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2005 Status Report
Savings Estimates for the ENERGY STAR[®] Voluntary Labeling Program

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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 forty 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 2004, what we expect in 2005, and provide savings forecasts for two market penetration scenarios for the periods 2005 to 2010 and 2005 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.

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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. 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. 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

	Start /End Year		Start /End Year
Products/programs included in this analysis			
Computers.....	1992	Residential Lighting Fixtures.....	1997
Monitors.....	1992	TVs.....	1998
Printers.....	1993	VCRs.....	1998
Fax machines.....	1994	TV-VCRs.....	1998
Copiers.....	1995	Audio Equipment.....	1999
Air-Source Heat Pumps.....	1995	DVD Players.....	1999
Geothermal Heat Pumps.....	1995	Roofs.....	1999
Central Air Conditioning.....	1995	CFLs.....	1999 ^a
Gas Furnaces.....	1995	Traffic Signals.....	2000
Oil Furnaces.....	1995	Bottled Water Coolers.....	2000
Programmable Thermostats.....	1995	Exhaust Fans.....	2001
Transformers.....	1995	Ceiling Fans.....	2001
Gas Boilers.....	1996	Dehumidifiers.....	2001
Oil Boilers.....	1996	Commercial Refrigerators and Freezers.....	2001
Exit Signs.....	1996	Set-top Boxes.....	2001-200X ^b
Dishwashers.....	1996 ^a	Telephony.....	2002
Room Air Conditioners.....	1996 ^a	Hot Food Holding Cabinets.....	2003
Residential Refrigerators.....	1996 ^a	Commercial Steam Cookers.....	2003
Clothes Washers.....	1997 ^a	Commercial Fryers.....	2003
Scanners.....	1997	Cold Beverage Vending Machines.....	2004
MFDs.....	1997	External Power Adapters.....	2005
Products/programs not included in this analysis			
Gas-Fired Heat Pumps.....	1995-2000	Windows.....	1998 ^a
Homes.....	N	Buildings.....	N
Insulation.....	1996-2001	Home Improvement Program.....	N

^aDOE Product

^bWith the exception of digital television adapters, set-top boxes have been dropped from the Energy Star Program. Set-top boxes are included in the analysis, but except for digital television adapters, sales of Energy Star products are zero after 2004.

Also in 1996, EPA introduced labels for exit signs, insulation and residential boilers. The following year, scanners, multi-function devices¹ 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

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.

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 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).

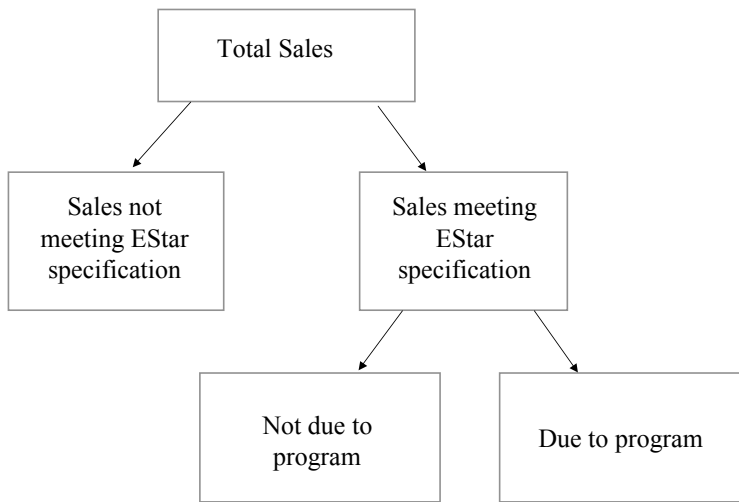
Historically, the focus of the ENERGY STAR program has been on energy savings and carbon emissions reductions. During California's energy crisis in 2000, however, interest shifted to the impact of conservation programs on electrical system reliability. The peak impacts of an ENERGY STAR label depend 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.

Figure 1. Segmentation of product sales in the CCAP model



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 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,

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 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).

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 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 .

$$\begin{aligned} \text{Annual Energy Savings in Year } t &= \sum_{n=t-L}^t X_n UES_n \\ \text{Annual Energy Bill in Year } t \text{ (Undiscounted)} &= AES_t P_t \\ \text{Annual Carbon Savings in Year } t &= AES_t C_t \end{aligned}$$

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

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 and 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).

