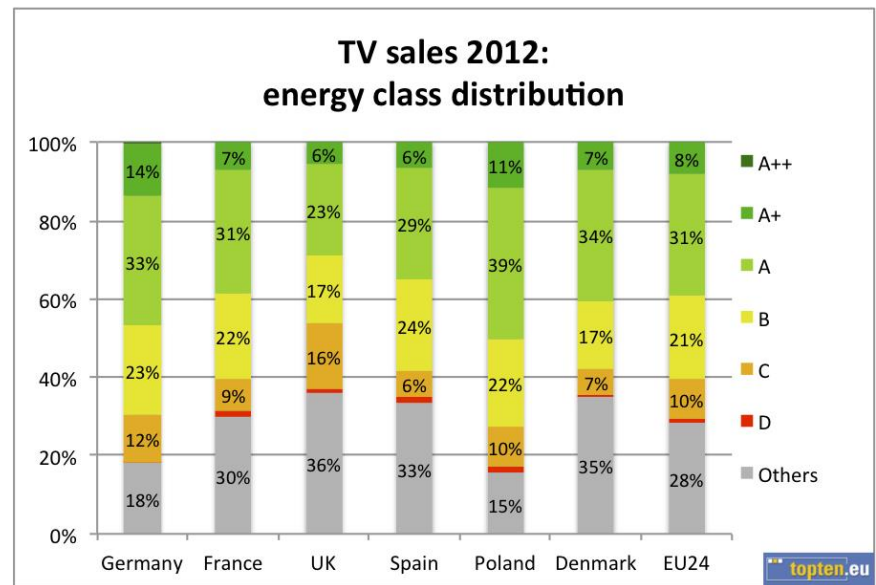


Systematic market monitoring: a pilot project on TVs demonstrates the value for policy design

