energy bills are derived from 1990 RECS consumption data. All savings are for specifications that apply in 2003. (Continued on next page.)

Results

Table 4 shows annual unit energy and energy bill savings, average product lifetime, and lifetime energy and energy bill savings for each product. These estimates form the basis of the calculation of savings to date and the forecasts of future savings. ENERGY STAR commercial steam cookers have the highest absolute per unit savings, followed by geothermal heat pumps, hot food holding cabinets, fryers, and air source heat pumps. Ranked by percentage savings, however, traffic signals take the lead at 90 percent savings. Other products with at least 50 percent savings are office CRT and LCD monitors, residential lighting fixtures, CFLs, office PCs, exhaust fans, ceiling fans, audio equipment, TV/VCR/DVD combination units, DVD players, commercial steamers and commercial fryers.

Tables 5 and 6 show annual energy, dollar, and carbon savings for 2003 and 2004, respectively. Also shown is the peak demand reduction due to the program. The addition of new products combined with increased market penetration for existing products is increasing annual savings at a rapid rate. Annual savings in 2003 were 720 trillion Btu and $4.9 billion, an increase of 18 over 2002 energy savings. By 2004, energy savings are expected to reach 810 trillion Btu and $5.6 billion. The peak demand reduction due to the ENERGY STAR labeling program was 7.3 gigawatts in 2003 and is expected to increase to 8.1 gigawatts in 2004.

Notes to Table 4 (continued):

b) Electricity is converted to primary energy using a conversion factor of 10,703 Btu/kWh (US DOE 2000).

c) Yearly U.S. average energy prices are given in Table 2. Lifetime energy bill savings are calculated using the stream of future energy prices.

d) Lifetimes are the average lifetime for each product. Computer, monitor, copier, printer and fax lifetimes are from Koomey et al. (1995) (the short lifetimes for computers reflects rapid obsolescence for those products); scanner lifetimes are assumed to be the same as those of fax machines; TV, VCR, DVD, and audio product lifetimes are from *Appliance* (1996); telephony and dehumidifier lifetimes are from *Appliance* (1998); settop box lifetimes are assumed to be similar to other electronics products; gas furnace, central air conditioner, air-source heat pump and boiler lifetimes are from Lewis and Clarke (1990); geothermal heat pump lifetime is an LBNL estimate; thermostat lifetime is the weighted average of HVAC lifetimes; lifetimes for residential lighting fixtures are based on a ballast life of 40,000 hours and 2,000 hours of use per year; traffic signal life is from Suozzo and Nadel (1998); exit sign life is from National Lighting Product Information (1994); clothes washer, dishwasher, refrigerator, and room air conditioner lifetimes are from Wenzel et al (1997); commercial refrigeration lifetimes are from A.D. Little (1996); water coolers lifetimes are assumed to be the same as commercial refrigeration; exhaust fans and ceiling fan lifetimes are taken from Cadmus (1999); hot food holding cabinet life is from Zabrowski (2003); steamer, fryer and vending machine lifetimes are from ICF (2002a, b, and c, respectively); commercial and industrial transformer life is from Thomas et al. (2002).

e) Lifetime energy savings may not equal the product of annual energy savings and product lifetime due to rounding.

f) Usage assumptions for home computers and monitors differ from office computers and monitors, resulting in different unit savings.

g) Dishwashers energy savings include machine energy and water heating energy. Clothes washer savings include machine, water heating and dryer energy. Water heating and dryer energy are a weighted average of gas and electric equipment energy.

h) The savings for clothes washers given here are lower than the percent savings over efficiency standards specified by the ENERGY STAR program (50 percent) because here we are comparing to standard new units, which are more efficient than the minimum standard. Clothes washer savings are from US DOE (1998a).

i) CFL lifetime is assumed to be 10,000 hours.

Table 5. Annual Savings in 2003

Program	Equipment Type	Primary Savings[b] (trillion Btu)	Energy Bill Savings Undiscounted[c] (millions of 2000$)	Carbon Emissions Avoided[d] (MtC)	Conser-vation Load Factor[e]	Peak Load Savings (GW)
Office Equipment	- Computers and Monitors	250	$ 1,700	4.8	1.2	2.0
	- Faxes	12	$ 78	0.22	1.0	0.12
	- Copiers	11	$ 75	0.22	5.2	0.026
	- Multifunction Devices	26	$ 170	0.50	0.92	0.30
	- Scanners	17	$ 110	0.33	0.32	0.58
	- Printers	110	$ 740	2.1	7.3	0.37
	Subtotal	430	$ 2,900	8.2	1.3	3.4
Consumer Electronics	- TVs	22	$ 160	0.41	1.0	0.23
	- VCRs	15	$ 110	0.28	1.0	0.16
	- TV/VCR/DVDs	9.4	$ 68	0.18	1.0	0.10
	- DVD Players	8.5	$ 61	0.16	1.0	0.090
	- Audio Equipment	8.8	$ 64	0.17	1.0	0.094
	- Telephony	0.95	$ 6.9	0.018	1.0	0.010
	- Set-top Boxes	0.0049	$ 0.035	0.000093	1.1	0.000050
	Subtotal	64	$ 470	1.2	1.0	0.69
Residential Heating & Cooling	- Furnaces (Gas or Oil)	6.5	$ 44	0.10	-	-
	- Central Air Conditioners	4.1	$ 30	0.078	0.15	0.29
	- Air-Source Heat Pumps	2.3	$ 16	0.043	0.15	0.060
	- Geothermal Heat Pumps	0.19	$ 1.4	0.0037	0.15	0.0016
	- Boilers (Gas or Oil)	2.1	$ 15	0.035	-	-
	- Programmable Thermostats	37	$ 260	0.63	0.15	0.55
	- Unitary HVAC	0.51	$ 3.4	0.0097	0.15	0.036
	Subtotal	53	$ 370	0.90	0.17	0.94
Res and Com Lighting	- Fixtures	55.0	$ 400	1.0	1.0	0.57
	- CFLs	55.0	$ 400	1.1	1.0	0.58
	- Exit Signs	4	$ 26	0.076	1.0	0.043
	- Traffic Signals	5.9	$ 39	0.11	1.0	0.063
	Subtotal	120	$ 870	2.3	1.0	1.3
Residential Appliances	- Room Air Conditioners	6.9	$ 50	0.13	0.15	0.49
	- Dehumidifiers	1.0	$ 7.6	0.020	0.40	0.028
	- Exhaust Fans	0.16	$ 1.2	0.0030	1.0	0.0017
	- Ceiling Fans	0.0	$ 0	0.0	1.0	0.0
	- Dishwashers	8.2	$ 58	0.14	0.77	0.081
	- Refrigerators	9.4	$ 68	0.18	0.95	0.110
	- Freezers	0.056	$ 0.40	0.0011	0.95	0.00062
	- Clothes Washers	20	$ 140	0.35	0.66	0.22
	Subtotal	46	$ 320	0.83	0.43	0.93
Commercial Appliances	-Water Coolers	2.2	$ 14	0.041	0.70	0.035
	-Commercial Refrigeration	1.1	$ 7.5	0.022	0.95	0.013
	-Hot Food Holding Cabinets	0.0	$ 0.0	0.0	0.95	0.00
	-Fryers	0.031	$ 0.20	0.00045	0.95	0.000026
	-Steamers	0.023	$ 0.15	0.00039	0.95	0.00016
	-Vending Machines	0.0	$ 0.0	0.0	0.00	0.0
	Subtotal	3.4	$ 22	0.064	0.74	0.048
Other	- Utility Transformers	0.10	$ 0.69	0.0020	1.0	0.0011
	- C&I Transformers	0.17	$ 1.1	0.0032	0.77	0.0023
	- Residential Roofing	0.034	$ 0.25	0.00071	0.15	0.0046
	- Commercial Roofing	0.0	$ 0.0	0.0	0.15	0.00
	Subtotal	0.31	$ 2.1	0.059	0.45	0.0080
TOTAL		720	$4,900	13	0.94	7.3