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

Year	Commercial Electricity Price 2003\$/kWh	Residential Electricity Price 2003\$/kWh	Gas Price 2003\$/ MBtu	Oil Price 2003\$/ MBtu	Price Source ^b	Carbon	Carbon Source	Electric Heat Rate Btu/kWh	Electric Heat Rate Source
						Emissions Factor for Electricity kg C/kWh			
1993	0.093	0.100	7.86	7.13	c	0.203	m	11,019	c
1994	0.092	0.099	7.35	7.47	d	0.203	m	10,948	d
1995	0.086	0.096	6.86	7.22	e	0.203	m	10,970	e
1996	0.085	0.094	6.98	7.98	f	0.203	m	10,866	f
1997	0.084	0.092	7.50	7.85	g	0.203	m	10,978	g
1998	0.082	0.090	7.30	6.77	h	0.203	m	10,891	h
1999	0.077	0.088	7.14	6.62	i	0.203	m	10,784	i
2000	0.077	0.086	6.98	6.47	j	0.203	m	11,181	j
2001	0.082	0.090	6.98	6.47	j	0.203	m	11,030	j
2002	0.080	0.086	7.82	8.37	k	0.203	m	11,008	k
2003	0.079	0.087	9.22	9.57	k	0.203	n	10,997	k
2004	0.079	0.086	9.94	10.54	k	0.203	n	10,957	k
2005	0.078	0.086	10.04	10.12	k	0.203	n	10,938	k
2010	0.068	0.078	7.79	8.29	k	0.168	n	10,754	k
2015	0.073	0.081	8.21	8.49	k	0.141	n	10,538	k
>2020	0.075	0.082	8.66	8.85	l	0.135	l	10,349	l

Notes to Table 2:

^aCarbon 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.

^bAll prices have been converted to 2000 dollars using implicit GDP deflators from the Department of Commerce (2000).

^cUS DOE (1996a)

^dUS DOE (1996b)

^eUS DOE (1997b)

^fUS DOE (1998b)

^gUS DOE (1999)

^hUS DOE (2000)

ⁱUS DOE (2001)

^jUS DOE (2003)

^kUS DOE (2005)

^lThe carbon coefficient for electricity, energy prices and heat rates are assumed to remain constant after 2020.

^mCadmus (1998)

ⁿEPA (2003).

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. 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. We estimate currently 98 percent of computers sold are ENERGY STAR-compliant, and that—prior to the addition of the active power requirement to the specification for monitors—a similarly large fraction (95 percent) of monitors were also compliant (Gartner 2001).

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.

Beginning in January 2005 EPA recently added a requirement that monitors meet an active power specification in addition to the existing low power requirement. 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.

Table 3. Enabling Rates for ENERGY STAR Office Equipment

Product	1993	1994	1995	1996	1997	2000	2005	2010	2015	2020
Copiers	NA	NA	76%	76%	76%	76%	29%	29%	29%	29%
Facsimile	NA	NA	90%	90%	90%	90%	90%	90%	90%	90%
Printers	80%	90%	96%	96%	96%	96%	95%	95%	95%	95%
Scanners	NA	NA	NA	NA	90%	90%	60%	60%	60%	60%
Office Multifunction	NA	NA	NA	NA	67%	77%	55%	59%	61%	61%
Office CRT Monitors	10%	15%	15%	59%	59%	59%	76%	77%	76%	76%
Office LCD Monitors	10%	15%	15%	59%	59%	59%	80%	81%	80%	80%
Office PCs	10%	15%	15%	10%	5%	5%	7%	8%	10%	11%
Residential Multifunction	NA	NA	NA	NA	NA	97%	94%	96%	96%	97%
Residential CRT Monitors	10%	15%	15%	59%	59%	59%	71%	71%	71%	71%
Residential LCD Monitors	10%	15%	15%	59%	59%	59%	75%	75%	75%	75%
Residential PCs	10%	15%	15%	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).

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

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.

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

New federal minimum efficiency standards for central air conditioners and air-source heat pumps began 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

⁶ AFUE is average fuel utilization efficiency and SEER is seasonal energy efficiency ratio.

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.

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 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).

Telephony

Telephony equipment consists of answering machines plus cordless telephones and telephone combination units, either of which may include digital spread spectrum (DSS) functionality. Initial sales estimates came from *Appliance* (May 2002). The energy use by non-Energy Star units is calculated from Rosen et al. 2001. The estimate of the number of units meeting the Energy Star criterion came from LBNL metering. Growth in the unit sales of answering machines are from CEA (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 two segments, indoor fixtures and outdoor fixtures.⁸ Shipment data for 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

⁸ Formerly, torchieres were split out from indoor fixtures because of the rapid growth of high-wattage halogen fixtures using 300 to 500 watts. That market trend seems to have run its course, however, and sales of halogen torchieres have declined somewhat. We therefore no longer split out torchieres.

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.⁹ 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).

⁹ 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.

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 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 five earlier reports (Webber et al. 1999, 2002, 2003, 2004, and 2005). EPA received data from manufacturers on the number of Energy Star units shipped for audio/DVD, boilers, ceiling fans, commercial refrigerators and freezers, dehumidifiers, exit signs, geothermal heat pumps, residential lighting fixtures, roof products, set-top boxes, telephony, traffic signals, transformers, ventilating fans and water coolers. This data were the results of the third 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.

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, telephony and commercial hot food holding cabinets.

Tables 5 and 6 show annual energy, dollar, and carbon savings for 2004 and 2005, 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 2004 were 801 trillion Btu and \$5.5 billion. These compare to 720 million Btus and \$4.9 Billion saved in 2003. By 2005, energy savings are expected to reach 890 trillion Btu and \$6.1 billion. The peak demand reduction due to the ENERGY STAR labeling program was 7.9 gigawatts in 2004 and is expected to increase to 8.7 gigawatts in 2005.

