

2013

# Virginia Energy Efficiency INDUSTRY CENSUS



## Key 2013 Findings

### 1,334 Energy Efficiency Companies

Estimated from VAEEC research on energy efficiency companies across Virginia.

### + \$438 million Annual Revenue

Estimated from the 318 companies that responded to the census of which 291 reported activity in energy efficiency sector and 27 report only activity in the renewable energy sector.

This does not include the revenue of the over 1,000 companies that did not respond to the census. The actual energy efficiency industry revenue could be two to three times higher.

### 9,400 Energy Efficiency Jobs

Estimated based on reported energy efficiency jobs (4,241) from the 291 reporting companies.

### Top Three Policy Needs

- **Green/Energy Efficiency Programs**
- **Performance Based Incentives**
- **Rebates**

## Defining Energy Efficiency Companies

# Energy Efficiency Work Categories

Residential and commercial heating and cooling (HVAC)

Building automation controls

Weatherization

Smart grid/AMI

Green architecture

Manufacturing-energy star building supplies

Energy management software

Distributor of energy efficiency products

Residential and commercial energy and assessments

Insulation

Energy performance contracting

Geothermal

Green Home building

Manufacturing of heating and cooling equipment

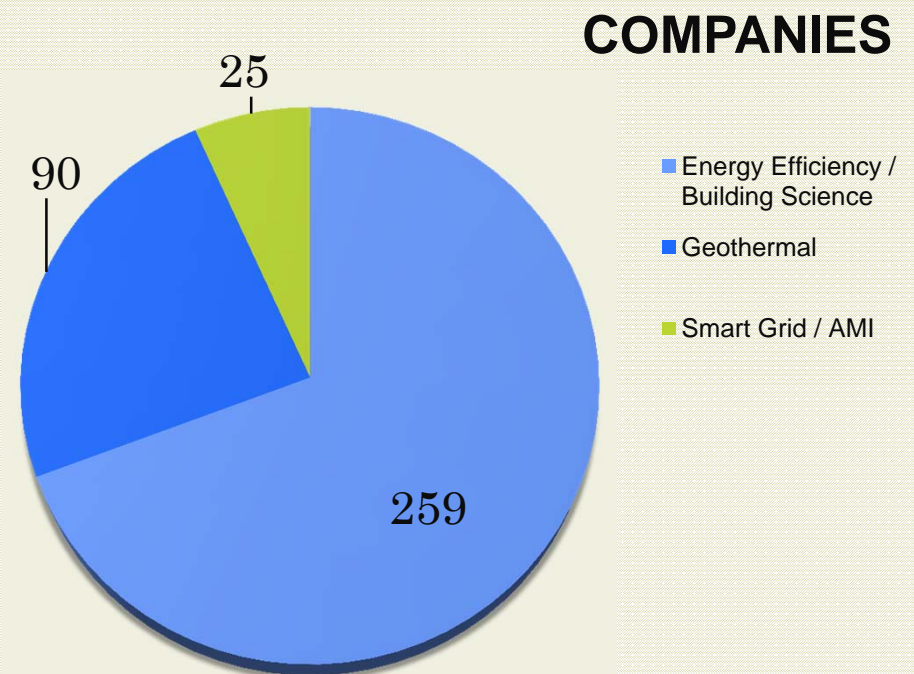
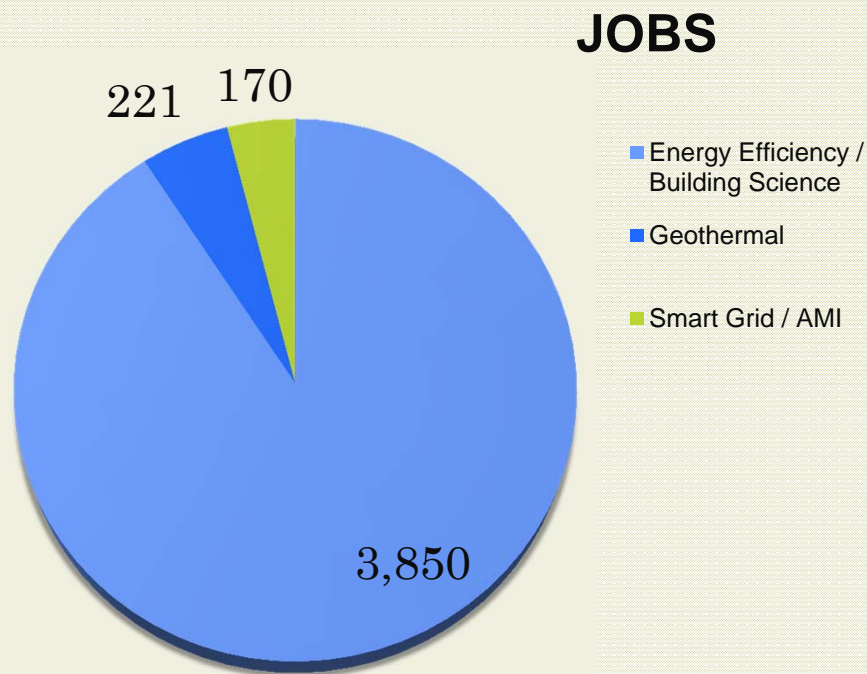
Energy efficiency consulting