Notes to Table 5:

a) Columns may not total due to rounding.

b) Electricity is converted to primary energy using a conversion factor of 10,589 Btu/kWh (US DOE 2000).

c) Energy bills are calculated using yearly U.S. average energy prices. See Table 2.

d) Carbon emissions for electricity are from Cadmus (1998). See Table 2.

e) CLFs for clothes washers and dishwashers are derived from PG&E and SCE summer load shape from Ruderman et al.

(Continued next page.)

We provide savings forecasts for two cases: a target market penetration case, using EPA's and DOE's market penetration goals for ENERGY STAR devices, and a 100 percent market penetration case, assuming that all shipments are ENERGY STAR-compliant (but not necessarily enabled, see below) from 2004 onward.

Target Market Penetration Case. This case represents the best estimate of the long-term aggregate savings achievable by ENERGY STAR programs given the market penetration goals and unit energy savings estimates of the individual programs. The target market penetration case uses unit savings estimates and year-by-year penetration targets with the best available estimates of inputs such as energy prices and carbon emission factors. The target market penetrations are based, in part, on the price premium for ENERGY STAR units. Because ENERGY STAR computers are no more expensive than non-ENERGY STAR devices, they are expected to represent a large share of the market (90 percent or more) by 2010. In contrast, high efficiency heating and cooling equipment is significantly more expensive than standard equipment.

Table 7 and Table 8 show the cumulative savings under target market penetrations for the periods 2004-2010 and 2004-2020, respectively. All the products together are expected to save 7.5 quadrillion Btu (quads) by 2010, growing to 24 quads by 2020. Through 2010, computers (CPUs and monitors) account for the largest share of savings, primarily due to the large market share of ENERGY STAR devices and steep growth in the number of units in place. Printers have the second highest savings, while residential lighting fixtures and CFLs are neck and neck for the third highest savings. By 2020, the same four products take the top four slots, with computers followed by residential lighting fixtures, printers, and CFLs. Although residential fixtures and CFLs have only a moderate penetration, the number of units shipped each year is large, resulting in a large number of ENERGY STAR units in place, each with a high unit savings.

100 Percent Market Penetration. Our 100 percent market penetration scenario shows the savings that could be achieved if everyone bought ENERGY STAR equipment instead of standard equipment from 2001 to 2010. Because geothermal heat pumps are a new technology without a defined baseline market share, they are modeled as replacing a share of the markets for more traditional technologies. Geothermal heat pumps are assumed to displace half of non-ENERGY STAR air-source heat pumps. The 100 percent penetration forecast for air-source heat pumps takes into account this loss of market to geothermal heat pumps. As noted above, among residential lighting fixtures only high-use fixtures are assumed to achieve 100 percent market penetration in this scenario. Medium- and low-use

---

Notes to Table 5 (continued):
(1989, Table D-1 to D-5 and D-7 to D-11, p. D-1 to D-12). Dehumidifier CLF take from usage patterns from AD Little (1998). Water cooler CLF derived from metered load data from Rovi (2001). CLFs for cooling technologies and refrigeration equipment are taken from Koomey et al. (1990). Roofs are assumed to have the same CLF as cooling technologies. Commercial cooking equipment is assumed to have the same CLF as commercial refrigeration. Residential lighting CLFs are based on load profiles taken from an October 1979 report by the CEC. CLFs for exit signs and traffic signals equal one because they operate 24 hours a day. CLFs for consumer electronics equal one because savings are assumed to accrue whether the device is on or off. Office equipment CLFs are derived from assumed operating patterns (Piette et al. 1995, Nordman et al. 1998, and recent printer and scanner metered data). Ceiling fans are assumed to have the same CLF as residential lighting. Exhaust fans encompass several products. The CLF represents a weighted average of intermittent fans (assumed the same as lighting), continuously operated fans (CLF of 1), and rangehood fans (assumed the same as cooking equipment, Ruderman et al., 1989).