Table 4. Annual and Lifetime Savings per Unit for ENERGY STAR® Devices Sold in 2004

	Annual Energy Savings	Annual Unit Primary Energy Savings	Annual Bill Savings due to Energy Star	Product Lifetime	Lifetime Primary Energy Savings	Lifetime Energy Bill Savings, Undiscounted
	%	Primary Mbtu	\$2000	Years	Primary Mbtu	\$2000
Office Equipment						
- Office PC	73%	2.8	\$19	4	11	\$74
- Office CRT Monitor	83%	4.3	\$28	4	17	\$111
- Office LCD Monitor	80%	2.2	\$15	4	9	\$57
- Home PC	40%	0.63	\$5	8	5.0	\$37
- Home CRT Monitor	48%	0.91	\$7	8	7.1	\$52
- Home LCD Monitor	42%	0.40	\$3	8	3.2	\$23
- Fax	40%	1.4	\$9	4	5.4	\$36
- Copier (1)	42%	3.6	\$24	6	22	\$141
- Multifunction Device	16%	4.9	\$33	6	29	\$191
- Scanner	49%	0.8	\$5	4	3.2	\$21
- Printer	27%	2.0	\$15	5	10.1	\$71
Consumer Electronics						
- TVs	28%	0.46	\$3.3	11	4.9	\$30
- VCRs	26%	0.16	\$1.1	11	1.7	\$8
- TV/VCRs	67%	0.54	\$3.9	11	5.8	\$27
- DVD Players	59%	0.33	\$2.4	7	2.3	\$17
- Audio Equipment	77%	0.73	\$5.3	7	5.0	\$47
- Telephony	63%	0.20	\$1.4	7	1.4	\$10
- Set-top Boxes	17%	0.38	\$2.7	7	2.6	\$19.0
Heating and Cooling						
- Furnace (Gas or Oil)	15%	13	\$88	18	228	\$1,589
- Central Air Conditioner	24%	8.3	\$60	14	112	\$832
- Air-Source Heat Pump	18%	25	\$125	12	286	\$1,484
- Geothermal Heat Pump	30%	55.4	\$402	15	800	\$5,968
- Boiler (Gas or Oil)	6%	6.1	\$41	20	121	\$830
- Programmable Thermostat	14%	22	\$155	15	323	\$2,318
- Unitary HVAC		4.04				
Residential and Commercial Lighting						
- Fixtures	77%	0.8	\$6	20	14.9	\$113
- CFLs	67%	0.9	\$7	(4)	5.6	\$38
- Exit Sign	41%	0.3	\$2	10	3.1	\$20
- Traffic Signal	89%	5.4	\$36	10	52.3	\$345
Residential Appliances						
- Room Air Conditioners	10%	0.7	\$4.9	13	8	\$62
- Dehumidifiers	10%	1.2	\$9.0	12	14	\$107
- Exhaust Fans	63%	0.6	\$4.2	10	6	\$41
- Ceiling Fans	51%	1.6	\$11.6	10	16	\$115
- Dishwashers	25%	1.06	\$7.5	13	14	\$97
- Refrigerators	15%	0.8	\$6.1	19	15	\$115
- Freezers	15%	0.7	\$4.8	19	12	\$90
- Clothes Washers	31%	2.69	\$19	14	38	\$266
Commercial Appliances						
- Water Coolers	45%	2.5	\$16.7	10	24	\$180
- Commercial Refrigeration	43%	20.0	\$133.3	10	195	\$1,288
- Hot Food Holding Cabinets	59%	43.7	\$291.0	15	631	\$4,216
- Fryers	21%	24.6	\$167.2	10	246	\$1,662
- Steamers	58%	84.2	\$565.6	10	842	\$5,532
- Vending Machines	25%	13.8	\$92.1	14	187	\$1,245
Other						
- Utility Transformers	5%	0.58	\$3.8	20	10.98	\$74
- C&I Transformers	26%	10.4	\$69.3	35	342.82	\$2,362
- Residential Roofing (per 1000 sqft)	n/a	1.0	\$7.3	20	18.3	\$183
- Commercial Roofing (per 1000 sqft)	n/a	1.98	\$13	7	13.6	\$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.
- 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 2004