# Summary of Four State Southeast Clean Energy Industries Data

## The VAEEC energy efficiency census report is part of a 2013 four state Southeast Clean Energy Industries Census

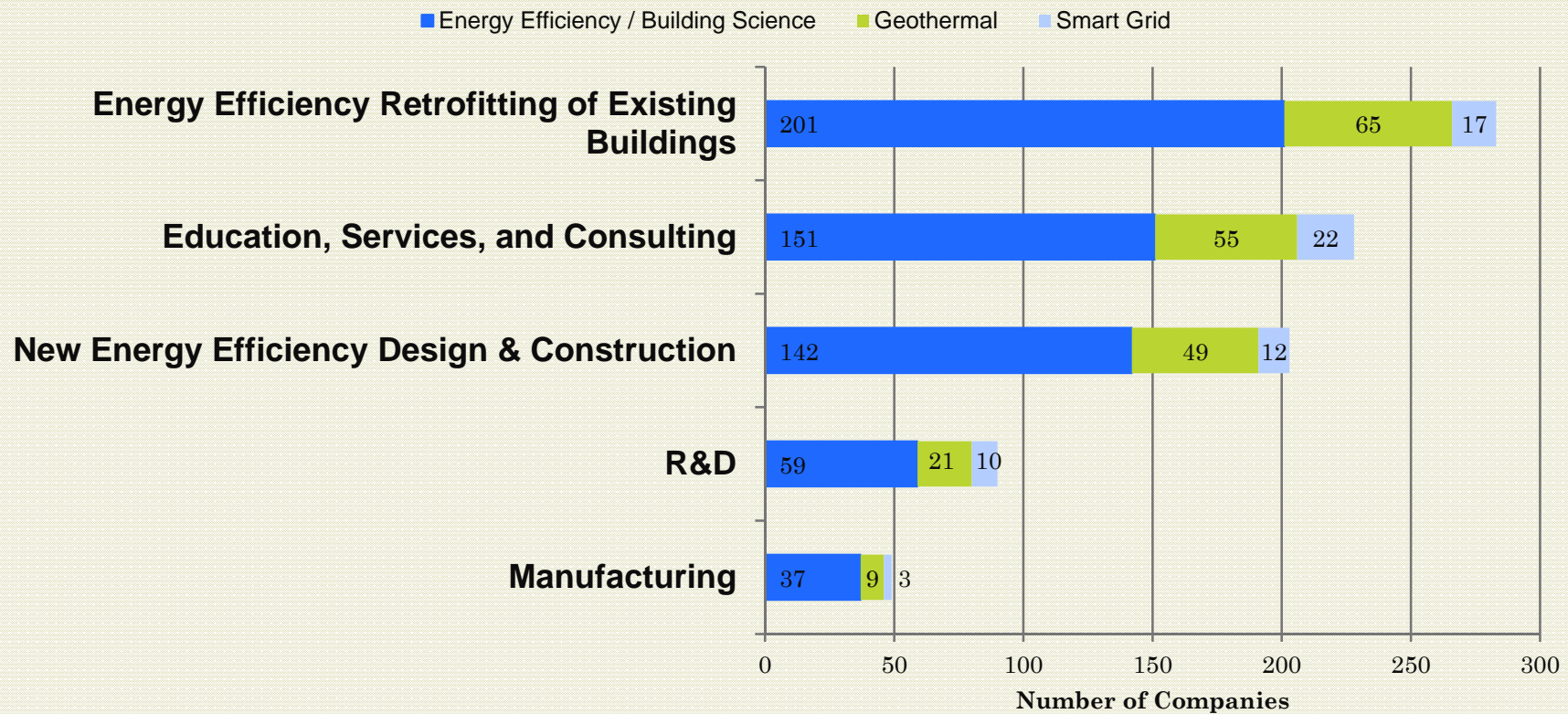
	Number of Responding Clean Energy Organizations	Proportion by Organization	Total Clean Energy FTEs	Proportion by FTE	Clean Energy Revenue
Georgia	381	26%	9,712	25%	\$2,609,977,711
North Carolina	570	38%	18,404	47%	\$3,586,876,655
South Carolina	220	15%	5,977	15%	\$836,056,656
Virginia	318	21%	5,383	14%	\$438,821,375

