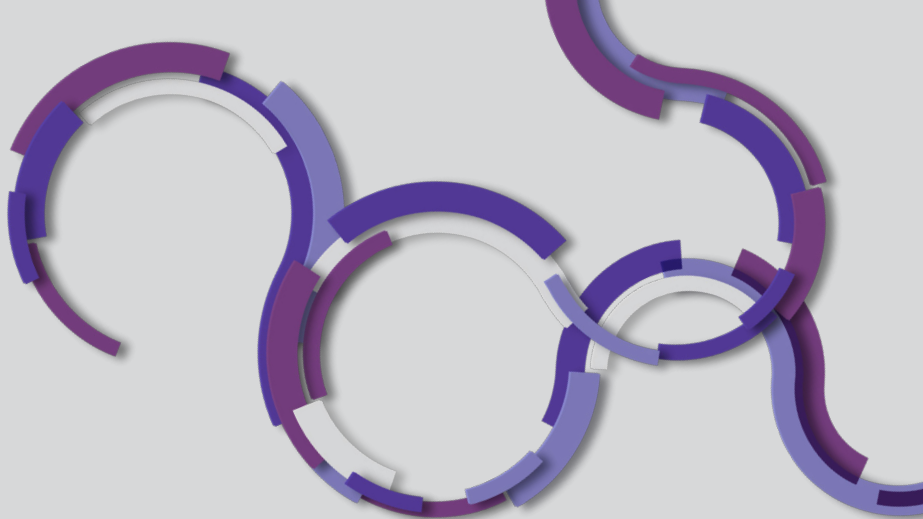


# Energy Insights

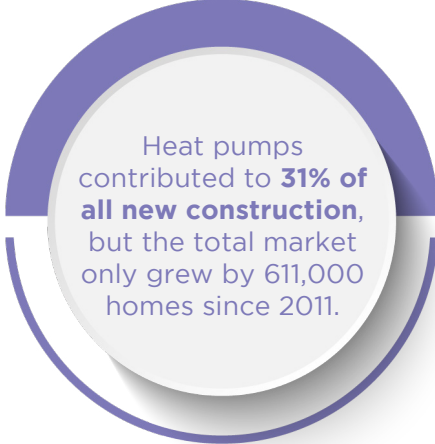


## New Construction vs. New Market Share Growth

- Based on US Census Bureau surveys, between 2011 and 2019, 7.26 million more households were added to the total housing market. 8.39 million new homes were completed during that same time frame suggesting a possible 1.13 million homes were retired since 2011.
- Natural gas space heating grew by 2.35 million households since 2011. 4.36 million new homes were built with gas space heating and contributed to 52% of all new homes built since 2011.
- Heat pumps were installed in 2.64 million homes since 2011, or 31% of all new construction. The total number of households with heat pumps only grew by 611,000 since 2011.
- While gas furnaces and heat pumps had high new construction numbers, because the net change in total households is lower than the number of new housing starts, some customers may have converted to other types of equipment or retired their homes.
- Only 400,000 homes were built with an electric furnace for space heating or 4.7 percent of all new homes. Meanwhile, over 10.8 million converted to that form of heat. For every 1 new net gain in heat pumps, 18 more electric resistance units were added since 2011.



More than 4 million new homes, or **52% of all new construction** were built with a gas furnace.



Heat pumps contributed to **31% of all new construction**, but the total market only grew by 611,000 homes since 2011.



For every heat pump added to the market since 2011, **4 more gas furnaces and 18 more resistance furnaces** were installed.

# Number of Households with Gas or Electric Space Heating Between 2011 - 2019

Occupied and Non-occupied Housing Types	2011	2019	Net Change 2011-2019	New Construction 2011-2019
All Households	132,428,266	139,684,244	7,255,978	8,384,126
All Gas Space Heating	57,974,754	60,321,411	2,346,657	4,363,366
Gas Furnace Only	47,129,611	49,484,032	2,354,421	3,682,908
All Electric Space Heating	48,027,208	61,744,135	13,716,928	3,334,736
Electric Furnace Only	22,164,552	32,977,502	10,812,950	399,474
Heat Pump Only	15,896,840	16,507,883	611,043	2,635,902

## Supplemental Materials

All Households	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	23,717,193	24,435,406	718,213	658,148
Midwest	29,545,071	30,534,299	989,228	1,273,243
South	50,384,002	54,015,453	3,631,451	4,534,476
West	28,782,000	30,699,086	1,917,086	1,918,259
Total	132,428,266	139,684,244	7,255,978	8,384,126

All Gas Space Heating	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	10,242,370	11,790,271	1,547,901	431,799
Midwest	18,138,448	19,687,148	1,548,701	909,221
South	13,750,172	12,816,385	(933,787)	1,555,480
West	15,843,764	16,027,606	183,842	1,466,866
Total	57,974,754	60,321,411	2,346,657	4,363,366

Gas Furnace Only	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	5,859,366	6,855,903	996,538	367,236
Midwest	16,320,083	17,692,439	1,372,356	781,961
South	12,123,983	11,445,773	(678,209)	1,206,545
West	12,826,179	13,489,915	663,736	1,327,166
Total	47,129,611	49,484,032	2,354,421	3,682,908

All Electric Space Heating	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	3,239,594	4,885,208	1,645,613	67,218
Midwest	5,248,974	6,998,030	1,749,056	202,759
South	30,617,600	37,854,671	7,237,071	2,790,906
West	8,921,039	12,006,227	3,085,187	273,853
Total	48,027,208	61,744,135	13,716,928	3,334,736

Electric Furnace Only	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	746,006	1,802,228	1,056,222	9,740
Midwest	2,664,599	4,232,907	1,568,309	62,592
South	14,877,227	20,695,767	5,818,539	276,957
West	3,876,720	6,246,600	2,369,880	50,185
Total	22,164,552	32,977,502	10,812,950	399,474

Heat Pump Only	2011	2019	Net Change 2011-2019	New Construction 2011-2019
Northeast	451,870	579,811	127,941	38,633
Midwest	824,561	823,770	(791)	119,988
South	12,880,698	13,219,666	338,968	2,316,750
West	1,739,711	1,884,636	144,924	160,531
Total	15,896,840	16,507,883	611,043	2,635,902

Source: US Census Bureau, American Housing Survey 2011, 2019 & Characteristics of New Housing, 2011 - 2019  
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