Program	Primary Energy Savings	Energy Bill Savings, undiscounted	Carbon Emissions Avoided	Conservation Load Factor	Peak Load Savings
	trillion Btu	million \$2000	MMTC		GW
Office Equipment					
- Computers All	250	1694	4.80	-	-
CPU Office	-	-	-	0.99	0.14
CPU Home	-	-	-	2.40	0.032
Monitors Office	-	-	-	1.10	1.37
Monitors Home	-	-	-	2.30	0.16
- Faxes	10.0	69.0	0.20	1.00	0.11
- Copiers	7.90	53.0	0.15	5.20	0.019
- Multifunction Devices	30.0	197	0.57	0.92	0.34
- Scanners	19.0	124	0.36	0.32	0.63
- Printers	140	935	2.69	7.40	0.44
Subtotal	457	3071	8.74	1.30	3.24
Consumer Electronics					
- TVs	26.6	193	0.51	1.00	0.29
- VCRs	15.4	112	0.29	1.00	0.17
- TV/VCRs	11.4	82.4	0.22	1.00	0.12
- DVD Players	13.3	96.6	0.25	1.00	0.14
- Audio Equipment	11.3	82.3	0.22	1.00	0.12
- Telephony	1.96	14.2	0.037	1.00	0.021
- Set-top Boxes	0.06	0.41	0.00	0.75	0.0010
Subtotal	80.0	580	1.53	1.00	0.86
Heating and Cooling					
- Furnaces (Gas or Oil)	8.50	58.6	0.13	N/A	N/A
- Central Air Conditioners	4.78	34.7	0.091	0.15	0.34
- Air-Source Heat Pumps	2.36	17.1	0.045	0.15	0.063
- Geothermal Heat Pumps (4)	0.25	1.84	0.005	0.15	0.0021
- Boilers (Gas or Oil)	2.58	19	0.044	N/A	N/A
- Programmable Thermostats	41.9	296	0.71	0.15	0.62
- Unitary HVAC	1.01	6.75	0.019	0.15	0.073
Subtotal	61.4	434	1.04	0.16	1.10
Residential and Commercial Lighting					
- Residential Lighting Fixtures	56.0	406	1.1	1.00	0.59
- CFLs	75.4	547	1.4	1.00	0.79
- Exit Signs	4.93	32.8	0.1	1.00	0.05
- Traffic Signals	7.46	49.7	0.143	1.00	0.04
Subtotal	144	1036	2.7	1.00	1.51
Residential Appliances					
- Room Air Conditioners	8.60	62.0	0.16	0.15	0.61
- Dehumidifiers	1.70	12.0	0.032	0.40	0.046
- Exhaust Fans	0.31	2.20	0.006	-	-
(fans)	-	-	-	1.00	0.0028
(lighting)	-	-	-	0.85	0.00061
- Ceiling Fans	0.14	1.00	0.003	-	-
(fans)	-	-	-	1.00	0.00013
(lighting)	-	-	-	0.99	0.0014
- Dishwashers	10.9	77.4	0.19	0.76	0.11
- Refrigerators	10.2	74.1	0.20	0.95	0.12
- Freezers	0.23	1.63	0.0043	0.95	0.0025
- Clothes Washers	19.66	140	0.35	0.66	0.22
Subtotal	51.7	371	0.94	0.41	1.10
Commercial Appliances					
- Water Coolers	3.59	23.9	0.07	0.70	0.058
- Commercial Refrigeration	1.57	10.4	0.03	0.95	0.018
- Hot Food Holding Cabinets	0.05	0.30	0.00	0.95	0.00051
- Fryers	0.16	1.10	0.00	0.95	0.00011
- Steamers	0.12	0.81	0.00	0.95	0.00084
- Vending Machines	1.04	6.9	0.02	1.80	0.010
Subtotal	6.53	43.5	0.12	0.85	0.087
Other					
- Utility Transformers	0.13	0.86	0.0025	1.00	0.0014
- C&I Transformers	0.18	1.19	0.0034	0.77	0.0025
- Residential Roofing	0.046	0.34	0.00097	0.15	0.0062
- Commercial Roofing	0.15	0.99	0.003	0.15	0.016
Subtotal	0.50	3.39	0.0099	0.26	0.026
Subtotal EPA & DOE Labeled Products	801	5538	15.13	0.93	7.90

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. (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 2005

