



Understanding Demand

Insights from the Multi-Tier Framework

Outline

Access to Modern Energy Cooking Services

Global fuel mix

Fuel and Stove Stacking

Adoption factors - Affordability

Adoption factors - Convenience



The Multi-Tier Framework is a tool to measure access

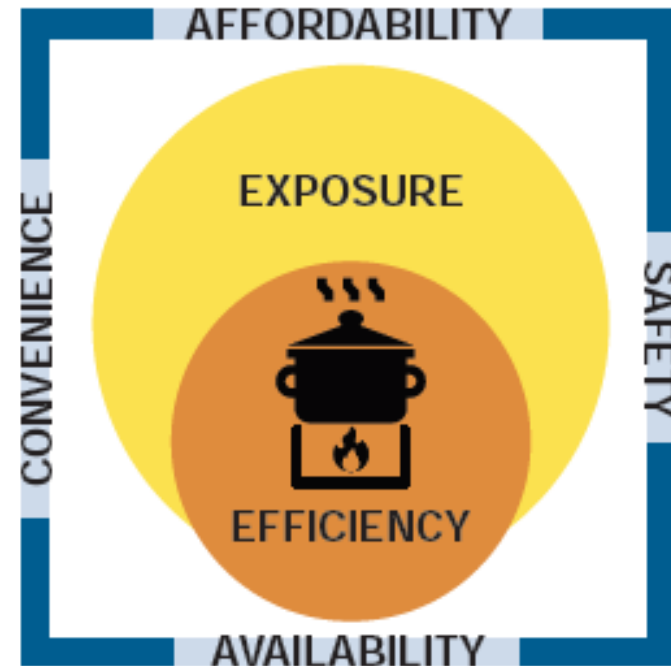
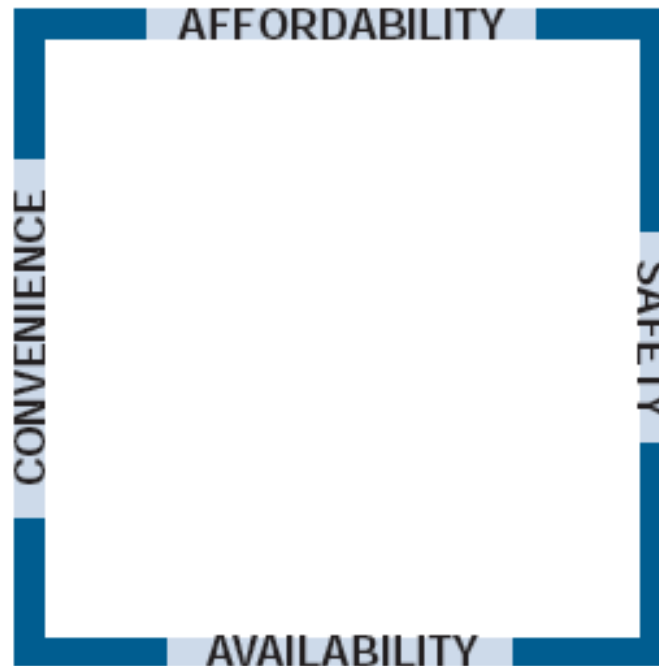
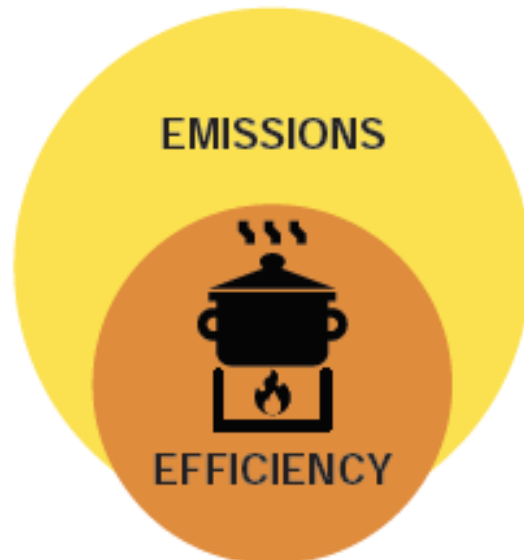
Performance-based, technical attributes that shape most definitions of "clean" cooking solutions



