Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

Monitoring the German market for energy efficiency services
5 years of hunting an unknown animal

ECEEE 2019

Ann-Cathrin Horward - BfEE
Dominik Rau - Prognos

Background - Federal Energy Efficiency Center (BfEE)

- "designated national authority" pursuant to Energy Services Directive (2006/32/EC)
- tasks defined in Energy Efficiency Services Act (last amended in 2015)
  - **observing and evaluating the market for energy services and energy efficiency measures**

Aims

- Support (further) development of energy efficiency measures
- Strengthen transparency for market actors in the field of energy efficiency

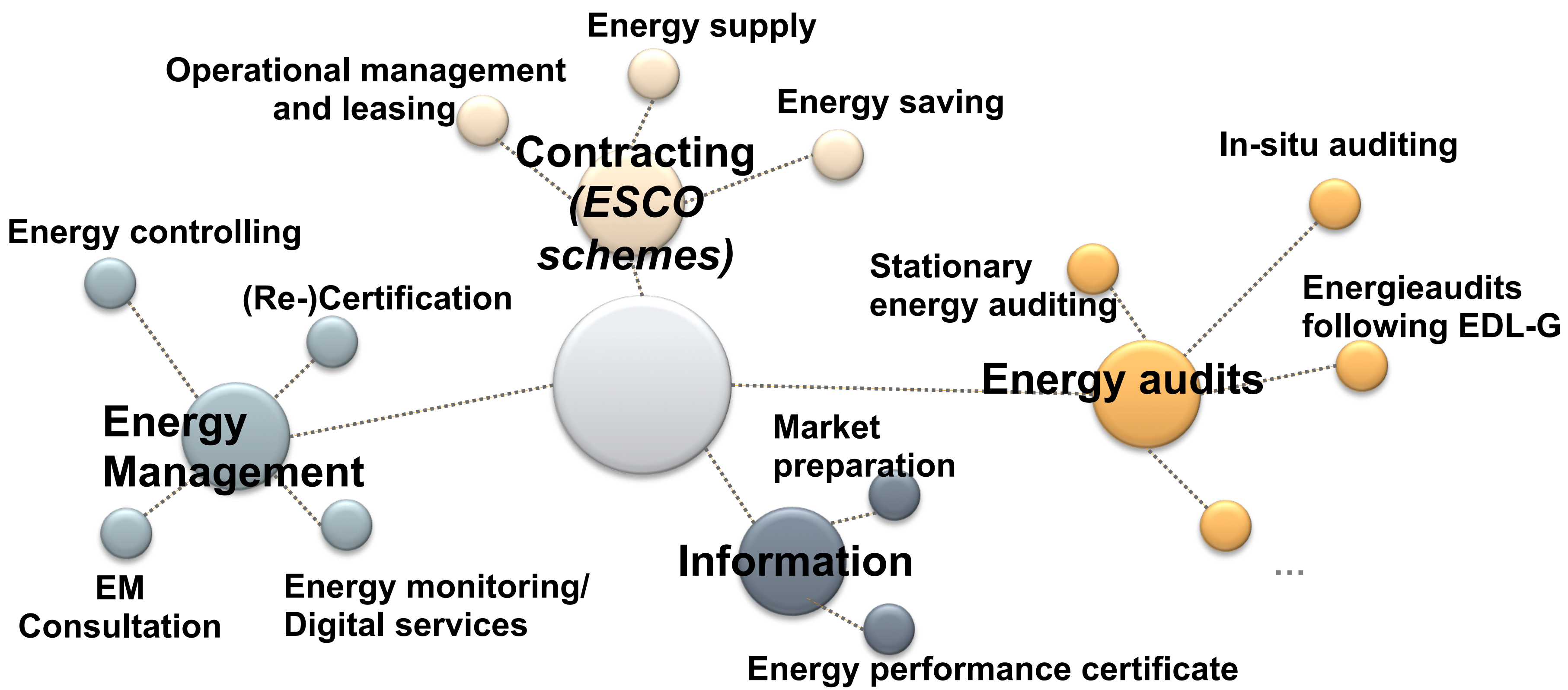
Use

- Reporting from energy efficiency directive
- Evaluation and scientific support for the Ministry of Economy and Energy

Projects

- Marketstudy 2013, Survey 2016 & 2017, 2018
- Observation e.g. energy management systems, quality of energy audits, legal barriers for contracting

Overview: analysed energy services in detail



Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

Structure of the study

Demand	Supply

Statistical information

Industry

Sectors (WZ, 2 Stellen); Country within Germany; Number of employees; Sales;

