Building Scale and Momentum in the Windows Market

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CLASSIFICATION LEVEL - PUBLIC
The Alliance
Accelerating Energy Efficiency

- Fill the Energy Efficiency Pipeline
- Accelerate Market Adoption
- Leverage the Power of the Region

Create greater scale with National Collaboration
Barriers to Address

- Price too high
- Consumer lack of awareness
- Builder / installer lack of awareness
- Fragmented program efforts
- Lack of product availability
- Lack of manufacturer business case for retooling and volume production
- Customer and builder concern about product cost, performance
Thin Triple Windows Today
Thin Triples Windows Market - Prime for MT Opportunity

- **Long measure life**, lost opportunity, high EE impacts
- Essential tool to reach decarbonization goals
- **Product is commercially available** with a few national players engaged and ready for mass production (with some help)
- With lighting savings waning, **utilities looking for new opportunities**
- Opportunity to **leverage production builders** through New Construction programs and code drivers
- Technology is **drop-in replacement for retrofit to reach larger savings opportunity**
- Opportunity to influence **ENERGY STAR spec**, (Canada is already there)
- Opportunity to **leverage existing national retailer** programs
- Opportunity to align large regions to ensure **greater engagement from manufacturers** (this is where the national collaborative is so necessary to get to scale.)
Has All the Elements of a MT Approach

- **Product available** from engaged manufacturers
- **A few large players** + 1 innovator that could have a large impact
- Market differentiation tool – **ENERGY STAR**
- **Existing programmatic channels to leverage**
- Opportunity for **utility incentives**
- **A clear benefits case** for owners, builders and eventually manufacturers
- **Code play** over time
- National attention to **aggregate scale and leverage** $
MT Strategies

- Stimulate scaled demand with production builders to try technology and demonstrate benefits
- Leverage national collaboration to create greater scale and impact
- Support manufacturers in move to scale production
- Push ENERGY STAR
- Help utility incentive and MT programs get off ground
- Leverage marketing channels to build awareness
- Retailer push
- Push code
- Rinse and repeat with lower U value technologies
MT End Goal

- TTWs are preferred option for existing building retrofits
- TTWs are business as usual in new construction
- Market share of U = 0.20
  - ENERGY STAR windows 50%+
- State Codes require U <= 0.20
- Windows reach 0.15 - Cut energy consumption by windows in 1/2
Lots of activity but... all over the map
Launch a National Collaborative

• Partnership for Advanced Window Solutions – PAWS
• Goal: Through collaborative research and programs, PAWS aims to aggregate market demand, reduce product cost, quantify benefits, accelerating the adoption of advanced windows and attachments
• Strategies:
  - Engage national PAW members to actively promote ENERGY STAR change to R5+
  - Promote R5+ window business case to volume builders across territories – aggregate demand
  - Engage manufactures to supply volume builders via pooled resources – share initial costs of retooling plants
  - Engage large utilities to provide incentives for .20 U windows – lower cost to consumers and build awareness
  - Build on existing campaigns to build awareness through marketing partnerships between manufacturers, utilities and others
Who is Organizing PAWS?
Partners

- Leading Manufacturers
- Public interest agencies
- Efficiency advocates
- Government entities - state, national
- Utilities
- Research Organizations
- Standards and Rating Organizations
Align Pieces of the Puzzle Across Activities

- National Rating, Codes and Certifications
- Campaigns and Initiatives
- Incentives, Rebates, and Tax Credits
- Regional Programs and Investments
- Utility Program Collaboration
- Data & Tools