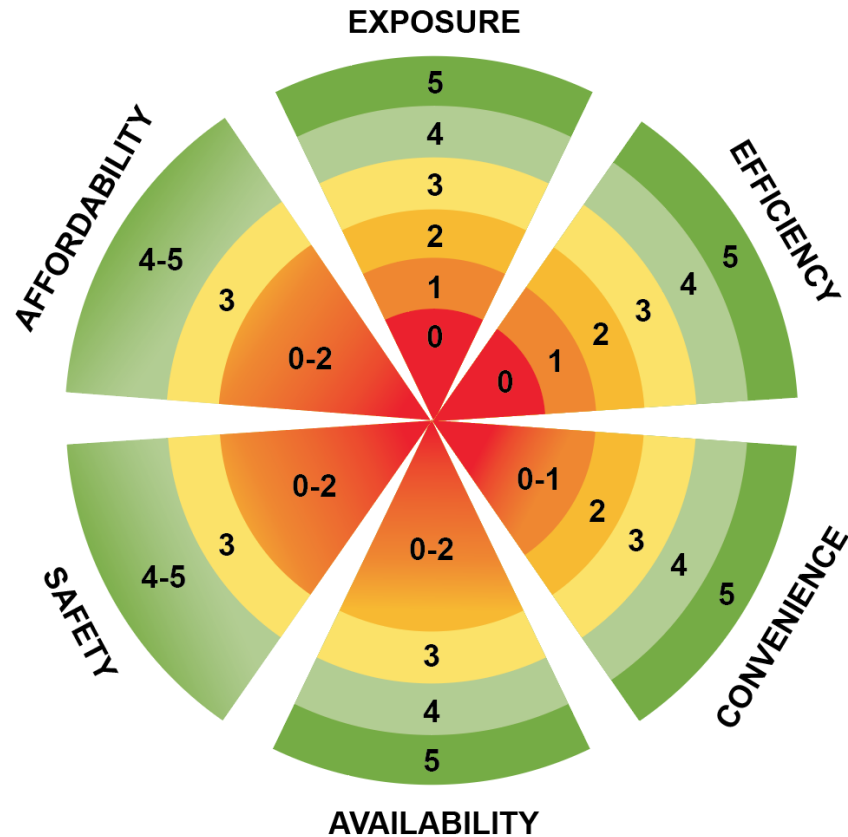
Attributes critical to understanding the household user's cooking context



Assessment of MECS access across the six attributes



Defining access to modern energy cooking services (MECS)