Table 6. Expected Annual Savings in 2004

Program	Equipment Type	Primary Savings[b] (trillion Btu)	Energy Bill Savings Undiscounted[c] (millions of 1998$)	Carbon Emissions Avoided[d] (MtC)	Peak Load Savings (GW)[e]
Office Equipment	- Computers and Monitors	250	$ 1,700	4.8	1.73
	- Faxes	10	$ 69	0.20	0.11
	- Copiers	7.9	$ 53	0.15	0.019
	- Multifunction Devices	30	$ 200	0.57	0.34
	- Scanners	19	$ 120	0.36	0.63
	- Printers	140	$ 940	2.7	0.44
	Subtotal	460	$ 3,100	8.7	3.2
Consumer Electronics	- TVs	27	$ 190	0.51	0.29
	- VCRs	15	$ 110	0.29	0.17
	- TV/VCR/DVDs	11	$ 82	0.22	0.12
	- DVD Players	13	$ 97	0.25	0.14
	- Audio Equipment	11	$ 82	0.22	0.12
	- Telephony	2.0	$ 14	0.037	0.02
	- Set-top Boxes[f]	0.057	$ 0.41	0.0011	0.001
	Subtotal	80	$ 580	1.5	0.86
Residential Heating & Cooling	- Furnaces (Gas or Oil)	8.5	$ 59	0.13	-
	- Central Air Conditioners	4.8	$ 35	0.091	0.34
	- Air-Source Heat Pumps	2.4	$ 17	0.045	0.063
	- Geothermal Heat Pumps	0.25	$ 1.8	0.0048	0.002
	- Boilers (Gas or Oil)	2.6	$ 19	0.044	-
	- Programmable Thermostats	42	$ 300	0.71	0.62
	- Unitary HVAC	1.0	$ 6.7	0.019	0.073
	Subtotal	61	$ 430	1.0	1.1
Res and Com Lighting	- Fixtures	69	$ 530	1.3	0.72
	- CFLs	75	$ 540	1.4	0.78
	- Exit Signs	4.9	$ 33	0.095	0.053
	- Traffic Signals[f]	7.5	$ 50	0.14	0.080
	Subtotal	160	$ 1,100	3.0	1.6
Residential Appliances	- Room Air Conditioners	8.6	$ 62	0.16	0.61
	- Dehumidifiers[f]	1.7	$ 12	0.032	0.046
	- Exhaust Fans	0.31	$ 2.2	0.0059	0.0034
	- Ceiling Fans	0.14	$ 1.0	0.0027	0.0015
	- Dishwashers	11	$ 77	0.19	0.11
	- Refrigerators	10	$ 74	0.20	0.12
	- Freezers	0.23	$ 1.6	0.0043	0.0025
	- Clothes washers	20	$ 140	0.35	0.22
	Subtotal	52	$ 370	0.94	1.1
Commercial Appliances	[illegible]	3.6	$ 24	0.069	0.058
	- Commercial Refrigeration	1.6	$ 10	0.030	0.018
	-Hot Food Holding Cabinets	0.045	$ 0.30	0.00086	0.00051
	-Fryers	0.16	$ 1.1	0.0024	0.00011
	-Steamers	0.12	$ 0.81	0.0021	0.00084
	- Vending Machines	1.0	$ 6.9	0.020	0.010
	Subtotal	6.5	$ 44	0.12	0.087
Other	- Utility Transformers	0.13	$ 0.86	0.0025	0.0014
	- C&ITransformers	0.18	$ 1.2	0.0034	0.0025
	- Residential Roofing	0.046	$ 0.34	0.00097	0.0062
	- Commercial Roofing	0.15	$ 0.99	0.0030	0.016
	Subtotal	0.50	$ 3.4	0.0099	0.026
TOTAL		[illegible]	$5,600	15	8.1

Notes to Table 6:

a) Columns may not total due to rounding.

b) Electricity is converted to primary energy using a conversion factor of 10,703 Btu/kWh (US DOE 2001).

c) Energy bills are calculated using yearly U.S. average energy prices. See Table 2.

d) Carbon emissions for electricity are from Cadmus (1998). See Table 2.

e) Peak load savings are calculated using the CLFs shown in Table 5.

fixtures are assumed to have maximum market penetrations of 50 percent and 10 percent, respectively. Similarly, for CFLs we assume a maximum penetration of 50 percent for medium-use fixtures and 25 percent for low-use applications.

The 100 percent market penetration scenario should not be interpreted as a technical potential, because although we assume that all units sold are ENERGY STAR, we do not assume that all units sold are properly enabled. Studies have noted less than 100 percent enabling rates of ENERGY STAR features in office equipment, particularly copiers, computers and monitors (see Table 3).

The cumulative savings for the 100 percent market penetration scenario are shown in Tables 9 and 10. Together the programs could save 23 quads from 2004 to 2010, growing to 76 quads by 2020. These correspond to a total energy bill savings of $120 billion through 2010 and $340 billion through 2020 (present value, discounted at a 4 percent real discount rate). These totals are about three times the savings in the target market penetration case. By far the largest savings in the 100 percent market penetration case is due to CFLs, followed by residential lighting fixtures and computers.

Figure 2 compares annual carbon savings under the 100 percent market share scenario and the target market penetration scenario through 2020.