Program	Primary Energy Savings	Energy Bill Savings, undiscounted	Carbon Emissions Avoided	Conservation Load Factor	Peak Load Savings
	trillion Btu	million \$2000	MMTC		GW
Office Equipment					
- Computers All	250.0	1660	4.70	-	-
CPU Office	-	-	-	0.99	0.16
CPU Home	-	-	-	2.40	0.037
Monitors Office	-	-	-	1.10	0.95
Monitors Home	-	-	-	2.30	0.15
- Faxes	8.80	57.9	0.17	1.00	0.09
- Copiers	5.00	33.2	0.10	5.20	0.013
- Multifunction Devices	30.00	199	0.58	0.93	0.35
- Scanners	20.00	131	0.38	0.32	0.68
- Printers	170.0	1125	3.30	7.40	0.52
Subtotal	480.0	3207	9.30	1.40	2.96
Consumer Electronics					
- TVs	31.6	228	0.60	1.00	0.34
- VCRs	14.8	107	0.28	1.00	0.16
- TV/VCRs	13.3	95.7	0.25	1.00	0.14
- DVD Players	18.6	134.3	0.36	1.00	0.20
- Audio Equipment	13.9	100.3	0.27	1.00	0.15
- Telephony	3.36	24.2	0.064	1.00	0.036
- Set-top Boxes	0.12	0.87	0.00	0.74	0.0019
Subtotal	95.63	690	1.80	1.00	1.03
Heating and Cooling					
- Furnaces (Gas or Oil)	10.59	73.3	0.16	N/A	N/A
- Central Air Conditioners	5.47	39.4	0.100	0.15	0.39
- Air-Source Heat Pumps	2.45	17.7	0.047	0.15	0.065
- Geothermal Heat Pumps (4)	0.32	2.32	0.006	0.15	0.0027
- Boilers (Gas or Oil)	3.21	23.2	0.054	N/A	N/A
- Programmable Thermostats	46.52	329	0.79	0.15	0.69
- Unitary HVAC	1.67	10.95	0.032	0.15	0.120
Subtotal	70.23	496	1.20	0.16	1.27
Residential and Commercial Lighting					
- Residential Lighting Fixtures	69.5	501	1.30	1.00	0.73
- CFLs	94.3	680	1.80	1.00	0.99
- Exit Signs	5.84	38.4	0.11	1.00	0.06
- Traffic Signals	8.83	58.0	0.09	1.00	0.10
Subtotal	178.49	1278	3.30	1.00	1.88
Residential Appliances					
- Room Air Conditioners	10.45	75.0	0.20	0.15	0.75
- Dehumidifiers	2.38	17.0	0.046	0.39	0.065
- Exhaust Fans	0.49	3.50	0.009	-	-
(fans)	-	-	-	0.98	0.0043
(lighting)	-	-	-	0.78	0.00130
- Ceiling Fans	0.43	3.10	0.008	-	-
(fans)	-	-	-	1.00	0.00039
(lighting)	-	-	-	1.00	0.0041
- Dishwashers	13.8	98.4	0.25	0.76	0.14
- Refrigerators	11.2	81.1	0.22	0.95	0.13
- Freezers	0.44	3.16	0.0084	0.95	0.0050
- Clothes Washers	19.84	141	0.35	0.67	0.22
Subtotal	59.10	423	1.10	0.40	1.30
Commercial Appliances					
- Water Coolers	5.14	33.8	0.10	0.70	0.083
- Commercial Refrigeration	2.07	13.6	0.04	0.95	0.023
- Hot Food Holding Cabinets	0.14	0.90	0.00	0.95	0.00156
- Fryers	0.40	2.73	0.01	0.95	0.00026
- Steamers	0.29	1.96	0.01	0.95	0.00205
- Vending Machines	2.10	13.8	0.04	1.50	0.020
Subtotal	10.14	66.8	0.19	0.84	0.131
Other					
- Utility Transformers	0.16	1.00	0.003	1.00	0.0017
- C&I Transformers	0.19	1.30	0.0037	0.77	0.0027
- Residential Roofing	0.079	0.58	0.0017	0.15	0.0108
- Commercial Roofing	0.45	2.90	0.0091	0.15	0.047
Subtotal	0.88	5.80	0.018	0.20	0.063
Subtotal EPA & DOE Labeled Products	890	6100	17.00	0.92	8.66

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.

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 2005 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 2005-2010 and 2005-2020, respectively. All the products together are expected to save 6.6 quadrillion Btu (quads) by 2010, growing to 23 quads by 2020. These savings correspond to \$46 Billion (undiscounted) in energy bill reduction in 2010, increasing to \$171 in 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, followed by CFLs and residential lighting fixtures, in that order. By 2020, the same four products take the top four slots, with computers followed by printers, then residential lighting fixtures and CFLs, the last two now essentially neck and neck. 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 2005 to 2010. 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 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 19 quads from 2005 to 2010, growing to 69.6 quads by 2020. These correspond to a total energy bill savings of \$133 billion (undiscounted) through 2010, and

\$502 billion through 2020. 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. Under the target market penetration we forecast 115 million metric tons of carbon emissions avoided in 2010 increasing to 335 MMTC in 2020, while under the 100% market penetration scenario the forecast for 2010 is 325 million metric tons of carbon emissions avoided increasing to 1037 MMTC in 2020.