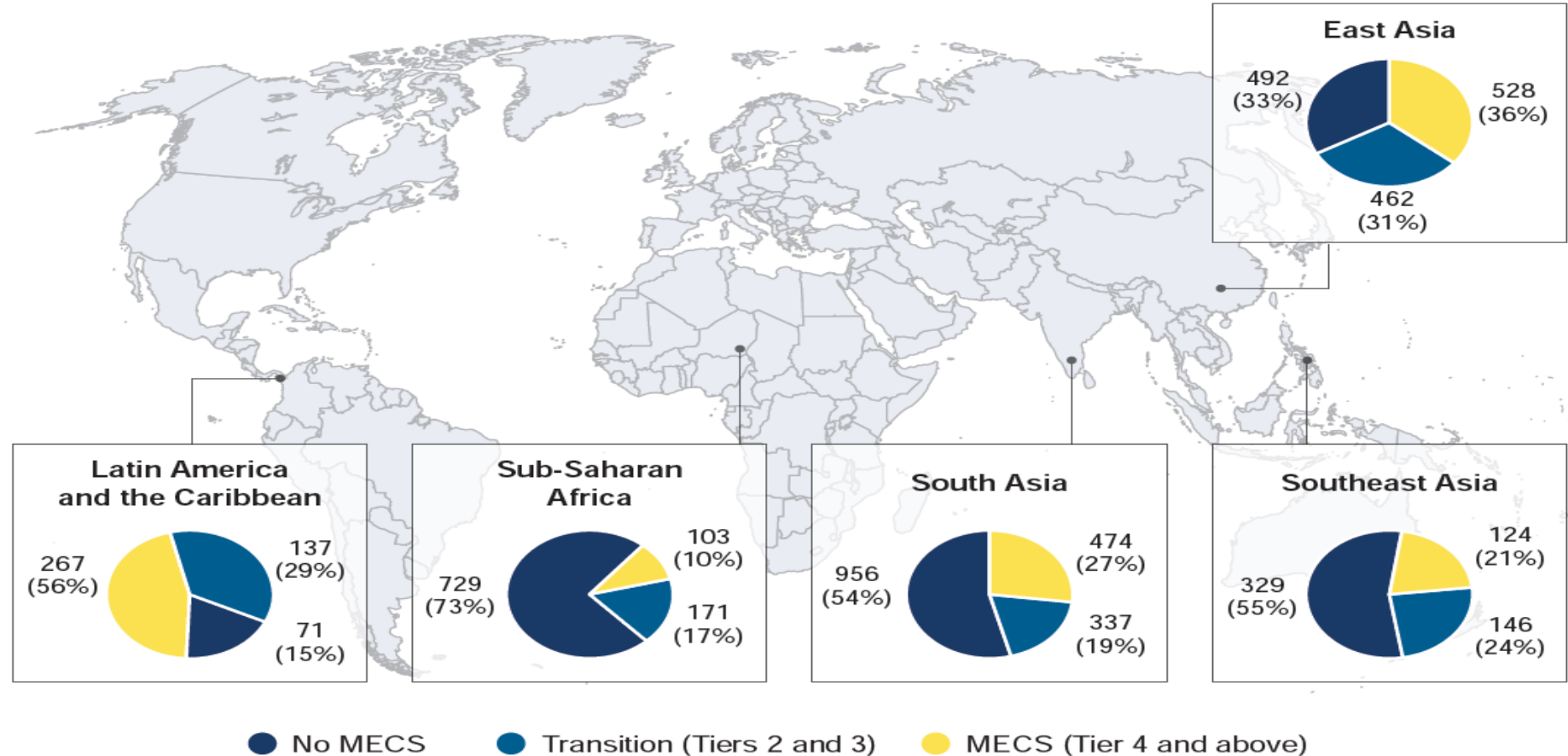


Modern Energy Cooking Services (MECS) Refers to a household context that has met the standards of Tier 4 or higher or above across all six measurement attributes of the Multi-Tier Framework (MTF)

Improved Cooking Services Refers to a household context that has met at least the Tier 2 standards of the MTF across all six measurement attributes but not all for Tier 4 or higher. Also referred to be in “*Transition*”

Estimated 4 billion people lack access to MECS

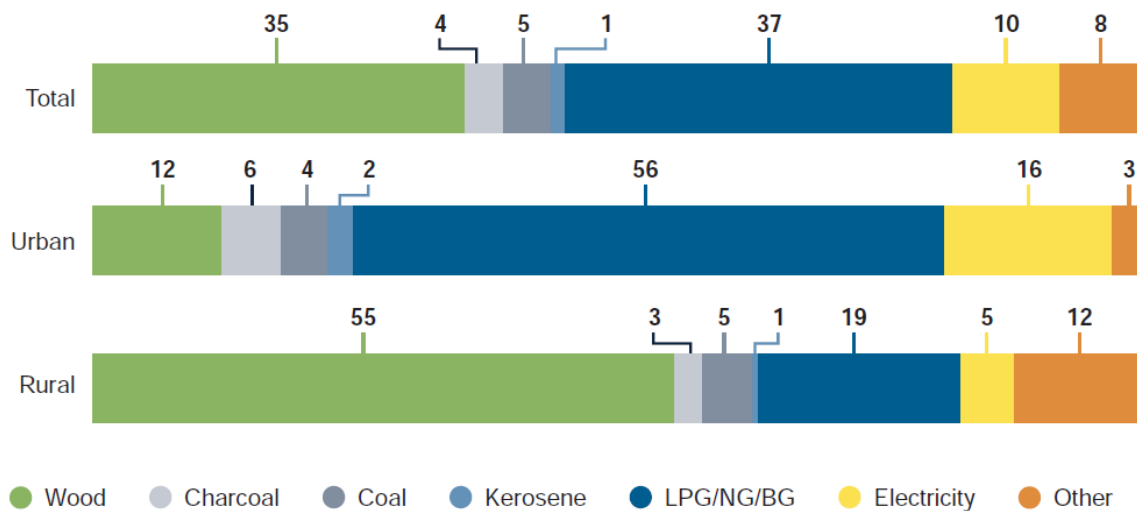
Millions of people and tier %
N = 71 countries



Households with access to clean fuels have increased as well as those using less clean fuels

