

Customer Trends and Profiles

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Marketplace

Verification and Logo Use for Renewable Energy Purchasers

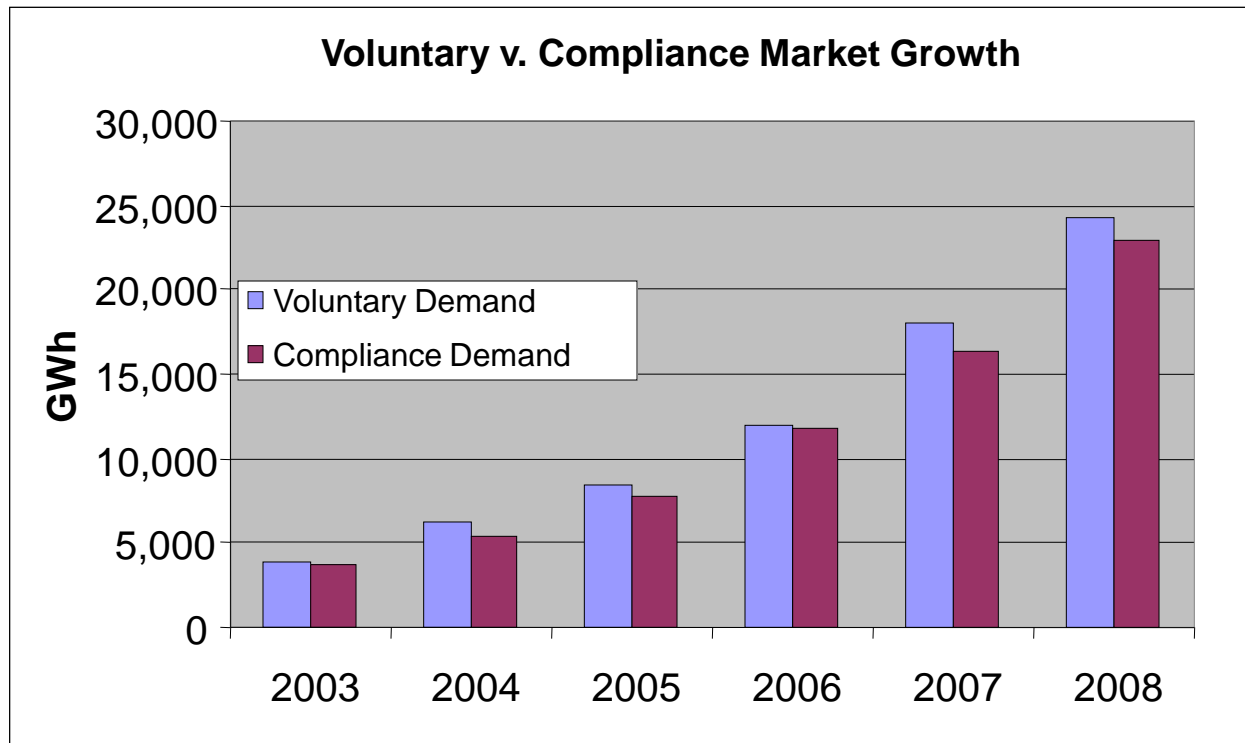
- Allows use of Green-e logo to promote purchase
 - Minimum purchase or generation requirements
 - Fee to use trademarked logo
 - Verification of purchases and percent of use claims
- Logo can be used on consumer goods manufactured with 100% renewable energy
- Helps demonstrate environmental commitment and use of renewable energy



Consumer Trends and Profiles: Presentation Roadmap

- Growth of the market
- Who are the major customers?
- What are some of the major drivers?

Overview: Is the voluntary market important? Yes!!!



Lori Bird, et al., "Green Power Marketing in the United States: A Status Report (11th Edition). Technical Report NREL/TP-6A2-44094. October 2008. 2008 data are preliminary. Claire Kreycik, National Renewable Energy Laboratory, July 2009.

Growth of Overall Voluntary Purchases

U.S. Renewable Energy Purchases by Customer Type				
Year	2005	2006	2007	2008
Residential (GWh)	3,000	3,200	4,500	5,600
Nonresidential (GWh)	5,500	8,700	13,600	18,600
Total (GWh)	8,500	11,900	18,100	24,200
% Nonresidential	65%	73%	75%	77%

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Top 20 U.S. Green Power Purchasers

1. Intel Corporation
2. PepsiCo
3. Whole Foods Market
4. Kohl's Department Stores
5. Dell Inc.
6. City of Houston, TX
7. U.S. Air Force
8. The Pepsi Bottling Group, Inc.
9. Cisco Systems, Inc.
10. Commonwealth of Pennsylvania
11. Johnson & Johnson
12. City of Dallas, TX
13. HSBC North America
14. U.S. Environmental Protection Agency
15. Wal-Mart Stores - CA and TX Facilities
16. City of Chicago, IL
17. Starbucks
18. Kimberly-Clark Corporation
19. University of Pennsylvania
20. U.S. Department of Energy

EPA, "Green Power Partner Top 50," <http://www.epa.gov/grnpower/toplists/top50.htm>.