# Virginia's Energy Efficiency Sector Employment and Companies by Business Focus



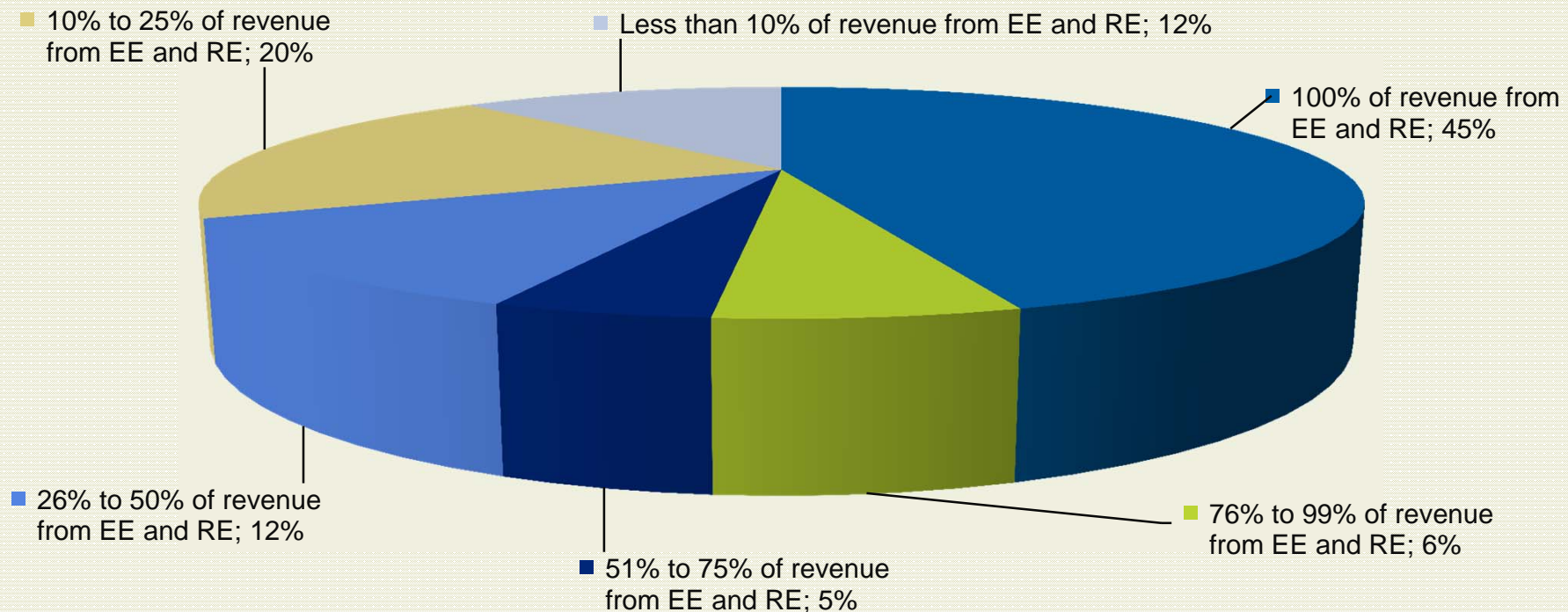
**More than 70% of the energy efficiency jobs in Virginia are in the energy efficiency/building science focus area**

# Virginia's Energy Efficiency Sector by Business Activity



**Primary business activities include providing energy efficiency retrofits to existing building retrofitting, education, services or consulting and new construction**