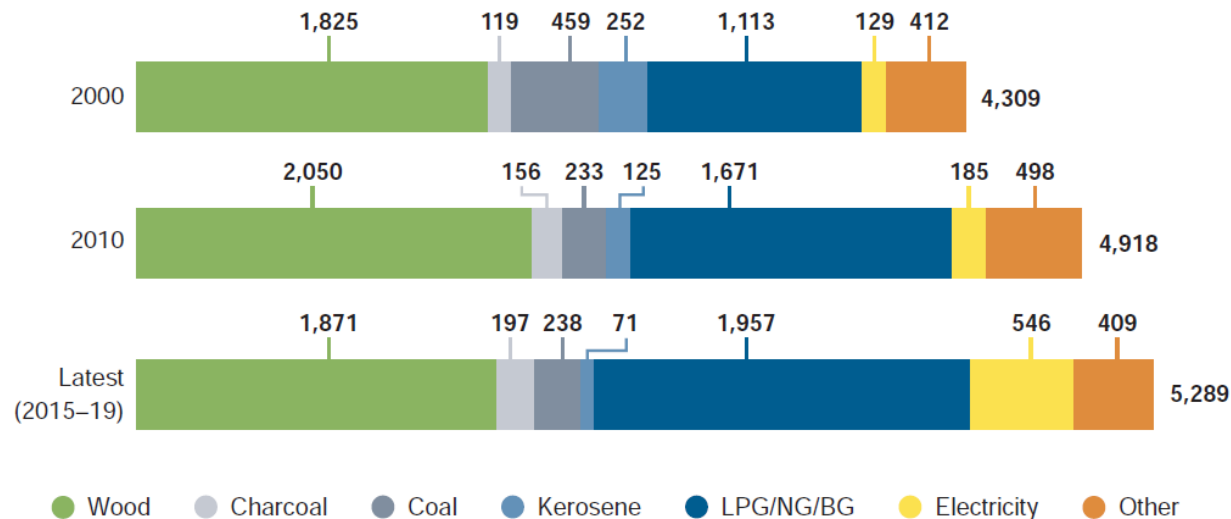
Global Primary Fuel Mix for Cooking

% global population



Evolution of Primary Fuel Mix for Cooking

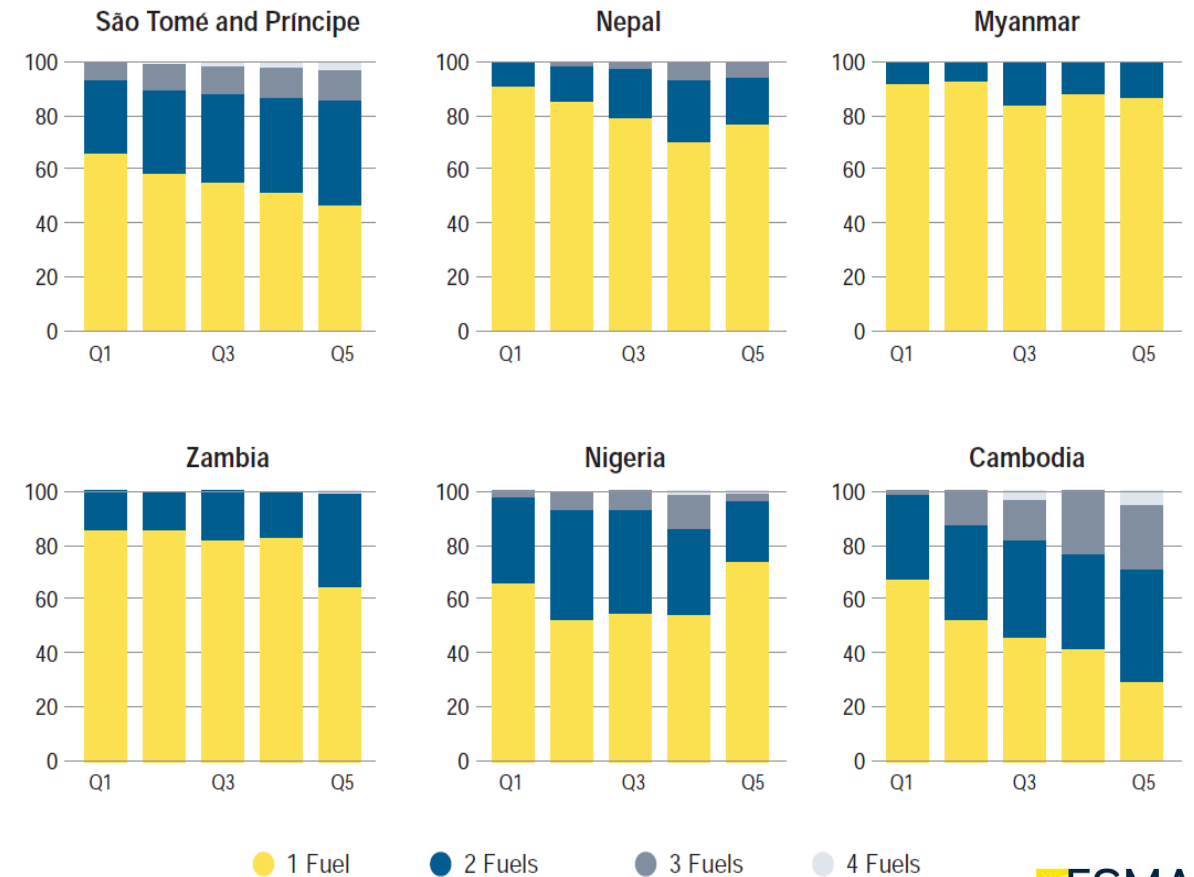
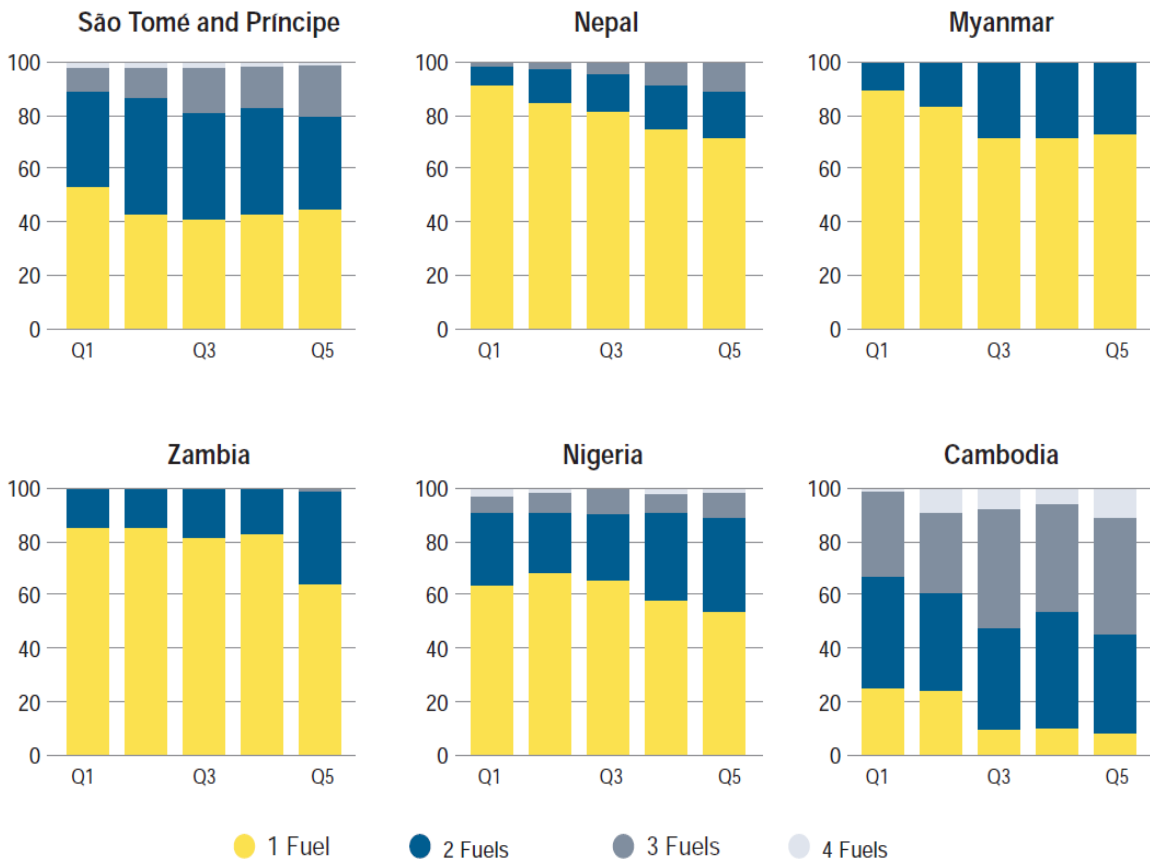
Millions of people