Sophie Attali, Anette Michel,
Eric Bush

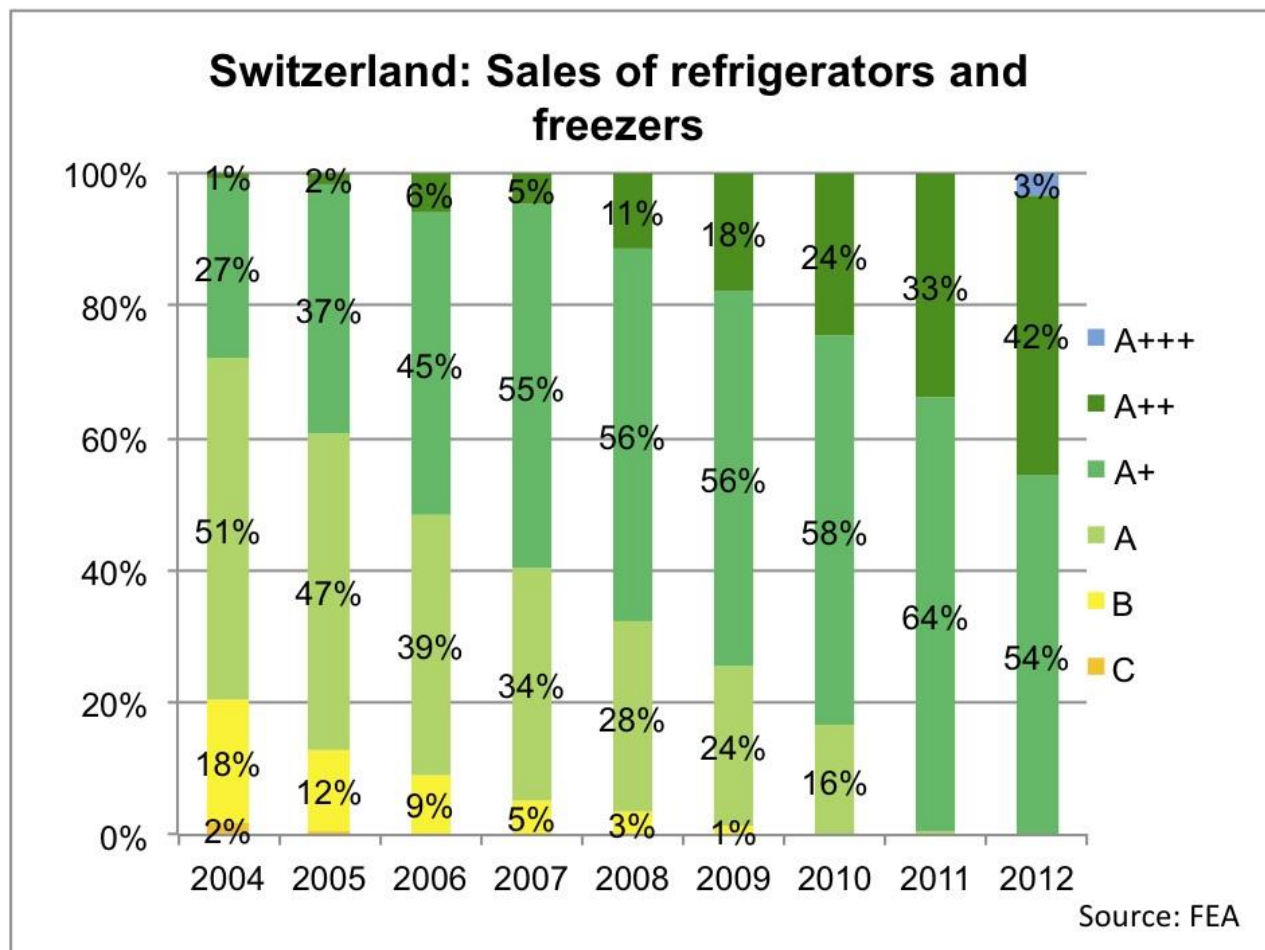
Topten International Services



EEDAL 2013

12 September 2013, Coimbra, Portugal

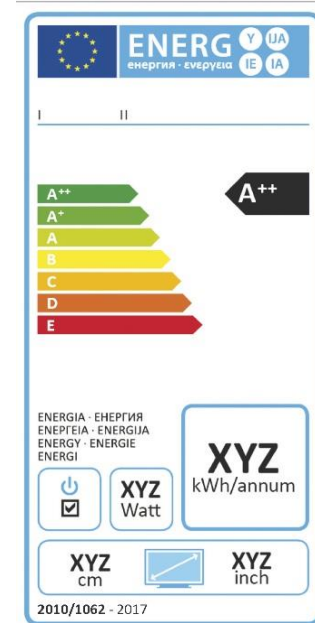
Market monitoring: definition for our paper



Description of the market – NOT compliance verification

Regular market analysis would bring a lot to the EU policy process

- Support policy design decisions
 - MEPS
 - Label thresholds
- Support policy evaluation
- Good timing for policy revisions
- Long-term: Support stock information, base line for scenarios and models



Today decisions are often taken based on partial / outdated data, which is not comparable. Sound data does exist and does not cost a lot!

- **Our pilot on TVs demonstrates the value**

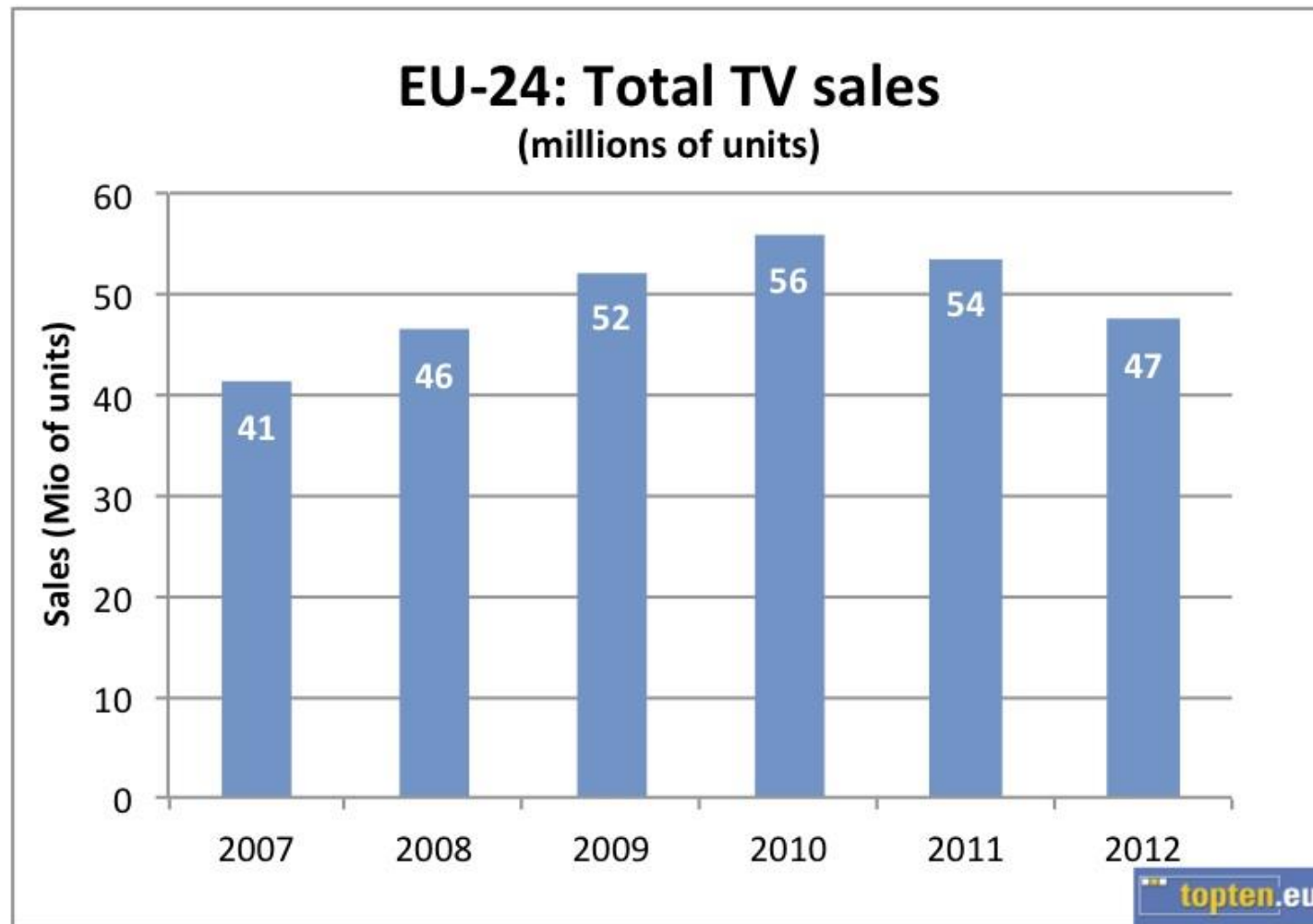
Policy on TVs and CSES evaluation

- Preparatory study finalised in 2007, market data from 2004 (before the shift from CRT to LCD TVs)
- Ecodesign regulation adopted in 2009, On mode power requirement applied from Aug 2010 (tier 1) / Apr 2012 (tier 2)