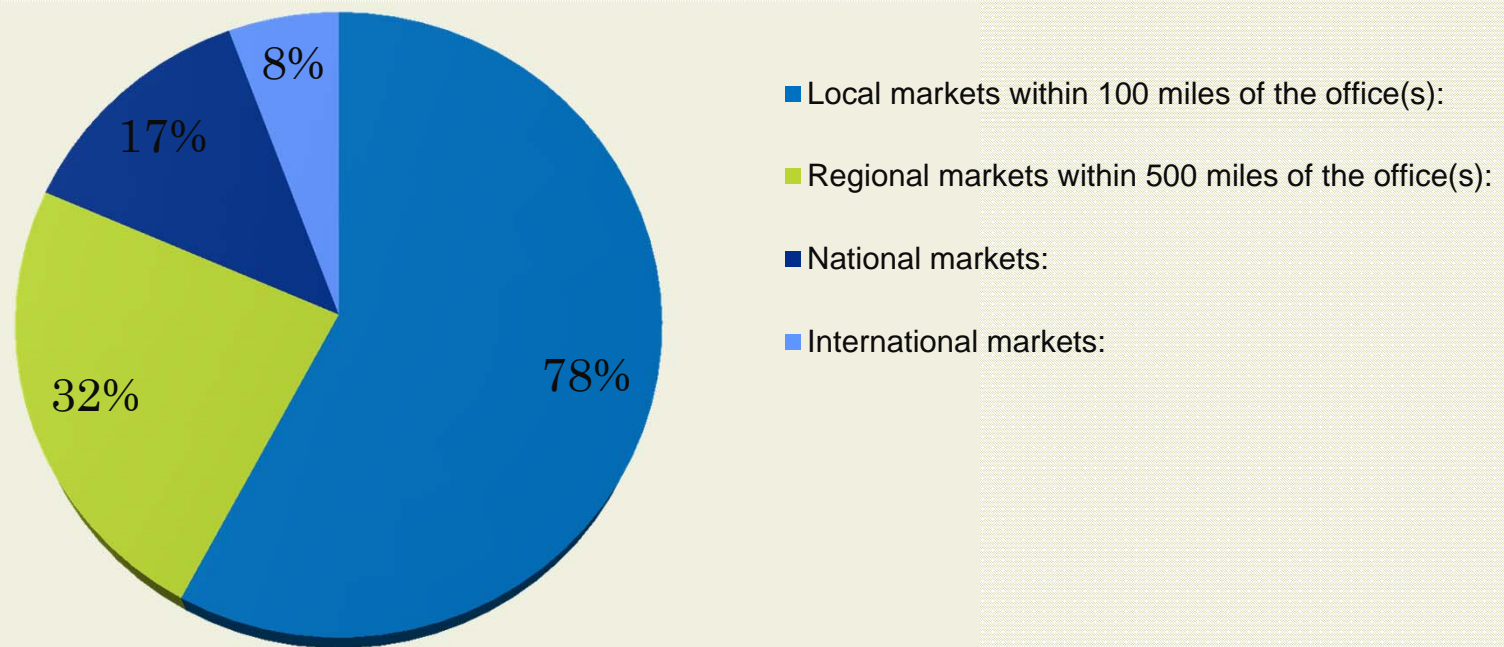
# Sources of Revenue for Virginia's Energy Efficiency and Renewable Energy Companies



**More than half of Virginia's energy efficiency and renewable energy businesses obtain 75% or greater of their income from these sectors**