Stacking is prevalent among households, common in high-income, urban households

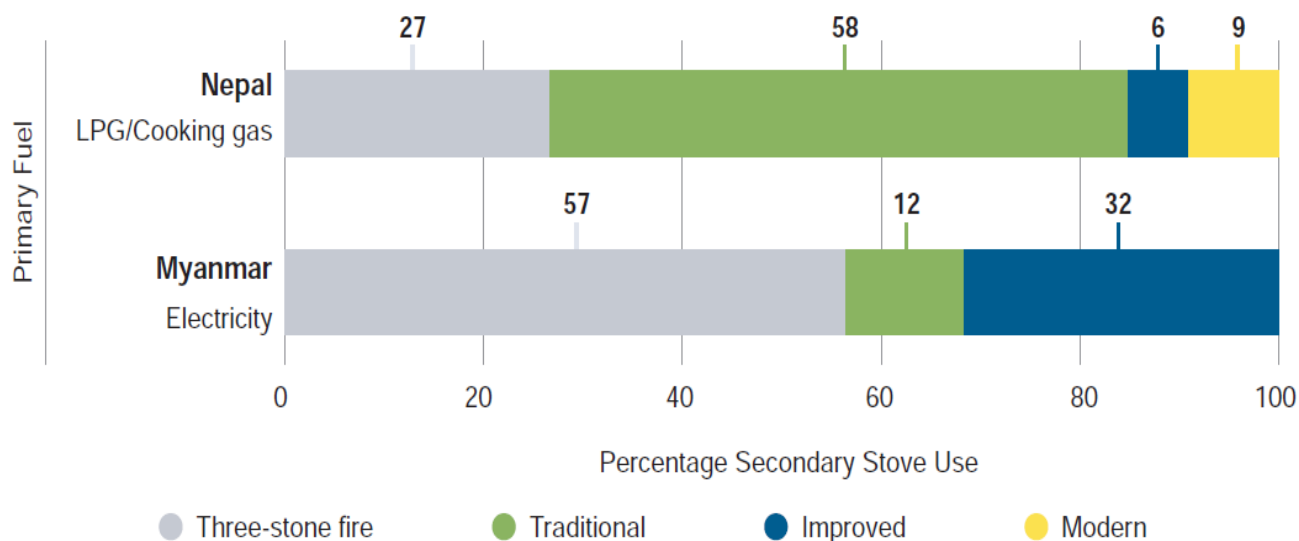
Stacking Behavior in Urban areas (%)