Table 7. Cumulative Savings 2004-2010, Target Market Penetrations

		Target Market Penetration Case			
		Primary Energy Savings[c]	Energy Bill Savings[d,e] (millions of 2000 dollars)		Carbon Avoided[f]
Program	Equipment Type	(trillion Btu)	Undiscounted	Discounted	(MtC)
Office Equipment	- Computers and Monitors	1,800	$12,000	$9,300	33
	- Faxes	49	$320	$250	0.89
	- Copiers	17	$110	$95	0.33
	- Multifunction Devices	190	$1,200	$940	3.4
	- Scanners	160	$1,100	$800	2.9
	- Printers	1,300	$9,500	$7,100	24
	Subtotal	3,500	$24,000	$18,000	64
Consumer Electronics	- TVs	260	$1,900	$1,400	4.7
	-VCRs	57	$410	$330	1.1
	-TV/VCR/DVDs	99	$720	$550	1.8
	-DVD Players	200	$1,400	$1,100	3.5
	-Audio Equipment	130	$920	$690	2.2
	-Telephony	60	$440	$320	1.0
	-Set-top Boxes	3.5	$26	$15	0.061
	Subtotal	800	$5,900	$4,400	14
Residential Heating & Cooling	- Furnaces (Gas or Oil)	110	$740	$550	1.6
	- Central Air Conditioners	37	$270	$200	0.00066
	- Air-Source Heat Pumps	14	$98	$77	0.25
	- Geothermal Heat Pumps (4)	3.5	$26	$19	0.061
	- Boilers (Gas or Oil)	32	$230	$170	0.54
	- Programmable Thermostats	390	$2,700	$2,100	6.3
	- Unitary HVAC	25	$160	$120	0.44
	Subtotal	600	$4,300	$3,200	9.2
Res and Comm. Lighting Lighting	- Residential Lighting Fixtures	830	$6,100	$4,500	15
	- CFLs	880	$6,500	$4,800	16
	- Exit Signs	48	$320	$240	0.86
	- Traffic Signals	75	$490	$370	1.3
	Subtotal	1,800	$13,000	$10,000	32
Residential Appliances	- Room Air Conditioners	100	$770	$570	1.8
	- Dehumidifiers	27	$190	$140	0.47
	- Exhaust Fans	6.9	$51	$37	0.12
	- Ceiling Fans	12	$88	$63	0.21
	- Dishwashers	140	$1,000	$770	2.4
	- Refrigerators	98	$720	$540	1.7
	- Freezers	7.2	$53	$39	0.13
	- Clothes Washers	140	$1,000	$770	2.4
	Subtotal	540	$3,900	$2,900	9.3
Commercial Appliances	[illegible]	61	$400	$290	1.1
	- Commercial Refrigeration	23	$150	$110	0.41
	-Hot Food Holding Cabinets	4.0	$26	$19	0.069
	-Fryers	10	$69	$49	0.15
	-Steamers	7.2	$48	$35	0.12
	- Vending Machines	31	$200	$140	0.54
	Subtotal	140	$900	$650	2.4
Other	- Utility Transformers	1.1	$7.0	$5.3	0.019
	- C&I Transformers	1.3	$8.7	$6.6	0.024
	- Residential Roofing	1.8	$14	$9.7	0.033
	- Commercial Roofing	13	$83	$59	0.23
	Subtotal	17	$110	$81	0.30
TOTAL		7,500	$53,000	$40,000	13

See notes after Table 10.

Table 8. Cumulative Savings 2004-2020, Target Market Penetrations

		Target Market Penetration Case			
		Primary Energy Savings[c]	Energy Bill Savings[d,e] (millions of 2000 dollars)		Carbon Avoided[f]
Program	Equipment Type	(trillion Btu)	Undiscounted	Discounted	(MtC)
Office Equipment	- Computers and Monitors s	5,000	$35,000	$22,000	79
	- Faxes	89	$600	$400	1.5
	- Copiers	18	$120	$98	0.34
	- Multifunction Devices	430	$2,900	$1,900	6.9
	- Scanners	450	$3,100	$1,900	7.1
	- Printers	3,700	$30,000	$18,000	58
	Subtotal	9,700	$71,000	$44,000	150
Consumer Electronics	- TVs	730	$5,500	$3,400	11
	-VCRs	57	$420	$330	1.1
	-TV/VCR/DVDs	270	$2,000	$1,300	4.2
	-DVD Players	630	$4,800	$2,900	9.7
	-Audio Equipment	380	$2,800	$1,700	5.8
	-Telephony	420	$3,200	$1,800	6.1
	-Set-top Boxes	27	$210	$94	0.40
	Subtotal	2,500	$19,000	$11,000	39
Residential Heating & Cooling	- Furnaces (Gas or Oil)	510	$3,600	$2,100	7.4
	- Central Air Conditioners	59	$440	$300	0.00099
	- Air-Source Heat Pumps	15	$110	$85	0.28
	- Geothermal Heat Pumps (4)	19	$140	$81	0.28
	- Boilers (Gas or Oil)	130	$1,000	$590	2.3
	- Programmable Thermostats	1,100	$7,700	$4,800	16
	- Unitary HVAC	180	$1,200	$680	2.6
	Subtotal	2,000	$14,000	$8,600	29
Res and Comm. Lighting	- Residential Lighting Fixtures	3,800	$29,000	$17,000	57
	- CFLs	3,200	$24,000	$14,000	49
	- Exit Signs	110	$760	$490	1.8
	- Traffic Signals	210	$1,400	$890	3.4
	Subtotal	7,300	$55,000	$32,000	110
Residential Appliances	- Room Air Conditioners	410	$3,100	$1,800	6.2
	- Dehumidifiers	120	$880	$510	1.8
	- Exhaust Fans	39	$300	$170	0.59
	- Ceiling Fans	130	$980	$530	1.9
	- Dishwashers	580	$4,300	$2,500	8.7
	- Refrigerators	360	$2,700	$1,600	5.5
	- Freezers	48	$370	$210	0.71
	- Clothes Washers	240	$1,800	$1,200	3.9
	Subtotal	1,900	$14,000	$8,600	29
Commercial Appliances	- Water Coolers	270	$1,800	$1,100	4.0
	- Commercial Refrigeration	110	$740	$430	1.6
	-Hot Food Holding Cabinets	44	$300	$160	0.63
	-Fryers	94	$640	$360	1.4
	-Steamers	65	$440	$250	0.94
	- Vending Machines	180	$1,200	$660	2.6
	Subtotal	760	$5,100	$2,900	11
Other	- Utility Transformers	2.5	$16	$11	0.039
	- C&I Transformers	3.1	$21	$13	0.05
	- Residential Roofing	20	$160	$86	0.29
	- Commercial Roofing	120	$810	$440	1.7
	Subtotal	140	$1,000	$550	2.1
TOTAL		24,000	$180,000	$110,000	370

See notes after Table 10.