Table 7. Cumulative Savings 2005-2010, Target Market Penetration

Program -Equipment	Primary Energy Savings	Energy Bill Savings Million \$2000		Carbon Avoided
	Trillion Btu	Undiscounted	Discounted	MMTC
Office Equipment				
- Computers	1,564	\$10,504	\$7,821	27.8
- Faxes	38	\$250	\$189	0.69
- Copiers	9	\$62	\$49	0.18
- Multifunction Devices	157	\$1,030	\$774	2.82
- Scanners	142	\$932	\$690	2.52
- Printers	1,177	\$8,548	\$6,306	20.9
Subtotal	3,089	\$21,325	\$15,830	54.9
Consumer Electronics				
- TVs	234	\$1,717	\$1,273	4.15
- VCRs	41	\$299	\$234	0.76
- TV/VCRs	87	\$640	\$476	1.55
- DVD Players	183	\$1,342	\$986	3.21
- Audio Equipment	114	\$840	\$620	2.02
- Telephony	58	\$424	\$307	1.00
- Set-top Boxes	3	\$26	\$15	0.060
Subtotal	720	\$5,288	\$3,910	12.75
Heating and Cooling				
- Furnaces (Gas or Oil)	99.39	\$685	\$503	1.49
- Central Air Conditioners	31.80	\$0	\$0	0.001
- Air-Source Heat Pumps	11	\$81	\$62	0.20
- Geothermal Heat Pumps (4)	3	\$24	\$17	0.056
- Boilers (Gas or Oil)	29.1	\$211	\$155	0.49
- Programmable Thermostats	344	\$2,440	\$1,806	5.58
- Unitary HVAC	24	\$157	\$114	0.42
Subtotal	543	\$3,599	\$2,658	8.24
Residential and Commercial Lighting				
- Residential Lighting Fixtures	653	\$4,799	\$3,520	11.47
- CFLs	819	\$6,015	\$4,428	14.42
- Exit Signs	43	\$283	\$210	0.77
- Traffic Signals	67.4	\$441	\$326	1.19
Subtotal	1,582	\$11,538	\$8,484	27.85
Residential Appliances				
- Room Air Conditioners	96	\$704	\$517	1.68
- Dehumidifiers	25	\$183	\$134	0.44
- Exhaust Fans	7	\$48	\$35	0.11
- Ceiling Fans	12	\$87	\$62	0.20
- Dishwashers	133.3	\$957	\$702	2.22
- Refrigerators	88	\$644	\$475	1.55
- Freezers	7	\$51	\$37	0.12
- Clothes Washers	121	\$868	\$648	2.03
Subtotal	488	\$3,543	\$2,610	8.4
Commercial Appliances				
- Water Coolers	57	\$375	\$274	1.00
- Commercial Refrigeration	22	\$144	\$105	0.38
- Hot Food Holding Cabinets	4	\$26	\$19	0.07
- Fryers	10	\$68	\$48	0.15
- Steamers	7	\$47	\$34	0.11
- Vending Machines	30	\$196	\$137	0.52
Subtotal	130	\$855	\$617	2.24
Other				
- Utility Transformers	1	\$6	\$5	0.02
- C&I Transformers	1	\$7	\$6	0.02
- Residential Roofing	2	\$13	\$9	0.03
- Commercial Roofing	13	\$82	\$58	0.22
Subtotal	16	\$109	\$78	0.29
Subtotal EPA and DOE Labelled Products	6,568	\$46,257	\$34,188	114.6

See notes after Table 10.

Table 8. Cumulative Savings 2005-2020, Target Market Penetrations

Program -Equipment	Primary Energy Savings	Energy Bill Savings Million \$2000		Carbon Avoided
	Trillion Btu	Undiscounted	Discounted	MMTC
Office Equipment				
- Computers	4,780	\$33,032	\$20,053	74.1
- Faxes	79	\$528	\$342	1.28
- Copiers	10	\$68	\$53	0.19
- Multifunction Devices	403	\$2,707	\$1,689	6.36
- Scanners	435	\$2,936	\$1,784	6.75
- Printers	3,544	\$28,981	\$17,435	55.0
Subtotal	9,251	\$68,251	\$41,356	143.8
Consumer Electronics				
- TVs	701	\$5,286	\$3,221	10.89
- VCRs	42	\$305	\$238	0.77
- TV/VCRs	257	\$1,938	\$1,184	4.00
- DVD Players	617	\$4,659	\$2,793	9.48
- Audio Equipment	364	\$2,746	\$1,656	5.62
- Telephony	415	\$3,167	\$1,767	6.11
- Set-top Boxes	27	\$205	\$94	0.395
Subtotal	2,423	\$18,307	\$10,953	37.27
Heating and Cooling				
- Furnaces (Gas or Oil)	503	\$3,519	\$2,015	7.31
- Central Air Conditioners	54	\$0	\$0	0.001
- Air-Source Heat Pumps	13	\$96	\$71	0.23
- Geothermal Heat Pumps (4)	18	\$140	\$79	0.273
- Boilers (Gas or Oil)	130.8	\$984	\$570	2.22
- Programmable Thermostats	1,024	\$7,399	\$4,518	15.67
- Unitary HVAC	178	\$1,215	\$672	2.61
Subtotal	1,921	\$13,354	\$7,925	28.31
Residential and Commercial Lighting				
- Residential Lighting Fixtures	3,347	\$25,453	\$14,510	49.98
- CFLs	3,210	\$24,308	\$14,301	48.79
- Exit Signs	109	\$731	\$458	1.72
- Traffic Signals	206.8	\$1,394	\$849	3.21
Subtotal	6,872	\$51,886	\$30,119	103.7
Residential Appliances				
- Room Air Conditioners	399	\$3,025	\$1,769	6.04
- Dehumidifiers	114	\$867	\$503	1.72
- Exhaust Fans	39	\$298	\$169	0.58
- Ceiling Fans	128	\$977	\$529	1.85
- Dishwashers	572.6	\$4,215	\$2,462	8.54
- Refrigerators	349	\$2,647	\$1,555	5.31
- Freezers	48	\$367	\$204	0.71
- Clothes Washers	225	\$1,633	\$1,096	3.56
Subtotal	1,875	\$14,028	\$8,287	28.3
Commercial Appliances				
- Water Coolers	263	\$1,787	\$1,037	3.97
- Commercial Refrigeration	107	\$729	\$418	1.61
- Hot Food Holding Cabinets	44	\$299	\$162	0.63
- Fryers	94	\$644	\$354	1.35
- Steamers	65	\$444	\$245	0.94
- Vending Machines	176	\$1,201	\$652	2.61
Subtotal	749	\$5,104	\$2,867	11.11
Other				
- Utility Transformers	2	\$16	\$10	0.04
- C&I Transformers	3	\$20	\$12	0.05
- Residential Roofing	20	\$159	\$85	0.29
- Commercial Roofing	119	\$812	\$443	1.73
Subtotal	144	\$1,007	\$551	2.10
Subtotal EPA and DOE Labelled Products	23,236	\$171,937	\$102,058	355

See notes after Table 10.