Stacking Behavior in Rural areas (%)



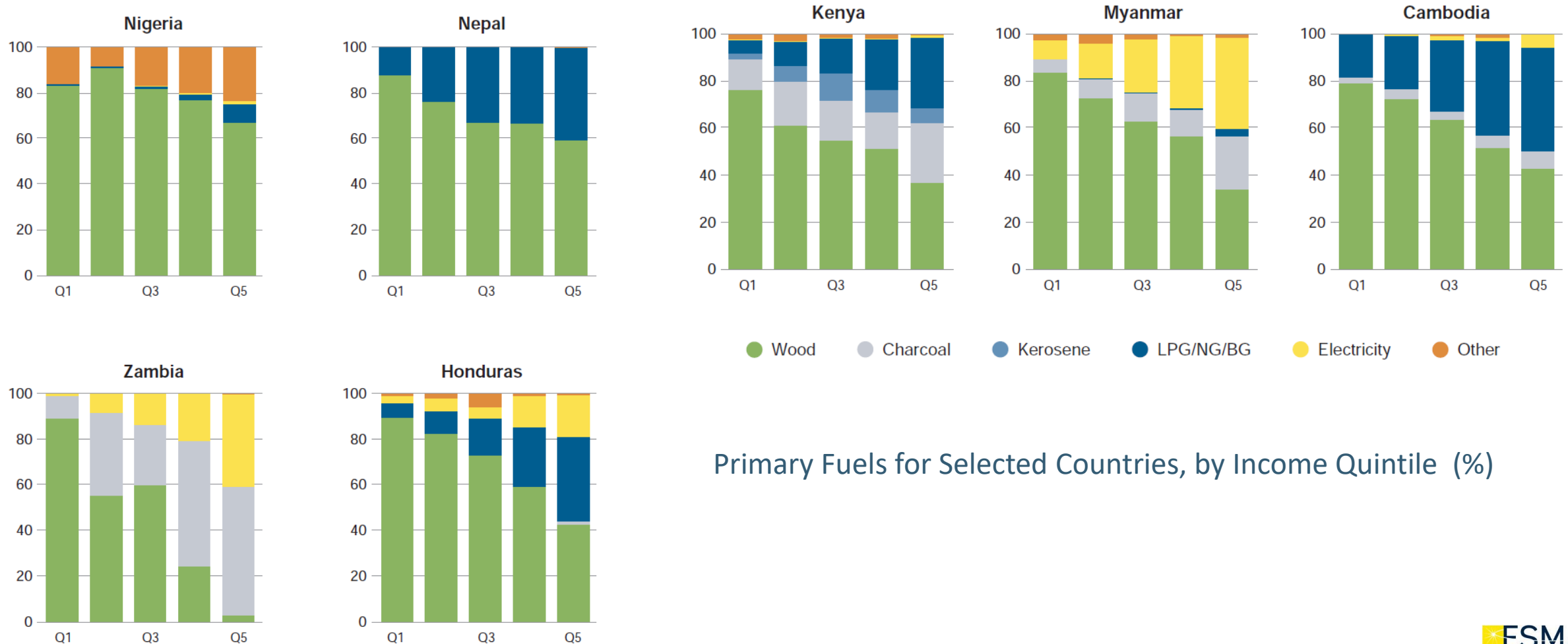
Stacking behavior has important implications for policies and campaigns