Table 9. Cumulative Savings 2004-2010, 100% Market Penetration

		100% Market Penetration Case			
		Primary Savings[c]	Energy Bill Savings[d,e] (millions of 2000 dollars)		Carbon Avoided[f]
Program	Equipment Type	(trillion Btu)	Undiscounted	Discounted	(MtC)
Office Equipment	- Computers and Monitors	2,000	$13,000	$10,000	36
	- Faxes	49	$320	$250	0.89
	- Copiers	18	$120	$95	0.33
	- Multifunction Devices	200	$1,300	$1,000	3.6
	- Scanners	180	$1,200	$910	3.3
	- Printers	1,300	$9,500	$7,100	24
	Subtotal	3,800	$26,000	$20,000	67
Consumer Electronics	- TVs	450	$3,300	$2,500	8
	-VCRs	57	$420	$330	1.1
	-TV/VCR/DVDs	130	$960	$720	2.3
	-DVD Players	270	$2,000	$1,500	4.8
	-Audio Equipment	290	$2,100	$1,600	5.1
	-Telephony	290	$2,100	$1,500	5.0
	-Set-top Boxes	200	$1,500	$870	3.4
	Subtotal	1,700	$12,000	$9,000	30
Residential Heating & Cooling	- Furnaces (Gas or Oil)	940	$6,500	$4,800	14
	- Central Air Conditioners	680	$5000	$3,700	0.012
	- Air-Source Heat Pumps	50	$360	$280	0.90
	- Geothermal Heat Pumps (4)	47	$350	$260	0.83
	- Boilers (Gas or Oil)	53	$380	$280	0.87
	- Programmable Thermostats	1,100	$7,900	$5,900	18
	- Unitary HVAC	710	$4,600	$3,400	12
	Subtotal	3,600	$25,000	$19,000	47
Res and Comm. Lighting	- Residential Lighting Fixtures	2,500	$18,000	$14,000	44
	- CFLs	8,500	$62,000	$48,000	150
Lighting	- Exit Signs	48	$320	$240	0.86
	- Traffic Signals	75	$490	$370	1.3
	Subtotal	11,000	$81,000	$62,000	200
Residential Appliances	- Room Air Conditioners	190	$1,400	$1,000	3.3
	- Dehumidifiers	37	$270	$200	0.65
	- Exhaust Fans	95	$700	$510	1.7
	- Ceiling Fans	740	$5,400	$4,000	13
	- Dishwashers	260	$1,900	$1,400	4.3
	- Refrigerators	310	$2,300	$1,700	5.5
	- Freezers	50	$370	$270	0.88
	- Clothes Washers	500	$3,600	$2,700	8.4
	Subtotal	2,200	$16,000	$12,000	38
Commercial Appliances	- Water Coolers	93	$610	$450	1.6
	- Commercial Refrigeration	150	$1,000	$750	2.7
	-Hot Food Holding Cabinets	25	$160	$120	0.44
	-Fryers	65	$440	$320	0.95
	-Steamers	44	$290	$220	0.71
	- Vending Machines	55	$360	$250	0.97
	Subtotal	440	$2,900	$2,100	7.4
Other	- Utility Transformers	9.6	$63	$47	0.17
	- C&I Transformers	34	$220	$170	0.61
	- Residential Roofing	57	$440	$320	1.1
	- Commercial Roofing	340	$2,200	$1,600	6.3
	Subtotal	440	$3,000	$2,200	8.1
TOTAL		23,000	$170,000	$120,000	400

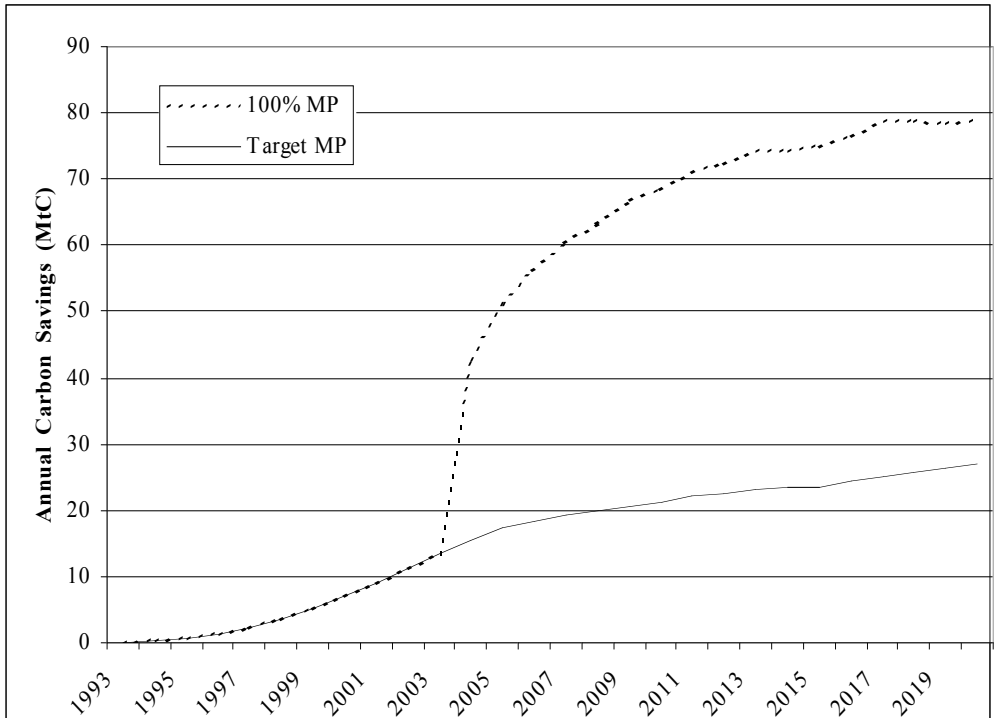
See notes after Table 10.