Table 9. Cumulative Savings 2005-2010, 100% Market Penetration

Program	Primary Energy Savings	Energy Bill Savings Million \$2000		Carbon Avoided
	Trillion Btu	Undiscounted	Discounted	MMTC
-Equipment				
Office Equipment				
- Computers	1,732	\$11,627	\$8,635	30.7
- Faxes	39	\$252	\$191	0.69
- Copiers	10	\$63	\$50	0.18
-Multifunction Devices	166	\$1,089	\$817	2.98
- Scanners	160	\$1,045	\$773	2.82
- Printers	1,180	\$8,570	\$6,322	20.9
Subtotal	3,286	\$22,646	\$16,788	58.3
Consumer Electronics				
- TVs	379	\$2,788	\$2,046	6.67
-VCRs	41	\$301	\$235	0.76
-TV/VCRs	116	\$848	\$627	2.04
-DVD Players	240	\$1,763	\$1,290	4.20
-Audio Equipment	237	\$1,748	\$1,276	4.16
-Telephony	245	\$1,809	\$1,302	4.24
-Set-top Boxes	161	\$1,188	\$699	2.77
Subtotal	1,419	\$10,444	\$7,476	24.85
Heating and Cooling				
- Furnaces (Gas or Oil)	727	\$5,030	\$3,641	11.03
- Central Air Conditioners	401	\$3	\$2	0.007
- Air-Source Heat Pumps	28	\$205	\$155	0.50
- Geothermal Heat Pumps (4)	37	\$273	\$197	0.643
- Boilers (Gas or Oil)	45.2	\$323	\$236	0.74
- Programmable Thermostats	857	\$6,085	\$4,443	13.83
- Unitary HVAC	524	\$3,432	\$2,484	9.10
Subtotal	2,620	\$15,352	\$11,158	35.86
Residential and Commercial Lighting				
- Residential Lighting Fixtures	1,925	\$14,181	\$10,299	33.56
- CFLs	7,307	\$53,539	\$39,983	130.20
- Exit Signs	43	\$284	\$211	0.77
- Traffic Signals	67.4	\$441	\$326	1.19
Subtotal	9,343	\$68,445	\$50,820	165.73
Residential Appliances				
- Room Air Conditioners	158	\$1,164	\$849	2.77
- Dehumidifiers	32	\$239	\$174	0.57
- Exhaust Fans	72	\$532	\$385	1.25
- Ceiling Fans	557	\$4,111	\$2,969	9.68
- Dishwashers	219.1	\$1,575	\$1,149	3.635
- Refrigerators	247	\$1,819	\$1,324	4.31
- Freezers	40	\$292	\$211	0.69
- Clothes Washers	348	\$2,506	\$1,854	5.86
Subtotal	1,674	\$12,238	\$8,914	28.8
Commercial Appliances				
- Water Coolers	82	\$536	\$390	1.43
- Commercial Refrigeration	120	\$786	\$569	2.08
- Hot Food Holding Cabinets	19	\$124	\$90	0.33
- Fryers	50	\$337	\$243	0.73
- Steamers	33	\$217	\$157	0.52
- Vending Machines	54	\$354	\$247	0.94
Subtotal	357	\$2,354	\$1,696	6.04
Other				
- Utility Transformers	5	\$32	\$24	0.09
- C&I Transformers	16	\$107	\$80	0.29
- Residential Roofing	43	\$332	\$240	0.81
- Commercial Roofing	260	\$1,693	\$1,223	4.69
Subtotal	325	\$2,164	\$1,566	5.88
Subtotal EPA and DOE Labelled Products	19,023	\$133,643	\$98,418	325.4

See notes after Table 10.