Secondary Stove Stacking in Rural Households of Nepal and Myanmar



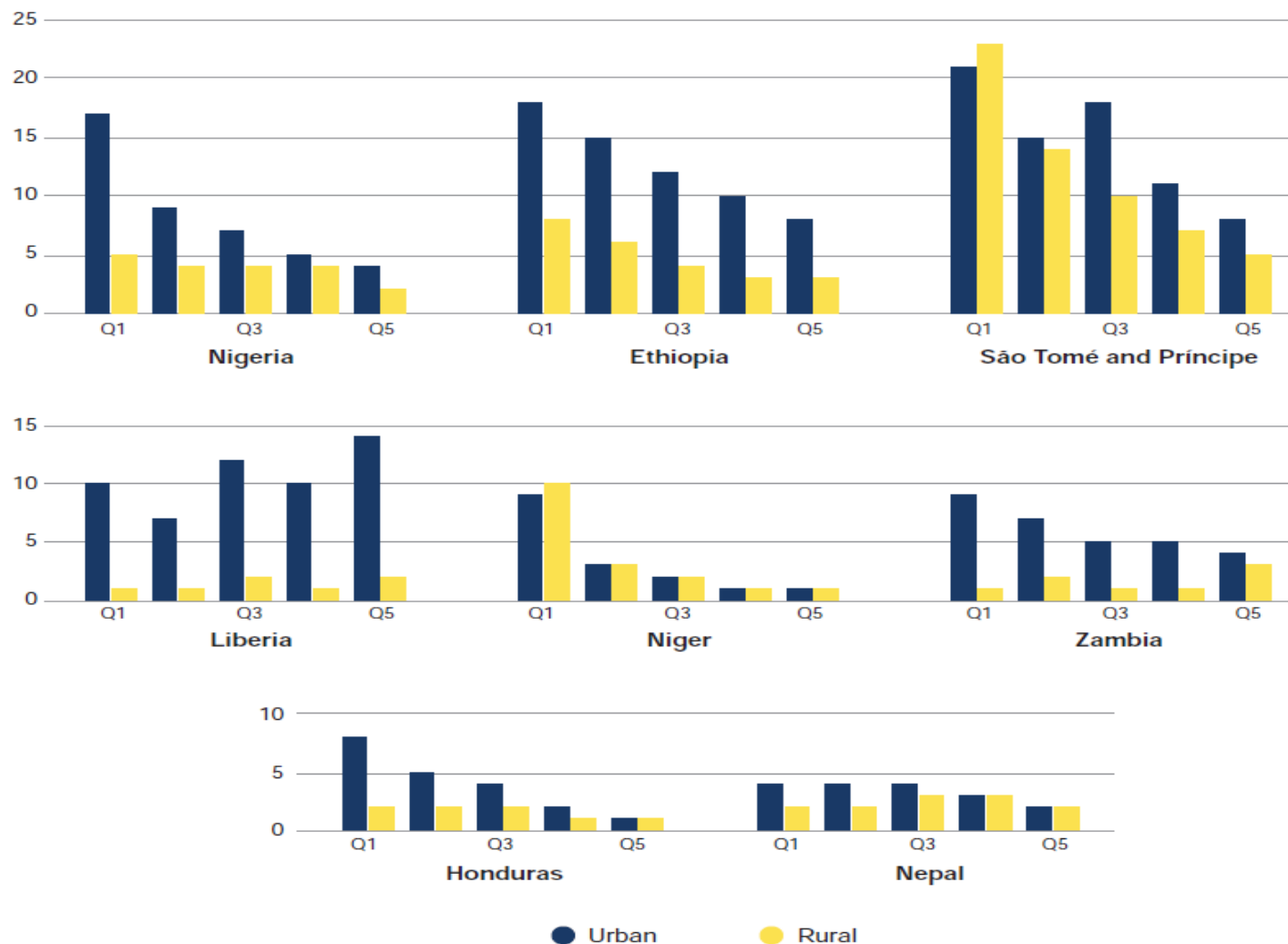
- Change the narrative on stacking
- Make stacking part of stove-promotion efforts by offering a suite of clean stacking options
- Standardize the number of stove burners to a minimum of two
- Capture data on secondary cookstoves

Income remains a fundamental driver of fuel and stove demand



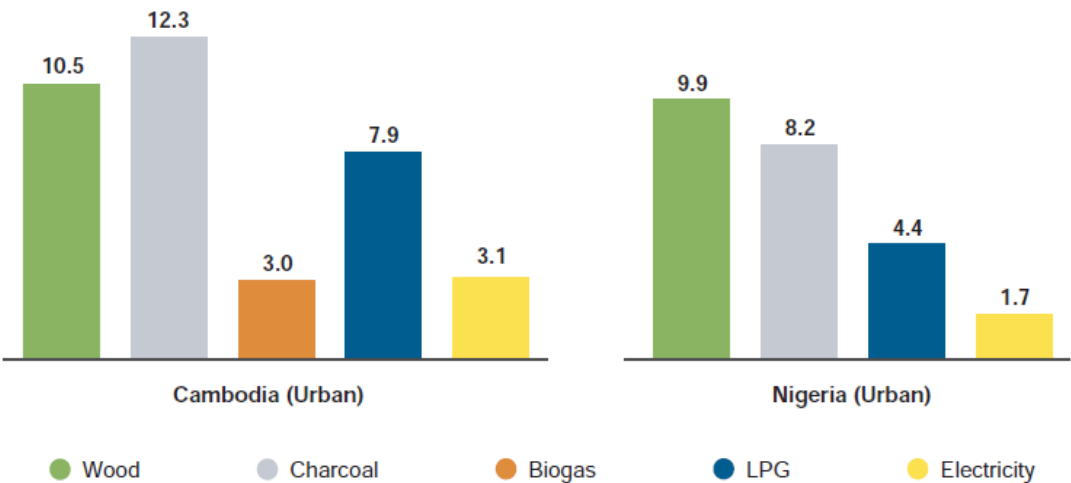
Affordability remains a barrier to access for lower-income and rural households