Table 10. Cumulative Savings 2004-2020, 100% Market Penetration

		100% Market Penetration Case			
		Primary Savings[c]	Energy Bill Savings[d,e] (millions of 2000 dollars)		Carbon Avoided[f]
Program	Equipment Type	(trillion Btu)	Undiscounted	Discounted	(MtC)
Office Equipment	- Computers and Monitors	5,700	$39,000	$24,000	88
	- Faxes	90	$600	$410	1.5
	- Copiers	19	$120	$99	0.35
	- Multifunction Devices	470	$3,200	$2,000	7.5
	- Scanners	510	$3,400	$2,100	8
	- Printers	3,700	$30,000	$18,000	58
	Subtotal	10,000	$76,000	$47,000	160
Consumer Electronics	- TVs	1,500	$12,000	$7,000	24
	-VCRs	58	$420	$340	1.1
	-TV/VCR/DVDs	400	$3,000	$1,800	6.2
	-DVD Players	850	$6,400	$3,900	13
	-Audio Equipment	1,000	$7,600	$4,600	15
	-Telephony	1,200	$9,000	$5,300	18
	-Set-top Boxes	990	$7,500	$3,600	15
	Subtotal	6,000	$46,000	$27,000	93
Residential Heating & Cooling	- Furnaces (Gas or Oil)	5,200	$37,000	$21,000	77
	- Central Air Conditioners	2,200	$17,000	$10,000	0.034
	- Air-Source Heat Pumps	92	$680	$460	1.5
	- Geothermal Heat Pumps (4)	290	$2,200	$1,200	4.3
	- Boilers (Gas or Oil)	250	$1,800	$1,100	4
	- Programmable Thermostats	4,500	$33,000	$19,000	69
	- Unitary HVAC	3,400	$23,000	$13,000	51
	Subtotal	16,000	$110,000	$67,000	210
Res and Comm. Lighting	- Residential Lighting Fixtures	12,000	$95,000	$54,000	190
	- CFLs	18,000	$130,000	$87,000	290
	- Exit Signs	110	$760	$490	1.8
	- Traffic Signals	210.0	$1,400	$890	3.4
	Subtotal	31,000	$230,000	$140,000	480
Residential Appliances	- Room Air Conditioners	850	$6,400	$3,700	13
	- Dehumidifiers	160	$1,200	$710	2.4
	- Exhaust Fans	420	$3,200	$1,900	6.4
	- Ceiling Fans	3,300	$25,000	$15,000	50
	- Dishwashers	1,200	$8,500	$5,000	17
	- Refrigerators	1,500	$11,000	$6,500	22
	- Freezers	280	$2,100	$1,200	4.2
	- Clothes Washers	1,200	$9,100	$5,800	19
	Subtotal	8,900	$67,000	$39,000	130
Commercial Appliances	- Water Coolers	410	$2,800	$1,600	6.3
	- Commercial Refrigeration	670	$4,500	$2,600	10
	-Hot Food Holding Cabinets	130	$860	$490	1.9
	-Fryers	310	$2,100	$1,200	4.4
	-Steamers	190	$1,300	$750	2.8
	- Vending Machines	340	$2,300	$1,300	5.1
	Subtotal	2,000	$14,000	$8,000	31
Other	- Utility Transformers	23	$160	$100	0.4
	- C&I Transformers	84	$570	$360	1.3
	- Residential Roofing	310	$2,500	$1,400	4.7
	- Commercial Roofing	1,200	$8,400	$5,000	19
	Subtotal	1,700	$12,000	$6,900	26
TOTAL		76,000	$560,000	$340,000	1100.0

See notes next page.

Figure 2. Annual carbon savings relative to the business-as-usual case



Notes to Tables 7-10:

a) Columns values may not add up to total due to rounding.

b) Target market penetrations represent EPA's and DOE's best estimates of the percent of equipment shipped that is ENERGY STAR. These estimates are based on past market penetrations, manufacturer commitments, and EPA's and DOE's long-term goals. The 100 percent market penetration scenario assumes all equipment shipped from 2004 onward is ENERGY STAR-compliant.

c) Electricity is converted to primary energy using conversion factors given in Table 2.

d) Cumulative bill savings do not take into account increased investment costs. Cumulative bill savings are discounted using a 4 percent real discount rate.

e) Yearly U.S. average energy prices are from US DOE (1996a, 1996b, 1997b, 1998b, 1999, 2000, and 2001). See Table 2.

f) Carbon emissions for electricity are from Cadmus (1998) and EPA (2003). See Table 2.

Limitations of the Analysis

Our estimates of unit energy consumptions for office equipment and consumer electronics are calculated from underlying usage patterns and power consumption estimates. We face limitations on two fronts: First, there have been limited data collected for many of these products. As more information has become available, we have updated our forecasts, and we will continue to do so in the future. New information may change our estimates significantly. Second, there is great diversity in power consumption within each product category, and we lack the data to create a precise shipment-weighted average energy consumption.

Our analysis focuses exclusively on the ENERGY STAR Program and does not attempt to rigorously reconcile the projected effects of the program with the existence of other overlapping efficiency programs.

Procurement programs and utility rebate programs now often use the ENERGY STAR label to identify qualifying products, reducing the costs of designing and operating these programs while helping to boost the market share of ENERGY STAR products. This analysis does not attempt to account for these interactions, and therefore the savings presented here include savings that might legitimately be claimed by other energy conservation programs. Sorting through the universe of efficiency programs to assess all potential interactions was beyond the scope of this analysis. Care should be taken, therefore, in combining these savings forecasts with those of other programs.

Although our analysis takes into account existing and finalized future federal minimum efficiency standards, we chose not to speculate about possible future standards and how they might affect the savings due to the various ENERGY STAR labels in the future. Such standards would probably trigger a tightening in the ENERGY STAR requirement, which would reduce the number of products qualifying for a label. A stringent enough standard could even eliminate the need for an ENERGY STAR label. The products affected by federal minimum efficiency standards include central air conditioners, heat pumps, room air conditioners, furnaces, boilers, refrigerators, clothes washers and dishwashers.

Technological developments already on the horizon will likely force us to revise our forecast in the not-too-distant future. The rapid adoption of new television technologies (e.g. plasma, LCD and DLP) is undoubtedly changing TV power consumption. DVD players are rapidly supplanting VCRs in the market. We believe that EPA and DOE will try to leverage their existing partnerships with manufacturers to extend the ENERGY STAR label to new technologies. The face of office equipment is also changing as portable devices and wireless communication technologies take hold. While we try to capture the effects of existing trends, the future of many technologies is too nebulous to predict in a way that could be incorporated into this analysis.

The savings presented here are for the U.S. only. Since many of the ENERGY STAR products, notably office equipment, are marketed internationally, the global effects of the program may be significantly higher.

Our analysis extends only to 2020, and we made no attempt to account for savings that might accrue after that time.

Conclusions

ENERGY STAR has already proven successful in its established programs, having saved more than 700 trillion Btus of energy and prevented carbon emissions of 13 million metric tonnes in 2003 alone. Based on our analysis here, the continuation of those programs and the addition of new programs in appliances and home electronics have the potential to greatly reduce carbon emissions over the next 20 years. As EPA and DOE continue to work to improve savings through consumer education, partnerships with manufacturers, new product labels, and tightening requirements for existing products, the ENERGY STAR program may be able to achieve even higher savings in the future. If ENERGY STAR-labeled products could achieve 100 percent market penetration, $120 billion could be saved from estimated energy bills through 2010 (present value, at a 4 percent real discount rate).

References

A.D. Little, 1996. *Energy Savings Potential for Commercial Refrigeration Equipment.* Prepared for US DOE Office of Building Technology. June.