Ecodesign Directive evaluation study (CSES, 2012):

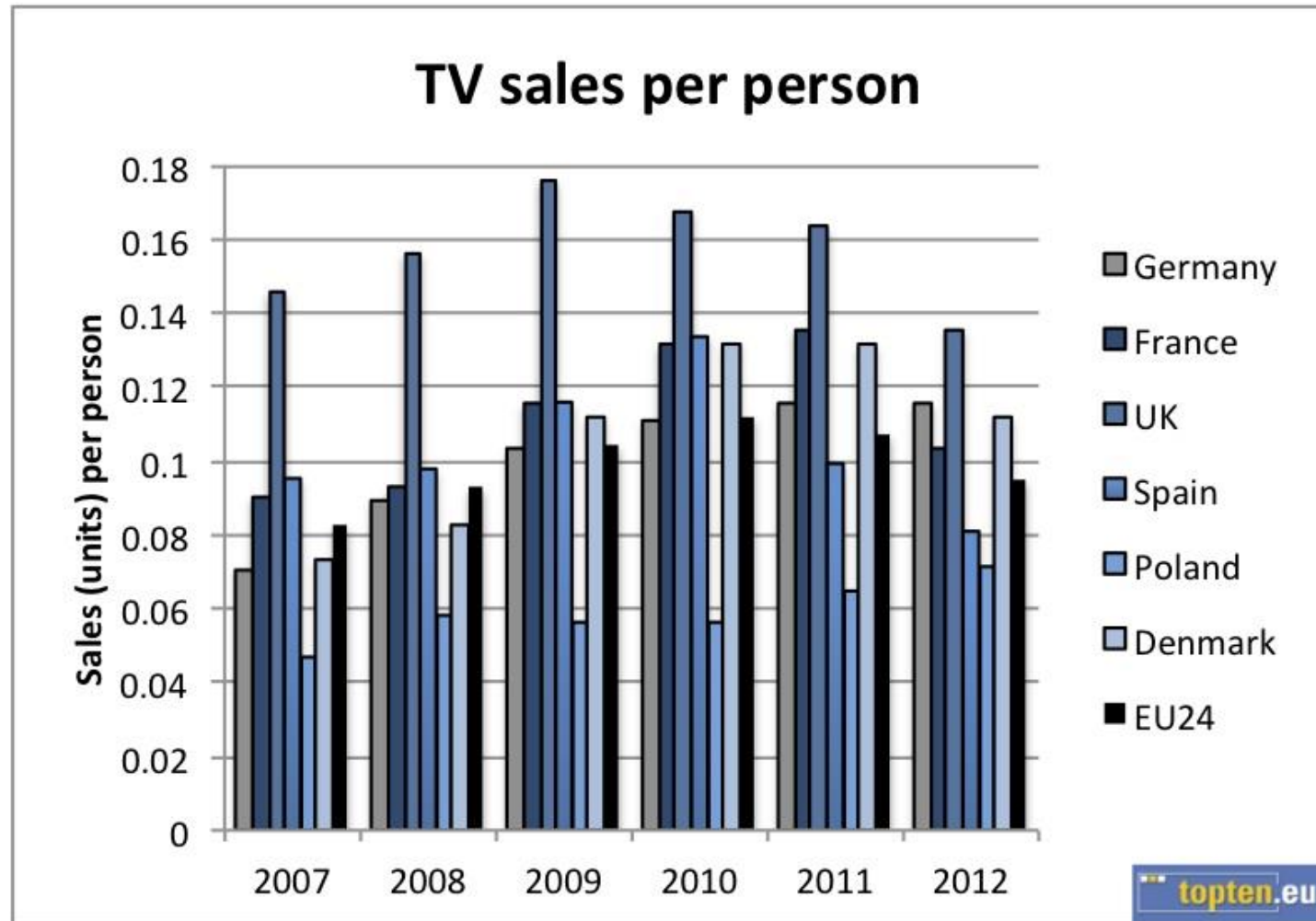
- *“Most products already met the 2012 requirements in 2010 (...) The direct effects of the Ecodesign requirements appear relatively limited”*
- *“More ambitious requirements could have been introduced”*
- *“A key reason for not setting such requirements was the absence of up-to-date information on market developments”*