% of household income



Convenience factors are measured by time and vary by fuel but are consistent across countries

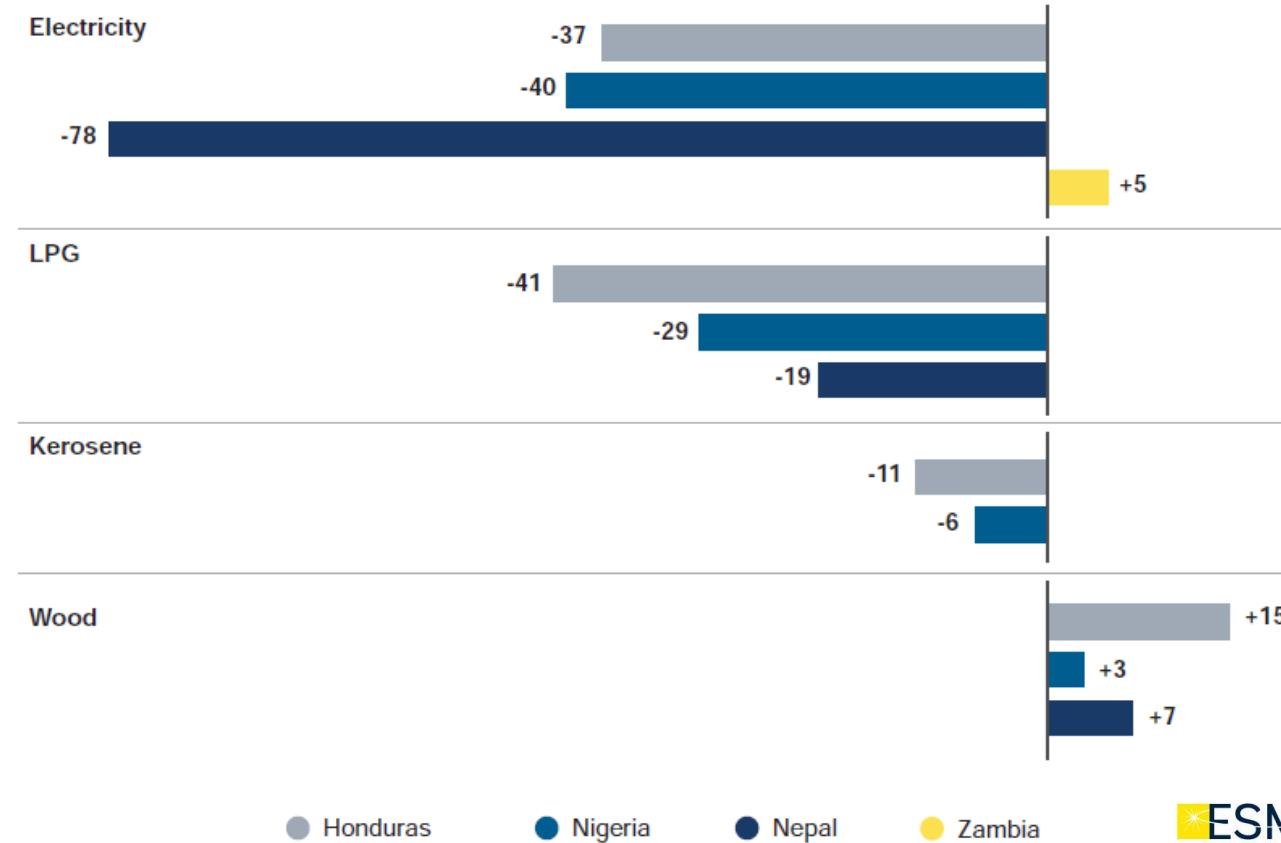
Average number of minutes per meal



Stove Preparation Time by Fuel in Urban Settings of Two Countries

Difference in Cooking Time by Fuel versus Average Time across All Fuels for Selected Countries

Minutes per day by primary fuel users



Efforts to accelerate access to MECS need to have users at the center



Ensuring demand requires that services, products and interventions are adapted to household needs

Overcome barriers of high up-front capital costs, low levels of public awareness, and low availability

Where stacking persists, new messaging around product value and aspiration