Major Drivers of Growth

- Consumer-driven demand
- Growth of green pricing programs
- Recognition and certification programs
 - LEED
 - EPA Green Power Partners
 - EPA Climate Leaders
 - Green-e Marketplace
 - Green Seal
- Price

Important Factors in Purchasing

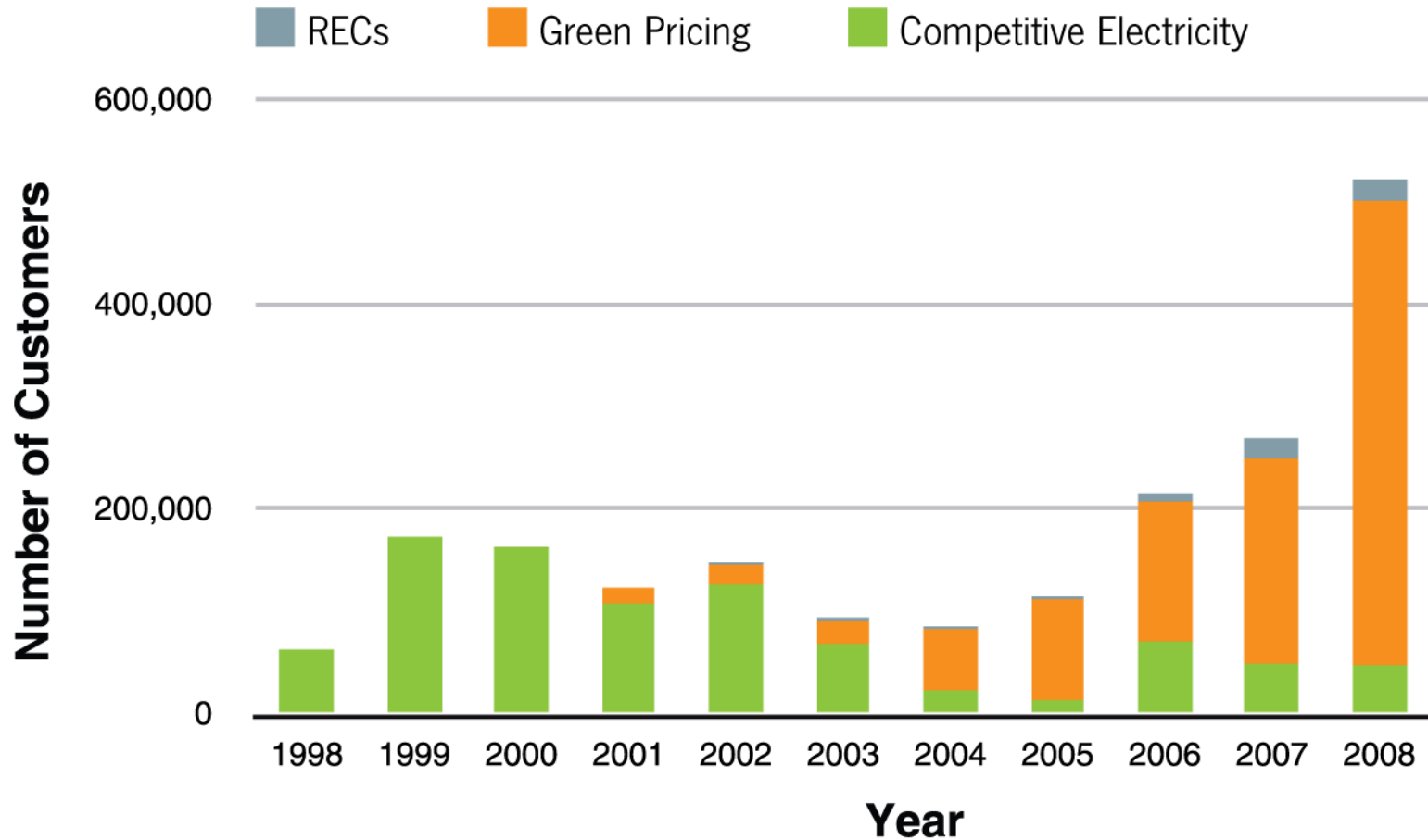
- Product Choice
 - RECs vs. Green Pricing Program
- Length of Contract
- Location of Generation
- Price
- Resource Type
- Certification

Growth in Certified Purchases

Green-e Energy Commercial Sales vs. Total Voluntary Commercial Sales				
Year	2005	2006	2007	2008
Green-e Energy Certified Commercial Sales (GWh)	1,852	3,900	7,922	11,412
Total Voluntary Commercial Sales (GWh)	5,500	8,700	13,600	18,600
% Green-e Energy Certified (commercial)	34%	45%	58%	61%

Product Type

Retail Customers Purchasing Green-e Energy by Product Type, 1998–2008



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