Table 10. Cumulative Savings 2005-2020, 100% Market Penetration

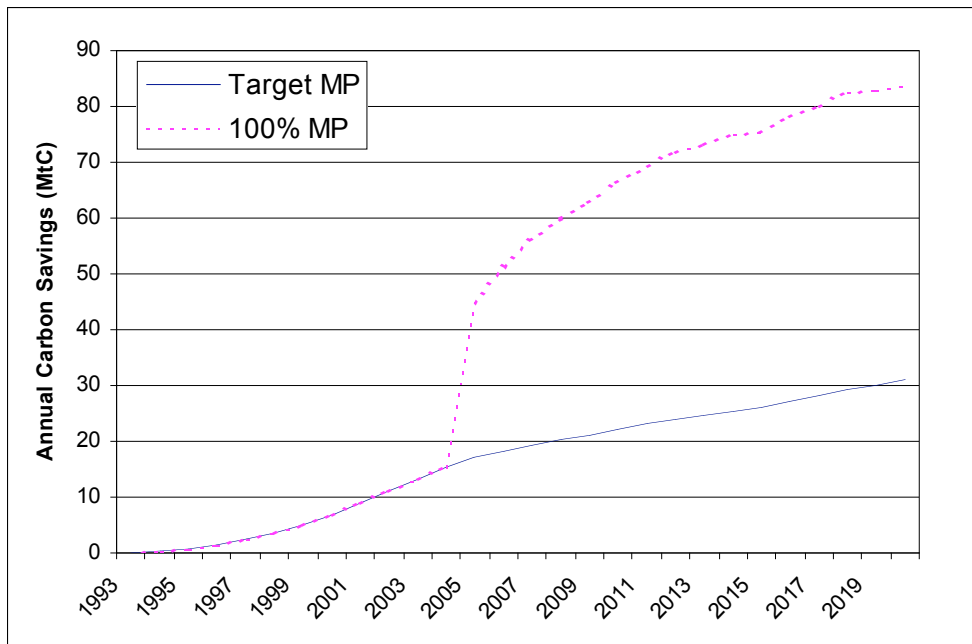
Program -Equipment	Primary Energy Savings	Energy Bill Savings Million \$2000		Carbon Avoided
	Trillion Btu	Undiscounted	Discounted	MMTC
Office Equipment				
- Computers	5,390	\$37,278	\$22,568	83.5
- Faxes	80	\$534	\$346	1.29
- Copiers	11	\$69	\$54	0.19
- Multifunction Devices	438	\$2,949	\$1,832	6.90
- Scanners	485	\$3,272	\$1,989	7.53
- Printers	3,554	\$29,068	\$17,486	55.2
Subtotal	9,959	\$73,170	\$44,274	154.6
Consumer Electronics				
- TVs	1,452	\$10,986	\$6,508	22.13
- VCRs	42	\$308	\$239	0.78
- TV/VCRs	381	\$2,878	\$1,734	5.88
- DVD Players	815	\$6,160	\$3,698	12.53
- Audio Equipment	941	\$7,126	\$4,212	14.32
- Telephony	1,153	\$8,743	\$5,090	17.36
- Set-top Boxes	952	\$7,239	\$3,390	14.15
Subtotal	5,737	\$43,440	\$24,872	87.15
Heating and Cooling				
- Furnaces (Gas or Oil)	4,707	\$33,198	\$18,607	69.07
- Central Air Conditioners	1,701	\$13	\$8	0.026
- Air-Source Heat Pumps	57	\$425	\$274	0.92
- Geothermal Heat Pumps (4)	266	\$2,028	\$1,125	3.904
- Boilers (Gas or Oil)	231.8	\$1,704	\$974	3.78
- Programmable Thermostats	4,016	\$29,167	\$16,856	60.58
- Unitary HVAC	3,034	\$20,664	\$11,688	45.04
Subtotal	14,012	\$87,198	\$49,532	183.31
Residential and Commercial Lighting				
- Residential Lighting Fixtures	11,167	\$85,007	\$48,027	165.69
- CFLs	16,901	\$126,692	\$80,585	269.72
- Exit Signs	109	\$733	\$460	1.73
- Traffic Signals	206.8	\$1,394	\$849	3.21
Subtotal	28,384	\$213,826	\$129,920	440.34
Residential Appliances				
- Room Air Conditioners	803	\$6,101	\$3,499	12.01
- Dehumidifiers	154	\$1,167	\$676	2.31
- Exhaust Fans	390	\$2,966	\$1,702	5.83
- Ceiling Fans	3,063	\$23,271	\$13,337	45.70
- Dishwashers	1,097.7	\$8,092	\$4,654	16.25
- Refrigerators	1,354	\$10,296	\$5,850	20.15
- Freezers	256	\$1,948	\$1,091	3.77
- Clothes Washers	968	\$7,132	\$4,423	14.84
Subtotal	8,085	\$60,974	\$35,231	120.9
Commercial Appliances				
- Water Coolers	400	\$2,718	\$1,570	6.01
- Commercial Refrigeration	617	\$4,186	\$2,410	9.23
- Hot Food Holding Cabinets	114	\$773	\$436	1.68
- Fryers	284	\$1,944	\$1,112	4.11
- Steamers	171	\$1,168	\$672	2.52
- Vending Machines	343	\$2,339	\$1,263	5.07
Subtotal	1,929	\$13,129	\$7,463	28.62
Other				
- Utility Transformers	13	\$85	\$53	0.20
- C&I Transformers	42	\$285	\$178	0.67
- Residential Roofing	276	\$2,207	\$1,237	4.12
- Commercial Roofing	1,163	\$7,868	\$4,588	17.74
Subtotal	1,495	\$10,445	\$6,055	22.73
Subtotal EPA and DOE Labelled Products	69,600	\$502,182	\$297,347	1037.6

See notes next page.

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.

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



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 800 trillion Btus of energy and prevented carbon emissions of 15 million metric tonnes in 2004 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, \$98 billion could be saved from estimated energy bills through 2010 (present value, at a 4 percent real discount rate).

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