# Distribution of Products and Services by Geographic Markets Served

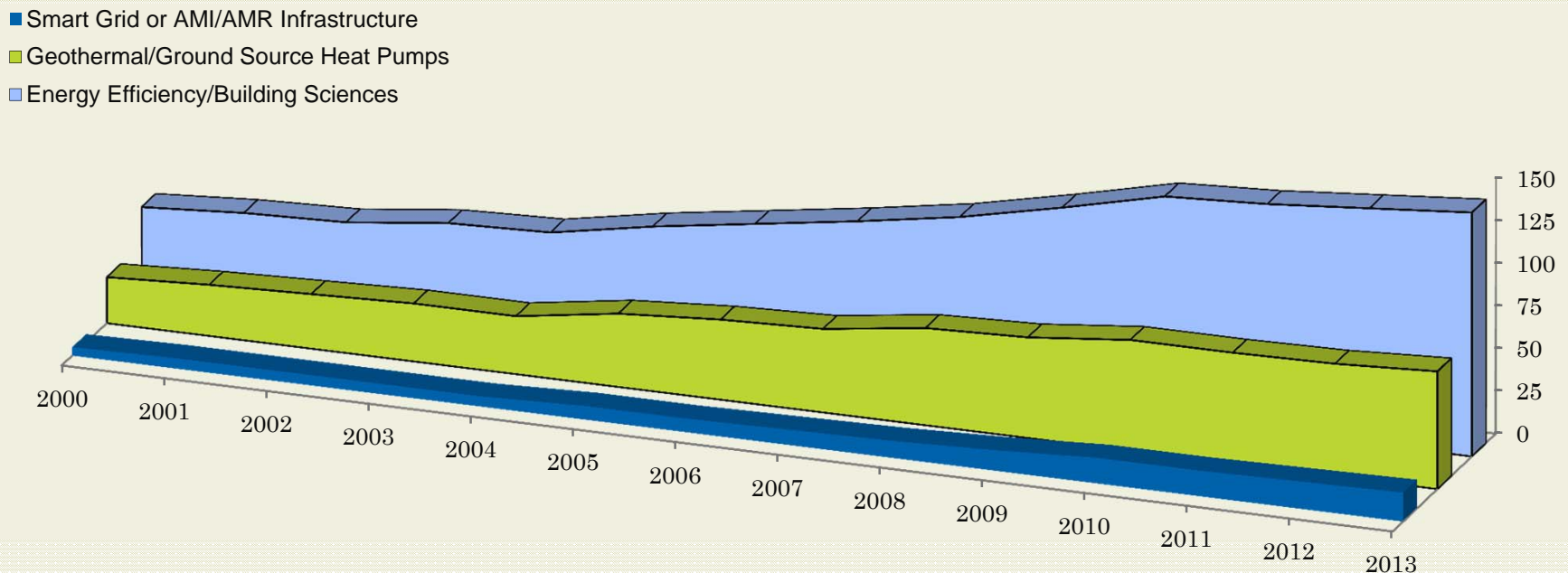
## PERCENT OF TOTAL COMPANIES IN ENERGY EFFICIENCY / BUILDING SCIENCES SECTOR



**78% of the energy efficiency / building sciences companies serve the local market within 100 miles of their business location.**