AD Little, 1998. *Electricity Consumption by Small End Uses in Residential Buildings.* Prepared for the US DOE Office of Building Technology. August.

Appliance, 1995. "Statistical Review." April, pp 45-48.

Appliance, 1996. "A Portrait of the U.S. Appliance Industry 1996." September, pp 85-91.

Appliance, 1998. "A Portrait of the U.S. Appliance Industry 1998." September, pp 67-73.

Appliance, 2003. "50th Annual Report: Statistical Review." May, pp 47-50.

Appliance, 2004. "27th Annual Portrait of the U.S. Appliance Industry." September, pp P1-P7.

Cadmus (the Cadmus Group, Inc.) and Energy Systems Consulting, Inc., 1998. *Regional Electricity Emissions Factors*. Prepared for the U.S. Environmental Protection Agency. May.

Cadmus (the Cadmus Group, Inc.). 1999. *Preliminary Market Background Report for Residendtial Ventilation Fans*. Prepared for the U.S. Environmental Protection Agency. June.

Cadmus (the Cadmus Group, Inc.). 1999. *Preliminary Market Background Report for Residential Dehumidifiers*. Prepared for the U.S. Environmental Protection Agency. September.

Cadmus (the Cadmus Group, Inc.). 2000. *Product Testing and Analysis of Water Dispensers*. Prepared for the U.S. Environmental Protection Agency. February.

Cadmus (the Cadmus Group, Inc.). 2001. *Preliminary Market Background Report for Commercial Reach-In Refrigerators and Freezers*. Prepared for the U.S. Environmental Protection Agency. March.

Calwell, C., 1999. "Customers Turn Out for Torchiere Trade-In." *Home Energy*, 16(2), pp 32-35.

Calwell, C. and C. Granda, 1999. *Halogen Torchiere Market Transformation: A Look at Progress to Date and Future Strategies*. Natural Resources Defense Council. September.

Calwell, C. and N. Horowitz. 2001. "Ceiling Fans: Fulfilling the Energy Efficiency Promise." *Home Energy*, January/February 2001, pp 24-29.

CEA Market Research. 2004. *U.S. Consumer Electronics Sales & Forecasts, 1999-2004*. January.

Fisher, Don. 2003. Personal communication: email exchange, March-June 2003.

Floyd, D. and C. Webber. 1998. "Leaking Electricity: Individual Field Measurements of Consumer Electronics." In *Proceedings of the 1998 Summer Study on Energy Efficiency in Buildings*. Washington DC: American Council for an Energy Efficient Economy.

Gartner. 2001. Special Report on PCs. Prepared for the Environmental Protection Agency Energy Star Program. November.

Guo, J. L., L. H. Lapera, A. Manning, P. Nappakaokeskui, M. Wyche, 1998. *Fall 1998 Report Forecasts: The Computer Hardware Industry*. Syracuse University Press. http://istweb.syr.edu/~ist775/spring98/hardware/profile_98.html.

ICF. 2002a. *Steamer Engineering Analysis*. Prepared for the Environmental Protection Agency Energy Star Program.

ICF. 2002b. *Fryer Engineering Analysis*. Prepared for the Environmental Protection Agency Energy Star Program.

ICF. 2002c. *ENERGY STAR® Product Development for Refrigerated Beverage Vending Machines Industry & Market Research and Analysis*. Prepared for the Environmental Protection Agency Energy Star Program.

ENERGY STAR® Product Development for
Refrigerated Beverage Vending Machines
Industry & Market Research and Analysis

IDC, 2003. *Worldwide PC Monitor Forecast and Analysis 2003-2007: It's a Flat-out Success*. December.

Isaacs, David (EIA/CEMA), 1998. Personal communication, discussion with Stephan Sylvan of EPA, September 3, 1997.

Koomey, Jonathan, Arthur H. Rosenfeld, and Ashok K. Gadgil. 1990. "Conservation Screening Curves to Compare Efficiency Investments to Power Plants." *Energy Policy*. vol. 18, no. 8. October. p. 774-782.

Koomey, Jonathan, Michael Cramer, Mary Ann Piette and Joseph Eto, 1995. *Efficiency Improvements in U.S. Office Equipment: Expected Policy Impacts and Uncertainties*. Lawrence Berkeley Laboratory. LBL-37383. December.

Lewis, J. E. and A. Clarke, 1990. *Replacement Market for Selected Commercial Energy Service Equipment* (Topical Report: Phase 1B--Commercial). Gas Research Institute. GRI-89/0204.02. June.

Lyra Research, Inc., 1998. *Single-Function Fax Machine Forecast*. Prepared exclusively for Environmental Protection Agency. March.

Media Metrix. 2001. *Softscan 3Q2001*.

National Lighting Product Information, 1994. Specifier Reports: Exit Signs. Volume 2, Number 2. Troy, NY: Lighting Research Center, Rensselaer Polytechnic Institute. March.

Nordman, B., M.A. Piette, B. Pon and K. Kinney, 1998. *It's Midnight...Is Your Copier On?: Energy Star Copier Performance*. Lawrence Berkeley National Laboratory. LBNL-41332, February.

NRDC. 2005. "Tuning into Energy Efficiecy: Prospects for Saving Energy in Televisions." Natural Resources Defense Council. January.

Piette, M.A., M. Cramer, J. Eto and J. Koomey, 1995. *Office Technology Energy Use and Savings Potential in New York*. Completed for the New York State Energy Research and Development Authority and Consolidated Edison by Lawrence Berkeley Laboratory. Contract #1955-EEED-BES-93, also LBL-36752. January.

Roberson, J., B. Nordman, R. Brown, C. Webber, J. Koomey. 2000. *Measured Low Power Levels in Personal Computers, Vintage 1990-2000*. Memo to Andrew Fanara and Marla Sanchez of EPA, July 14.

Roberson, J., G. Homan, A. Mahajan, B. Nordman, C. Webber, R. Brown, M. McWhinney, and J. Koomey. 2002. *Energy Use and Power Management in New Personal Computers and Monitors*. Lawrence Berkeley National Laboratory, LBNL-48581. July.