Results: Sales peak in 2010



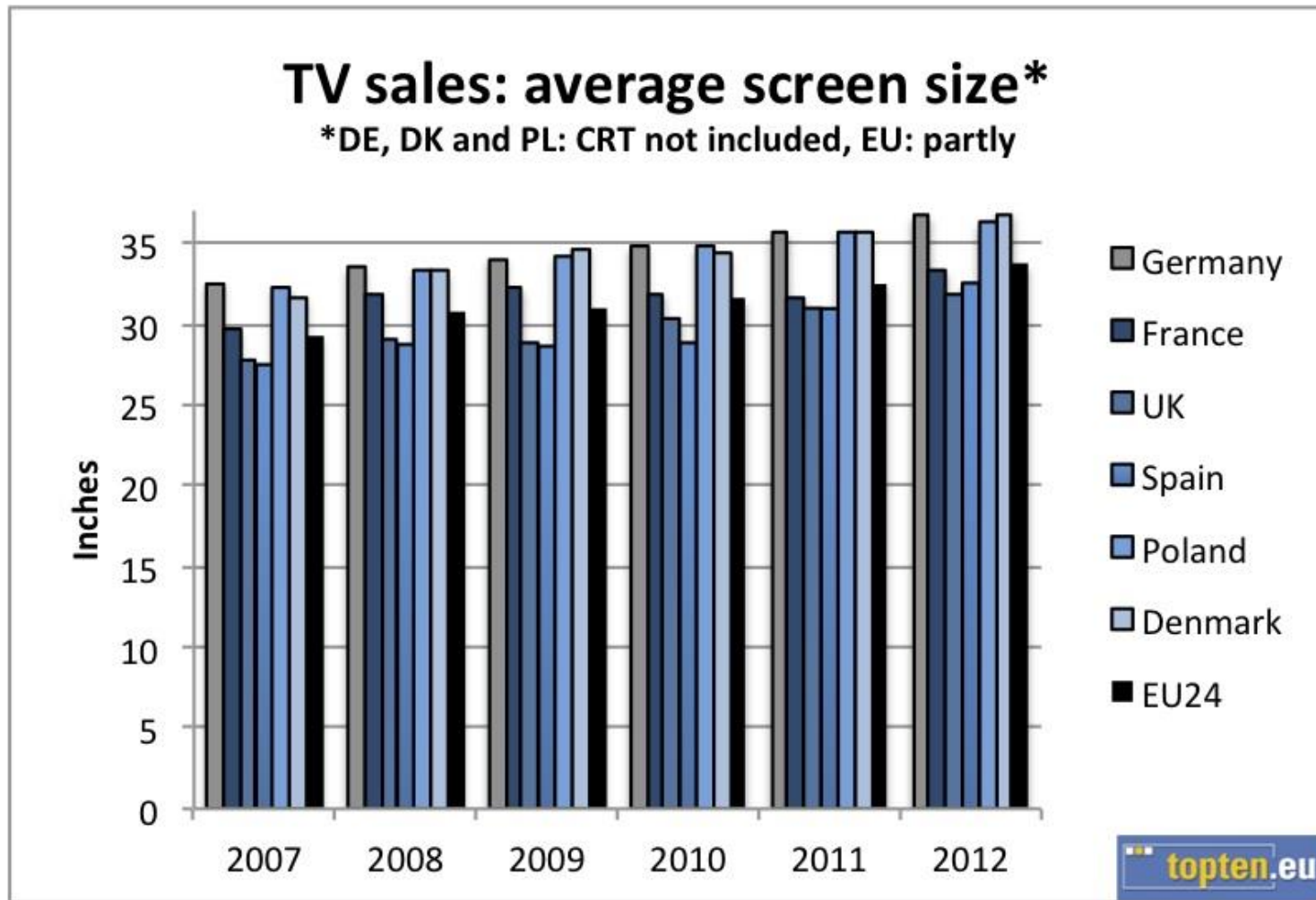
Data source: GfK

Sales per capita differ between countries



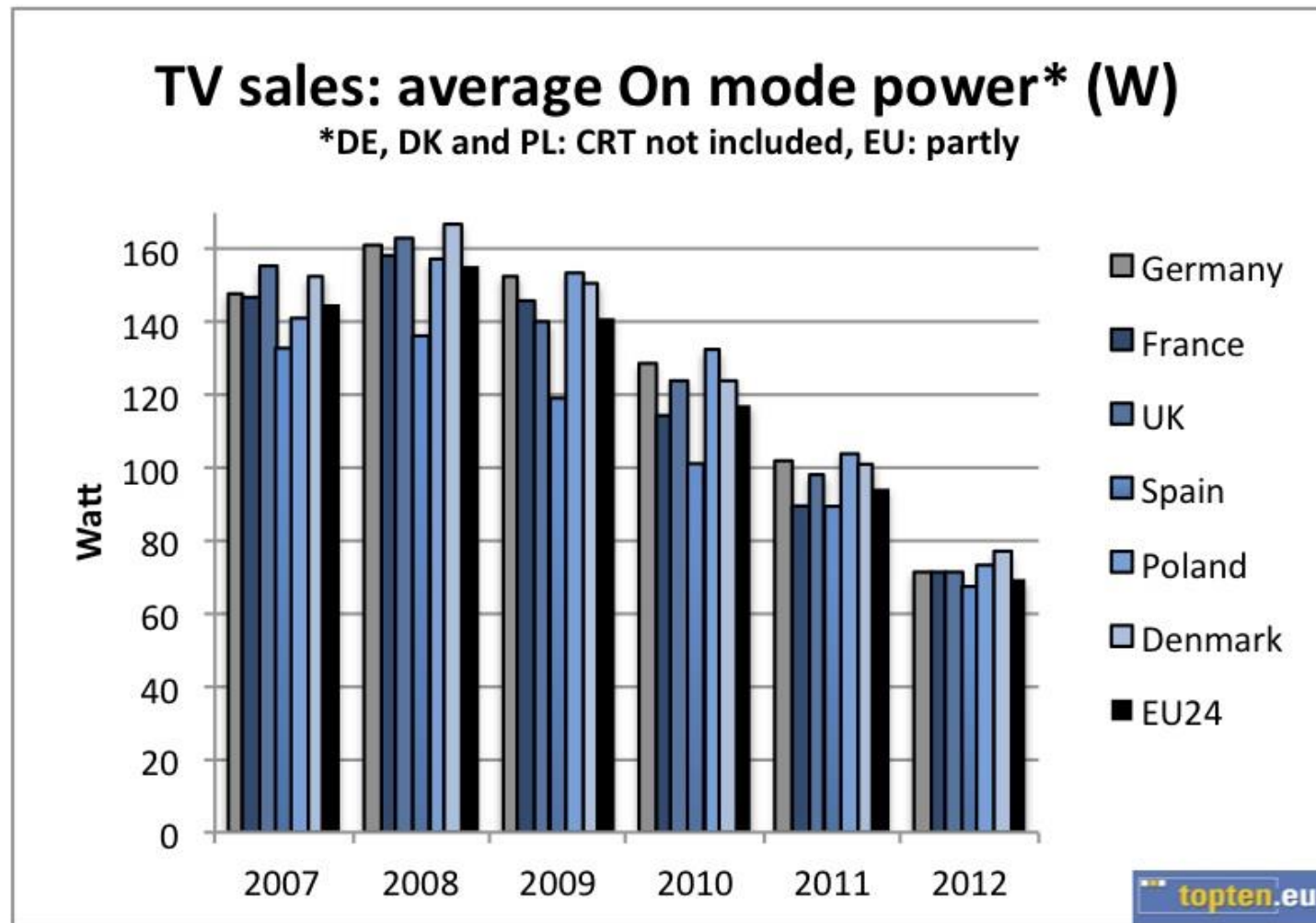
Data source: GfK

Increasing screen size



Data source: GfK

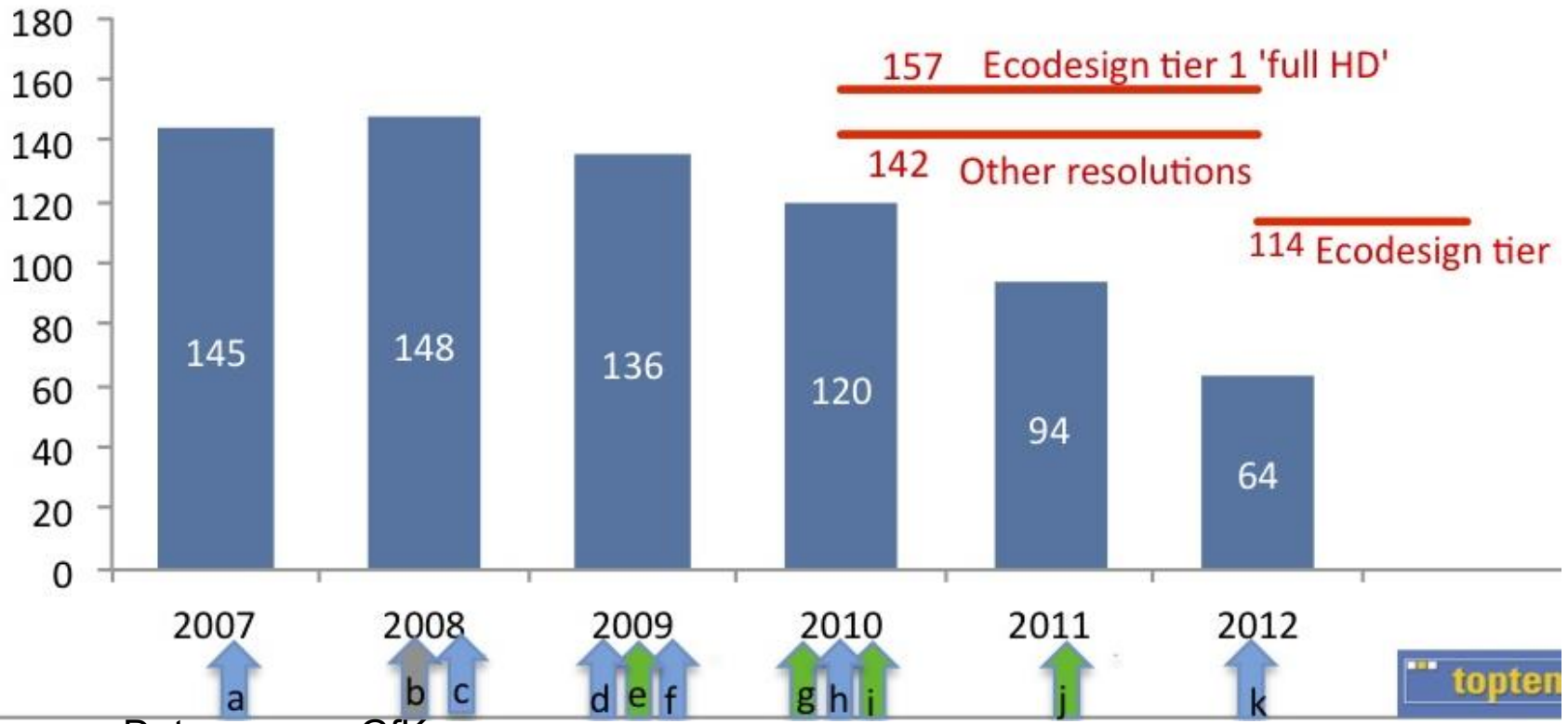
Decreasing power in On mode



Data source: GfK

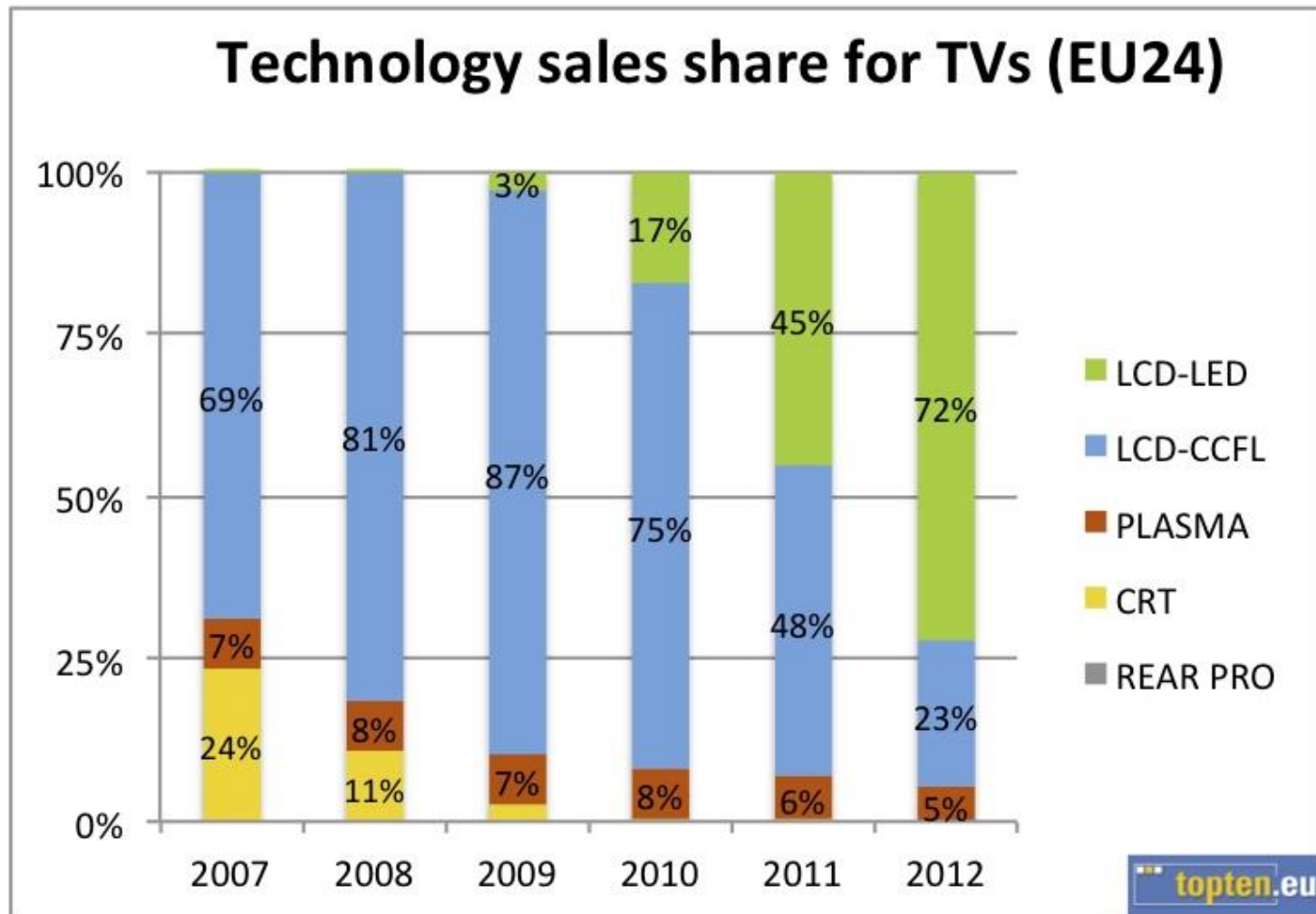
Ecodesign levels were too high

EU-24: average On mode power and Ecodesign requirements for 32" TVs