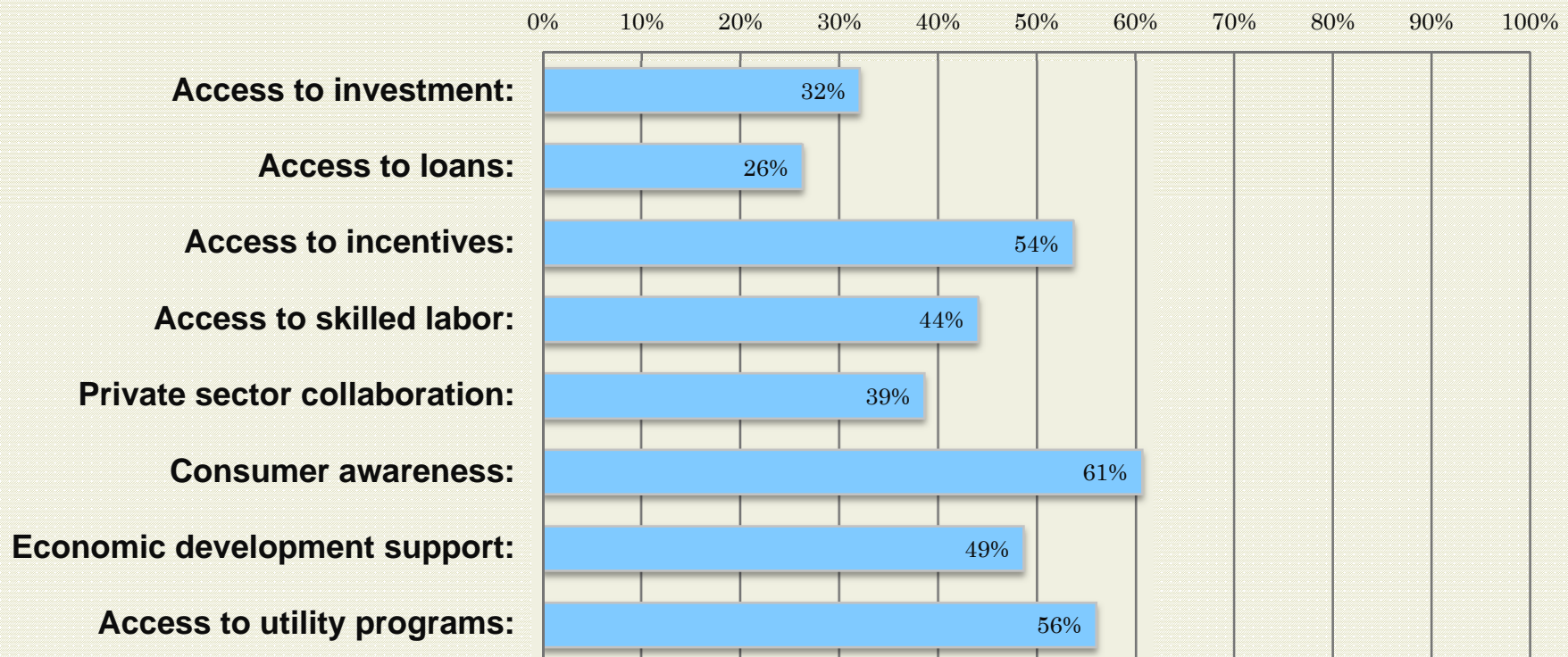


# Growth of Energy Efficiency Industry by Business Focus



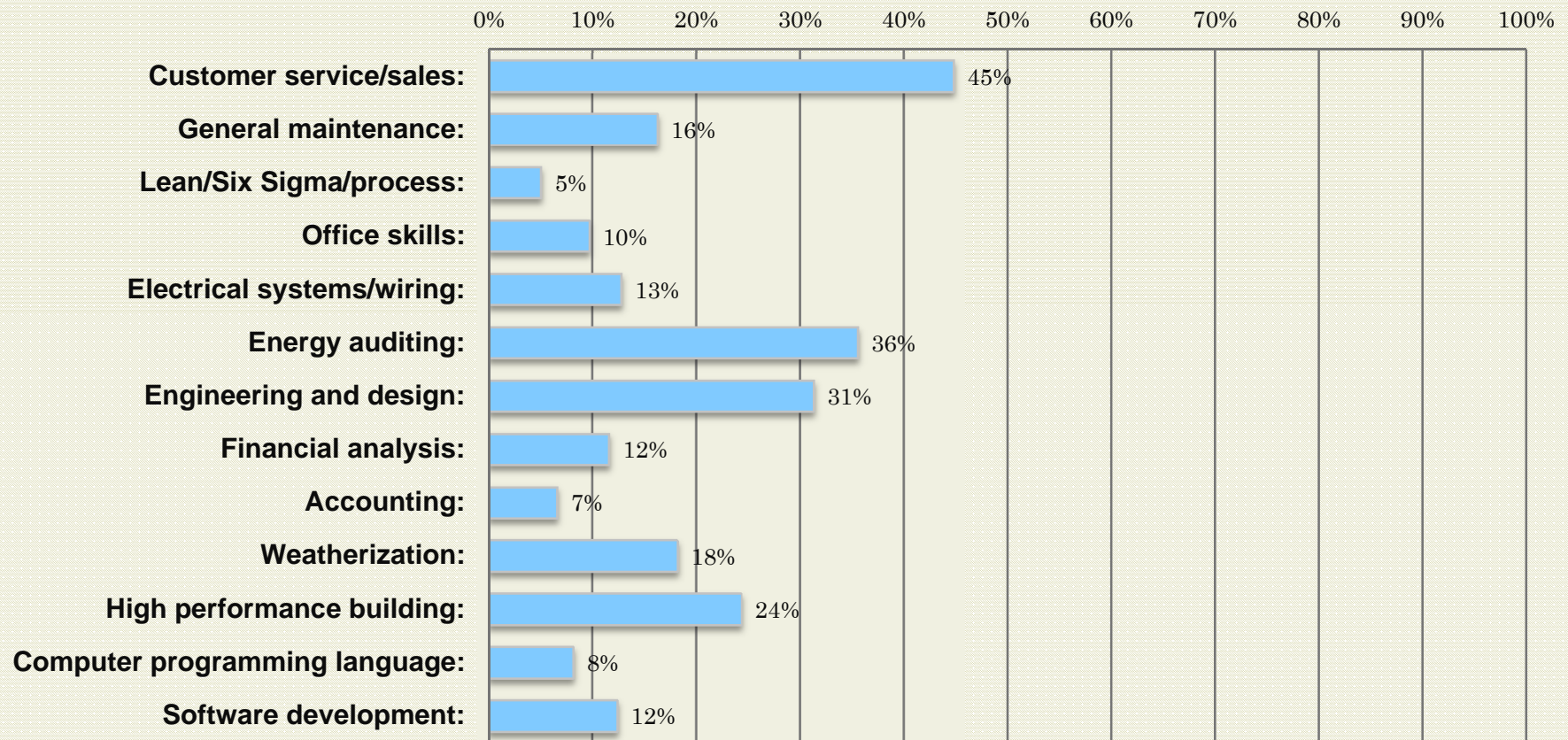
**The number of companies serving the energy efficiency/building science sector has grown 191% from 43 to 149 from 2000 to 2013.**

