

ENERGY STAR[®] Unit Shipment and Market Penetration Report

Calendar Year 2005 Summary

This is the fourth year in which ENERGY STAR collected unit shipment data from partners and/or their representative associations and used it to project market penetrations of ENERGY STAR products.

Data:

Data collected for the 2005 Unit Shipment and Market Penetration Report included ENERGY STAR shipments for the following products:

- Audio/DVD Products
- Boilers
- Ceiling Fans
- Central Air Conditioners/Air-Source Heat Pumps
- Commercial Fryers
- Commercial Hot Food Holding Cabinets
- Commercial Refrigerators and Freezers
- Commercial Steam Cookers
- Dehumidifiers
- End-Use Products with Qualified EPSs
- Exit Signs
- External Power Supplies
- Furnaces
- Geothermal Heat Pumps
- Light Commercial HVAC
- Monitors
- Residential Light Fixtures (RLF)
- Roof Products
- Room Air Cleaners
- Telephony
- Traffic Signals
- Transformers (Commercial & Industrial)
- TVs/VCRs
- Vending Machines
- Ventilating Fans
- Water Coolers

Methodology:

ENERGY STAR market penetrations for a given year are derived by dividing ENERGY STAR shipments over US shipments.

ENERGY STAR Shipment Data

ENERGY STAR shipment data is collected from partners each calendar year. EPA uses the reported partner data as the representative value of all ENERGY STAR shipments during that year. (i.e., No adjustments are made to the totals to account for partners that failed to report their ENERGY STAR shipments.) Using the reported data represents a conservative approach. Though this methodology may underestimate ENERGY STAR market penetration, the data is reliable and the technique

is easily recreated. Response rates for the majority of product categories are well over 80%, suggesting that the reported partner shipments are nearly approximate to actual total ENERGY STAR shipments.

US Shipment Data

US shipments are composed of both observed and modeled data, because manufacturers are not required to report total U.S. shipments as part of their ENERGY STAR partnership. Industry data is used as direct input when it is available, whether attained through a trade organization, publication, or market research. Otherwise, projections are used. These projections are based on previous data, and forecasts are revised and/or rectified or replaced with industry data each year or as soon as industry data becomes available. A complete list of sources for total U.S. shipments by product category is available in Sanchez, et al., 2007.

Response Rate:

Percent of Partners that Submitted Unit Shipment Data:

| Product Category | Response Rate (%) | 2005 Total Required to Respond |
|--|-------------------|--------------------------------|
| Audio/DVD | 100% | 9 |
| Boilers | 81% | 26 |
| Ceiling Fans | 100% | 25 |
| Central AC/Air-Source Heat Pump | 82% | 17 |
| Commercial Fryers | 100% | 5 |
| Commercial Hot Food Holding Cabinets | 100% | 8 |
| Commercial Refrigerators & Freezers | 94% | 17 |
| Commercial Steam Cookers | 100% | 7 |
| Dehumidifiers | 94% | 16 |
| EPS | 100% | 14 |
| EUPs w/ qualified EPSs | 100% | 4 |
| Exit Signs | 98% | 42 |
| Furnaces | 96% | 24 |
| Geothermal Heat Pumps | 67% | 12 |
| Light Commercial HVAC | 78% | 9 |
| Monitors | 85% | 41 |
| RLF | 93% | 76 |
| Roof Products | 89% | 178 |
| Room Air Cleaners | 91% | 11 |
| Telephony | 75% | 4 |
| Traffic Signals | 100% | 8 |
| Transformers ¹ | 96% | 26 |
| TV/VCR | 94% | 18 |
| Vending Machines | 100% | 3 |
| Ventilating Fans | 100% | 10 |
| Water Coolers | 100% | 12 |
| Total | 92% | 622 |
| ¹ Only Commercial & Industrial Transformer manufacturers were required to submit in 2005. | | |

Results:

ENERGY STAR Qualified Units Shipped & Corresponding Market Penetrations:

| Product Category | 2005 Units Shipped | 2005 Market Penetration |
|--------------------------------------|---|-------------------------|
| Audio/DVD* | 7,039,172 | |
| Home Theater | N/A | 22% |
| Audio Separates | N/A | 21% |
| DVD Players | N/A | 32% |
| Mini-Systems | N/A | 22% |
| Boilers | | |
| Residential Gas Boilers | 55,091 | 25% |
| Residential Oil Boilers | 83,434 | 51% |
| Ceiling Fans | | |
| Ceiling Fan Only | 3,022,565 | 39% |
| Ceiling Fan with Light Kit | 368,355 | 4% |
| Light Kit Only | 130,276 | 6% |
| Air-Source Heat Pumps | 568,421 | 27% |
| Central Air Conditioners | 1,245,729 | 19% |
| Commercial Fryers | 5,771 | 7% |
| Commercial Hot Food Holding Cabinets | 10,625 | 10% |
| Commercial Refrigerators & Freezers | 104,170 | 44% |
| Commercial Steamers | 4,404 | 11% |
| Dehumidifiers | 1,800,949 | 92% |
| End-Use Products | 891,158 | N/A |
| Exit Signs | 1,954,725 | 50% |
| External Power Supplies | 15,315,731 | 4% |
| Furnaces | | |
| Residential Gas Furnaces | 1,319,905 | 37% |
| Residential Oil Furnace | Included in Gas Furnaces | 7% |
| Geothermal Heat Pumps | 32,517 | 1% |
| Light Commercial HVAC | 97,084 | 28% |
| Monitors | | |
| CRT | 5,986,832 | 100% |
| LCD | 18,733,033 | 58% |
| RLF | 10,523,682 | 5% |
| Indoor | 7,466,180 | 4% |
| Outdoor | 3,057,502 | 11% |
| Roof Products | | |
| Commercial | 1,402,671,462 square feet 22,972,506 gallons | 23% |
| Residential (square feet) | 242,995,441 | 5% |
| Room Air Cleaners | 208,583 | 13% |
| Telephony | | |

| Product Category | 2005 Units Shipped | 2005 Market Penetration |
|--|---------------------------|--------------------------------|
| Cordless Non-DSS Telephones | 1,714,976 | 7% |
| DSS Combination Units | 6,488,116 | 44% |
| Non-DSS Combination Units | 2,050,332 | 27% |
| Traffic Signals | 654,074 | 7% |
| Transformers | 64,686 | 24% |
| TV/VCR/DVD* | 14,512,041 | |
| TVs | N/A | 39% |
| VCRs | N/A | 28% |
| TV-VCRs | N/A | 55% |
| DVDs | N/A | 32% |
| Vending Machines | 68,581 | 28% |
| Ventilating Fans | 891,339 | 13% |
| Water Coolers | 726,361 | 68% |
| *Unit shipment data did not breakout for market penetration data categories. | | |