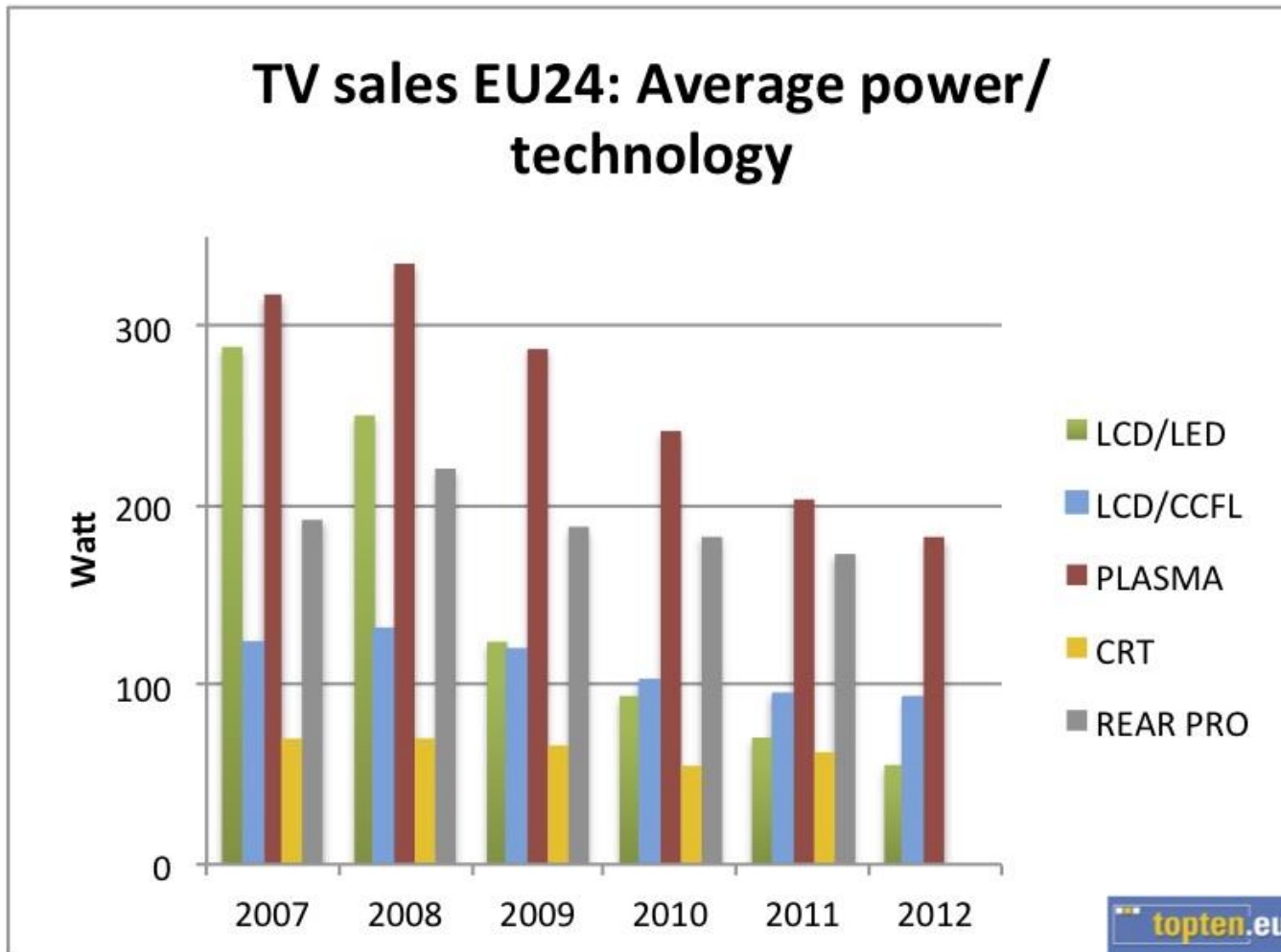
Data source: GfK

Two technology shifts



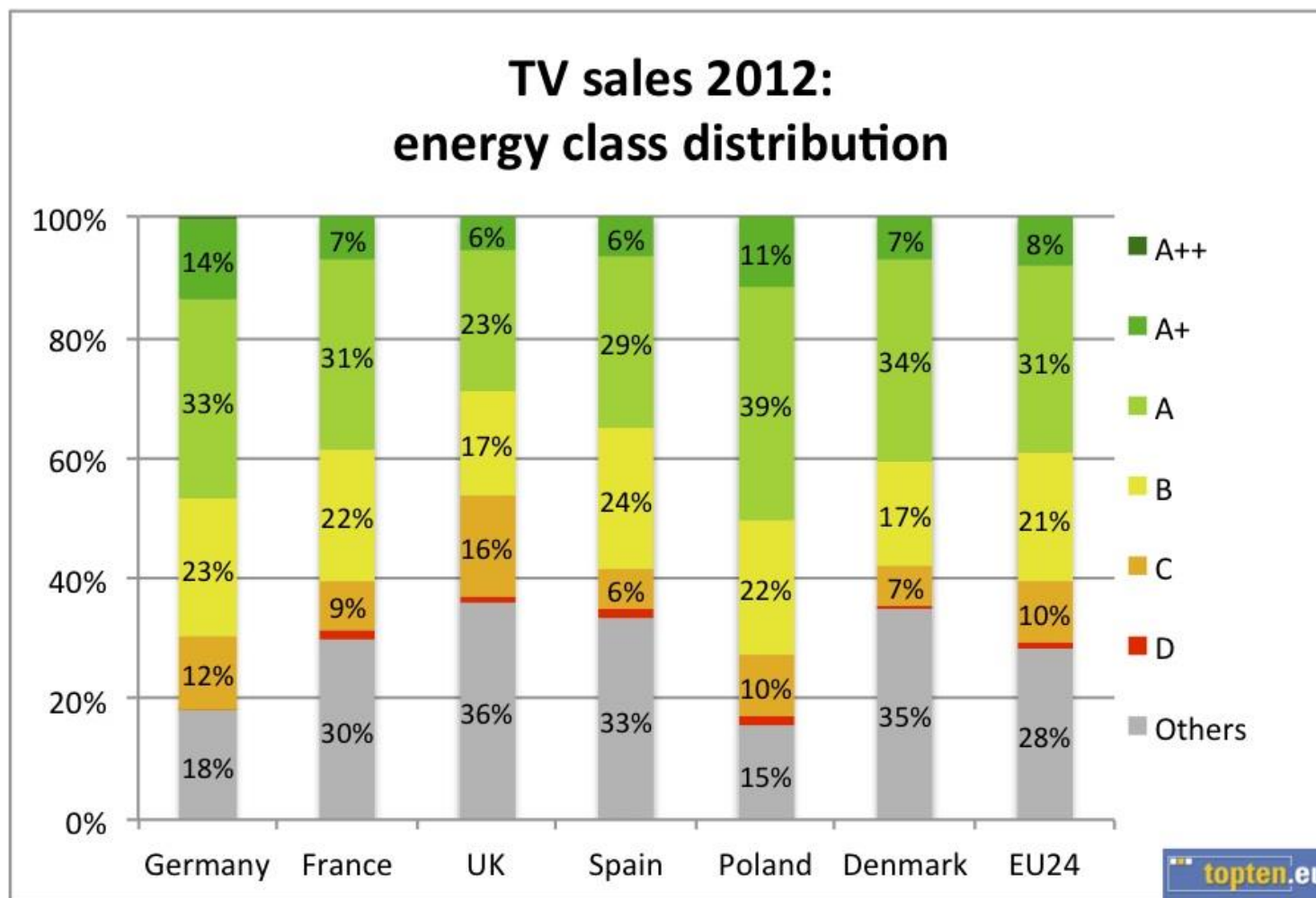
Data source: GfK

Average power of technologies



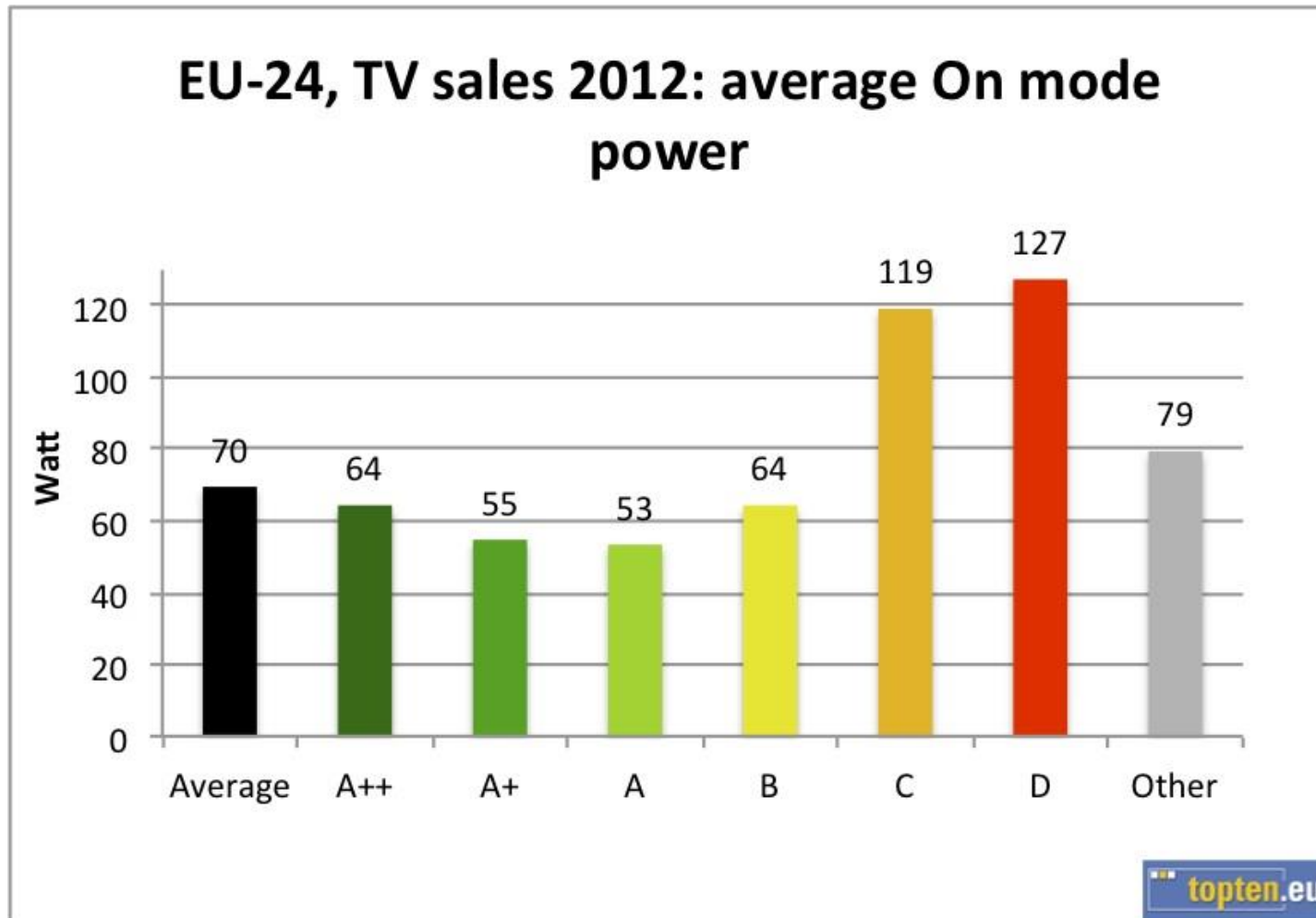
Data source: GfK

Energy Label: in 2012 39% were class A and better



Data source: GfK

Class A has lowest power



Data source: GfK

Conclusions – recommendations for revision

The revised regulations for displays (incl. monitors) are expected for adoption before the end of the year.

→ Revise the EEI calculation formula so that **large TVs are no longer favoured**. For both the **Ecodesign requirements and the Energy Label!**

→ **New, ambitious Ecodesign tiers:** class A from 2015, followed by A+

→ The labelling scale is still active with an empty top class and four ‘active’ classes. Fast development! In the future **class A** should stand for the best.

Conclusions: Market monitoring summary

This market monitoring allows us to

- **evaluate** the effect of **Ecodesign** requirements,
- see if the **Label** should be revised,
- see **market trends** and make predictions for future,
- derive conclusions for **appropriate policy design**,

→ Very useful not only for TVs, but for all Energy related Products.

- Precondition: measurement standard,
- very helpful: Energy Label

Conclusion: what Europe needs

Systematic market monitoring:

- Based on **sound data** that can be compared over time and between countries: recent, exhaustive data
- Aggregated data is sufficient
- Including **sales** information
- Yearly publication of a report – **public basic facts**
- **The data is there and does not cost a fortune:** professional market research companies have it

Longer term: mandatory product registration – also facilitates compliance verification