Roberson, J. A., C. Webber, M. McWhinney, R. Brown, M. Pinckard, Busch, J. 2004. *After-hours power status of office equipment and energy use of miscellaneous plug-load equipment*. Lawrence Berkeley National Laboratory, LBNL-53729 Rev. May

Rovi, J. 2001. *Personal Communication*. Excel file containing metered water cooler data received 5/14/01 via Email.

Rosen, K. and A. Meier. 1999. *Energy Use of Televisions and Videocassette Recorders in the U.S.* Berkeley, CA: Lawrence Berkeley National Laboratory. LBNL-42393. March.

Ruderman, H., J. Eto, K. Heinemier, A. Golan, and D. Wood. 1989. *Residential End-Use Load Shape Data Analysis: Final Report.* Berkeley, CA: Lawrence Berkeley National Laboratory. LBNL-27114. April.

Sanchez, M., J. Koomey, M. Moezzi, A. Meier, and W. Huber, 1998. *Miscellaneous Electricity Use in the U.S. Residential Sector*. Lawrence Berkeley National Laboratory. LBNL-40295, April.

Sanchez, M., A. Fanara, and R. Schmeltz, 2000. "New Product Development: The Pipeline for Future ENERGY STAR® Growth." In Proceedings of the 2000 ACEEE Summer Study on Energy Efficiency in Buildings, 6:343-354. American Council for an Energy Efficient Economy, Washington, DC.

Suozzo, M. and S. Nadel. 1998. *Selecting Targets for Market Transformation Programs: A National*

Analysis. American Council for an Energy Effici cient Economy, Washington, DC. August.

Thomas, A., M. Shincovich, S. Ryan, D. Korn, J. Shugars. 2002. "Replacing Distribution Transformers: A Hidden Opportunity for Energy Savings." In *Proceedings of the 2002 ACEEE Summer Study on Energy Efficiency in Buildings*. American Council for an Energy Effici cient Economy, Washington, DC.

U.S. Department of Commerce, 1997. *Electric Lighting Fixtures--1996*. Current Industrial Reports MA36L(96)-1. Bureau of the Census. September.

U.S. Department of Commerce, 2000. Implicit GDP Deflator. Bureau of Economic Analysis, http://www.bea.doc.gov/bea/dn1.htm. March 6.

US DOE, U.S. Department of Energy, 1995a. *Monthly Energy Review*. DOE/EIA-0035(95/05). Energy Information Administration. May.

US DOE, U.S. Department of Energy, 1995b. *Technical Support Document: Energy Efficiency Standards for Consumer Products: Refrigerators, Refrigerator/Freezers and Freezers*. Washington, DC.: US Department of Energy, Energy Efficiency and Renewable Energy, Office of Codes and Standards. DOE/EE-0064. July.

US DOE, U.S. Department of Energy, 1996a. *Annual Energy Outlook 1996 with Projections to 2015*. DOE/EIA-0383(96). Energy Information Administration. January.

US DOE, U.S. Department of Energy, 1996b. *Annual Energy Outlook 1997 with Projections to 2015*. DOE/EIA-0383(97). Energy Information Administration. December.

US DOE, U.S. Department of Energy, 1997a. *Technical Support Document for Energy Conservation Standards for Room Air Conditioners*. US Department of Energy, Energy Efficiency and Renewable Energy, Office of Codes and Standards. http://www.eren.doe.gov/buildings/codes_standards/reports/index.htm. September.

US DOE, U.S. Department of Energy, 1997b. *Annual Energy Outlook 1998 with Projections to 2020*. DOE/EIA-0383(98). Energy Information Administration. December.

US DOE, U.S. Department of Energy, 1998a. *Preliminary Technical Support Document: Energy Efficiency Standards for Consumer Products: Clothes Washers (TSD)*. Washington, DC: US Department of Energy, Energy Efficiency and Renewable Energy, Office of Codes and Standards. October.

US DOE, U.S. Department of Energy, 1998b. *Annual Energy Outlook 1999 with Projections to 2020*. DOE/EIA-0383(99). Energy Information Administration. December.

US DOE, U.S. Department of Energy, 1999. *Annual Energy Outlook 2000 with Projections to 2020*. DOE/EIA-0383(2000). Energy Information Administration. December.

US DOE, U.S. Department of Energy, 1999. *Life Cycle Cost of Clothes Washers*. Excel Spreadsheet lcccw_10_0001.xls created by Peter Biermeyer of LBNL. Downloaded from http://www.eren.doe.gov/buildings/codes_standards/applbrf/clwasher.html. March.

US DOE, U.S. Department of Energy, 1999. *A Look at Residential Energy Consumption in 1997*. DOE/EIA-0632(1997). Energy Information Administration. November.

US DOE, U.S. Department of Energy, 2004. *Residential Energy Consumption Survey 2001: Housing Characteristics Data Tables*. Energy Information Administration. http://www.eia.doe.gov/emeu/recs/recs2001/detail_tables.html.

US DOE, U.S. Department of Energy, 2000. *Annual Energy Outlook 2001 with Projections to 2020*. DOE/EIA-0383(2001). Energy Information Administration. December.

Vorsatz, D., L. Shown, J. Koomey, M. Moezzi, A. Denver, and B. Atkinson, 1997. *Lighting Market Sourcebook for the U.S.* Lawrence Berkeley National Laboratory, LBNL-39102. December.

Webber, C., J. Roberson, R. Brown, C. Payne, B. Nordman, J. Koomey. 2001. *Field Surveys of Office Equipment Operating Patterns*. Lawrence Berkeley National Laboratory, LBNL-46930. September.

Webber, C., R. Brown, J. Koomey. 1999. "Savings Estimates for the ENERGY STAR® Voluntary Labeling Program." *Energy Policy* 28(2000)1137-1149.

Webber, C., R. Brown, A. Mahajan and J. Koomey. 2002. *2002 Status Report. Savings Estimates for the ENERGY STAR® Voluntary Labeling Program*. Lawrence Berkeley National Laboratory, LBNL-48496. February.

Wenzel, T., J. Koomey, G. Rosenquist, M. Sanchez and J. Hanford, 1997. *Energy Data Sourcebook for the U.S. Residential Sector*. Lawrence Berkeley National Laboratory, LBNL-40297. September.

Zabrowski, D. 2003. *Personal Communication.* Excel spreadsheet "HFHC Data Needs Assessment" received via email 6/2/2003.