

**ENERGY STAR QUALIFIED PRODUCTS
NATIONAL MARKET SHARE
2003**

In 2001, the ENERGY STAR program began a transition to a standardized set of program requirements, which include a provision that partners submit ENERGY STAR qualified unit shipment data on an annual basis. 2002 was the first year for which this data was received, and it was collected for the subset of ENERGY STAR product categories that were first to transition to the new program requirements. In 2003, the process of collecting shipment data was repeated.

Estimated ENERGY STAR Market Penetration for 2003

Market penetration estimates are listed by product in Table 1. In most instances, shipment data for any given product category was received from a subset of participating manufacturers, but because of high response rates, this subset was considered representative of total ENERGY STAR qualified product shipments. Thus, unlike in 2002, no extrapolation from data received was made. Penetration estimates were then calculated using total U.S. product shipments (ENERGY STAR plus non-ENERGY STAR) obtained from other sources.

Unit Shipments

Table 2 presents reported ENERGY STAR qualified unit shipment, estimated total ENERGY STAR qualified unit shipments and total US shipments for each product category/subcategory. Sources of information on total US shipments varied depending on the product category and included Lawrence Berkeley National Lab, the Energy Information Administration, industry trade associations and private market research firms.

Table 1. Market Penetration by Product Category in 2003

Product Category	2003 Market Penetration (%)
Audio/DVD	59%
Boilers	
Residential Gas Boiler	31%
Residential Oil Boiler	75%
Ceiling Fans	
Ceiling Fan - Motors	19%
Ceiling Fan - Lighting	1%
Commercial Refrigerators & Freezers	
Refrigerators	9%
Freezers	48%
Dehumidifiers	
All	74%
L/day < 10	0%
10 < L/day < 25	76%
25 < L/day < 35	76%
36 < L/day < 57	12%
Exit Signs	91%
Geothermal Heat Pumps	35%
RLF	
Indoor	3%
Outdoor	7%
Torchieres	1%
Roof Products	
Commercial	6%
Residential	2%
Set-top Boxes	
Digital Cable Box	0.14%
Digital Converter	0.03%
Satellite Receiver	25%
Telephony	
Cordless Phones	86%
Answering Machines	67%
Traffic Signals	
12" Red Ball	44%
8" Red Ball	14%
12" Red Arrow	36%
12" Green Ball	47%
8" Green Ball	18%
12" Green Arrow	51%
Pedestrian Head - Combination Walking	
Man/Orange Hand	30%
Walking Man	1%
Orange Hand	3%
Transformers	6%
TV/VCR	
Televisions	47%
VCRs	93%
TV/VCR/DVD	74%
Ventilating Fans	
Rangehoods	0%
Bathroom and Utility Room Fans <80 cfm	15%
Bathroom and Utility Room Fans >80 cfm	12%
Total Bathroom and Utility Room Fans	13%
Water Coolers	
Cold Only/Cook and Cold	5%
Hot/Cold	60%

Table 2. Partners Reporting

<u>Product Category</u>	<u>2003 Response Rate (%)</u>	<u>2002 Response Rate (%)</u>	<u>Difference Between 2003 and 2002</u>
Audio/DVD	Not collected	Not collected	N/A
Boilers	79%	Not collected	N/A
Ceiling Fans	83%	Not collected	N/A
Commercial Refrigerators & Freezers	85%	78%	7%
Dehumidifiers	91%	67%	24%
Exit Signs	90%	74%	16%
Geothermal Heat Pumps	75%	71%	4%
RLF	84%	63%	21%
Roof Products	82%	57%	25%
Set-top Boxes	67%	50%	17%
Telephony	Not collected	Not collected	N/A
Traffic Signals	86%	78%	8%
Transformers	95%	Not collected	N/A
TV/VCR	Not collected	57%	N/A
Ventilating Fans	100%	100%	0%
Water Coolers	82%	50%	32%

Table 3. Unit Shipments

Product Category	Reported ENERGY STAR Shipments	Total Unit Shipments
Boilers*		
Gas	48,769	155,000
Oil	89,441	120,000
Ceiling Fans *	3,176,290	16,663,927
With lights	105,026	15,830,731
Commercial Refrigerators *	21,307	242,047
Commercial Freezers *	18,912	39,504
Dehumidifiers		
<10L/day	-	13,110
10-25 L/day	733,475	968,461
25-35 L/day	229,646	303,219
>35L/day	3,158	26,220
Exit Signs	3,502,318	3,831,496
Geothermal Heat Pumps *	13,631	39,456
Multi-function Set-top Boxes	5,777	3,912,000
Residential Light Fixtures		
Indoor	5,295,450	176,956,703
Outdoor	2,757,937	37,061,327
Torchieres	146,813	11,718,561
Roof Products *		
Commerical	951,240,778	14,849,000,000
Residential	77,574,426	4,363,000,000
Set-top Boxes		
Digital Converter	1,050	1,841,700
Digital Cable Box	5,235	3,782,530
Satellite Receiver	2,447,542	7,212,207
Traffic Signals *		
Red	213,884	5,764,251
Green	174,189	3,857,283
Transformers*	15,204	257,807
TVs, VCRs, combination units		
TVs	11,973,143	25,574,000
VCRs	5,835,809	6,271,000
TV/VCRs	3,398,811	4,621,000
Ventilating Fans		
Rangehood Fans	-	3,136,789
Bath & Utility Fans (<80 cfm)	158,150	1,078,375
Bath & Utility Fans (>80 cfm)	227,299	1,837,042
Water Coolers *		
Hot-Cold	344,197	569,008
Cold Only	19,768	379,339

* Adjusted for non-US shipments