# Factors Considered When Adding Energy Efficiency Jobs



**Consumer awareness and access to incentives were the two most common needs for adding energy efficiency jobs**

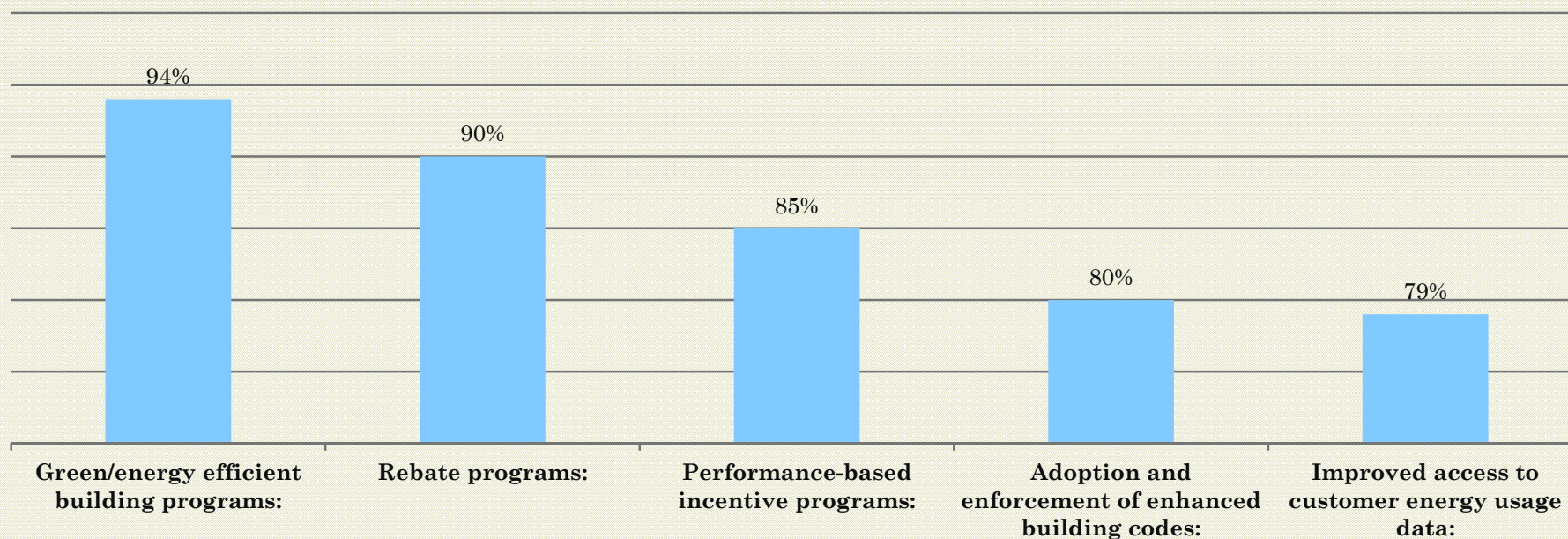
# Job Skills Gaps



**Customer service/sales, energy auditing and engineering and design were the leading skill gaps**

# Top Policy Needs

Percent of All Respondents Replying "Very or Somewhat Important"



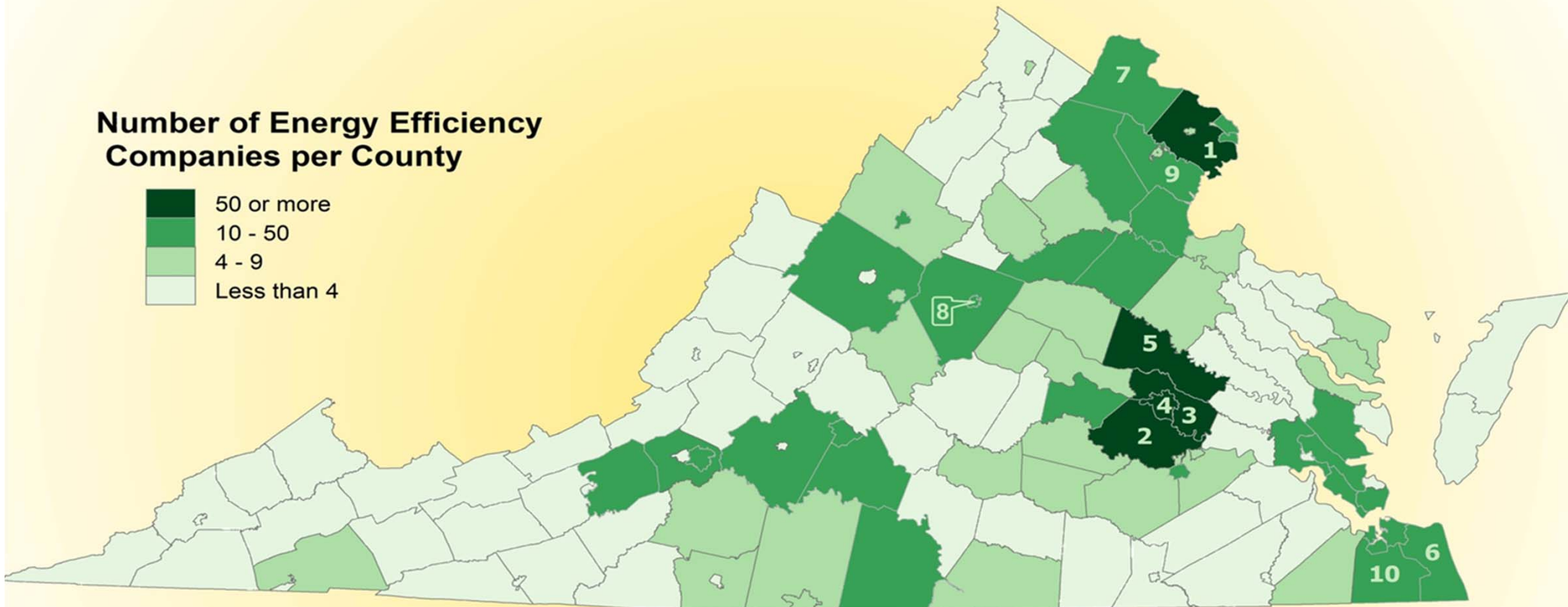
Virginia's energy efficiency businesses identified the need for:

- green / energy efficiency programs
- performance based incentives
- rebates as the top policy needs

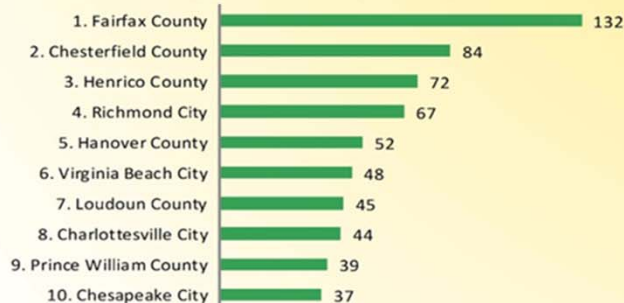
# Geographic Disruption of Energy Efficiency Companies

## Virginia's Energy Efficiency Companies

Number of Energy Efficiency Companies per County



Top Ten Counties by Number of Energy Efficiency Companies



VAEEC has identified over 1,300 companies that are currently conducting business in Virginia's energy efficiency sector.



**About the Virginia Energy Efficiency Council:**

*Founded in 2012, the Virginia Energy Efficiency Council seeks to assess and support programs, innovation, best practices and policies which grow Virginia's energy efficiency industry and to provide a forum for stakeholder interaction.*