Private households

(leased) property, year of construction, annual income, size of household

➢ **New in 2018**

Public sector

Country within Germany, administrative level, number of buildings

Key questions

- **Marketvolume**
  - Prices of products and services
  - Sales
- **Offering structure**
  - Number of suppliers
  - regional distribution of suppliers
  - sectors
  - size and sales of suppliers
  - products and services
- **Demand for energy efficiency**
  - Main customer group
  - Use of energy services
  - readiness to use / obstacles
  - Reason /motivation to use energy services

ifeu KANTAR EMNID prognos

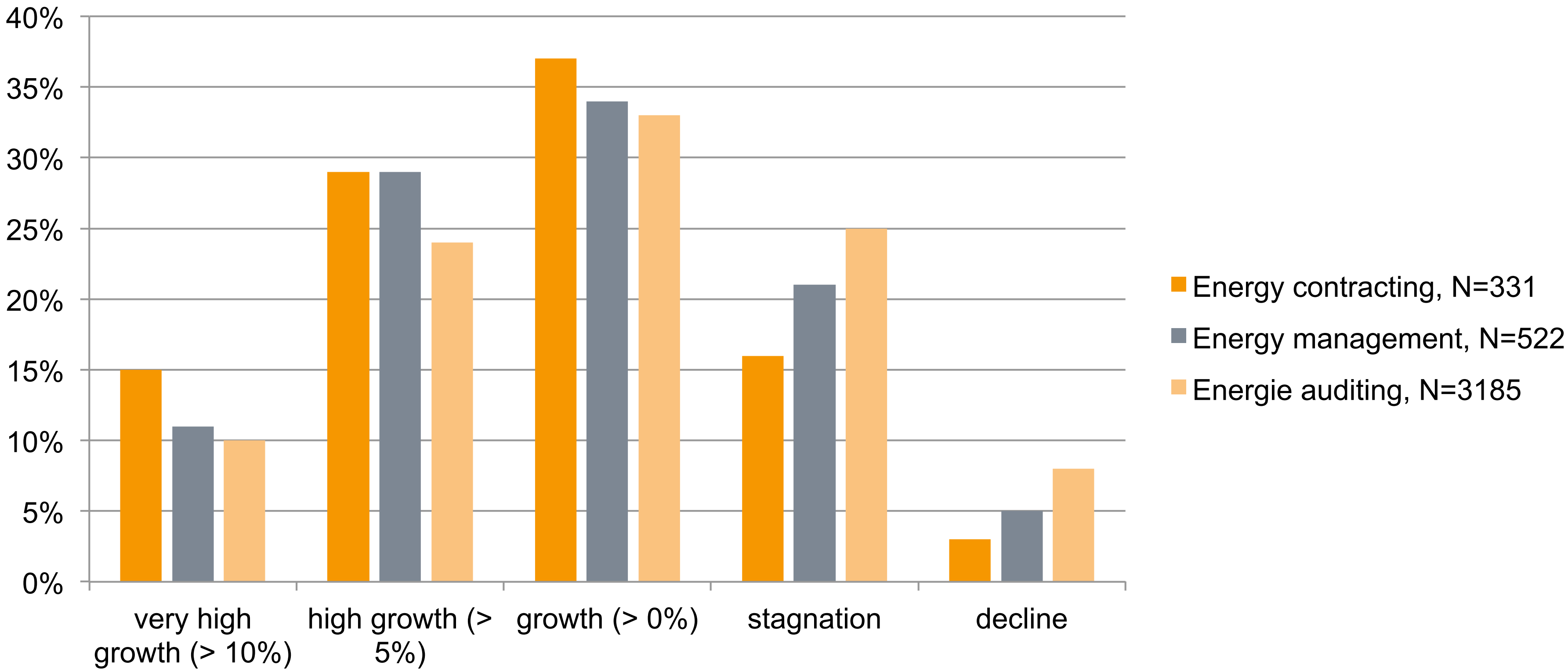
Market volume development from 2016 to 2018

	2018	2017	2016
Energy audits	ca. 370 - 402 Mio. Euro	ca. 790 - 850 Mio. Euro	ca. 470 - 520 Mio. Euro
Energy contracting	ca. 7,2 - 8,6 Mrd. Euro	ca. 7,7 Mrd. Euro	ca. 7,2 - 8,4 Mrd. Euro
Energy management	ca. 466 Mio. Euro	ca. 435 Mio. Euro	ca. 200 Mio. Euro
Total	**8,0 – 9,5 Mrd. Euro**	**8,9 – 9,0 Mrd. Euro**	**7,9 – 9,1 Mrd. Euro**

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE FÜR ENERGIE EFFIZIENZ

Suppliers estimate further growth of the market



ifeu KANTAR EMNID prognos

In short….

- market oriented energy services offer a diverse market segment with lots of different actors – from small energy consultancies to global players

- the BfEE market study 2018 offers a systematic overview over the most important sectors from a suppliers and demand point of view

- Energy efficiency is an important topic, especially in the public sector

- In general the market seems to be quite stable with robust growth perspectives

- All in all, there is a good distribution of suppliers in Germany

➢ *there is no lack of suppliers, there is a problem on the demand side*

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

ENERGY EFFICIENCY SERVICE SURVEY 2018

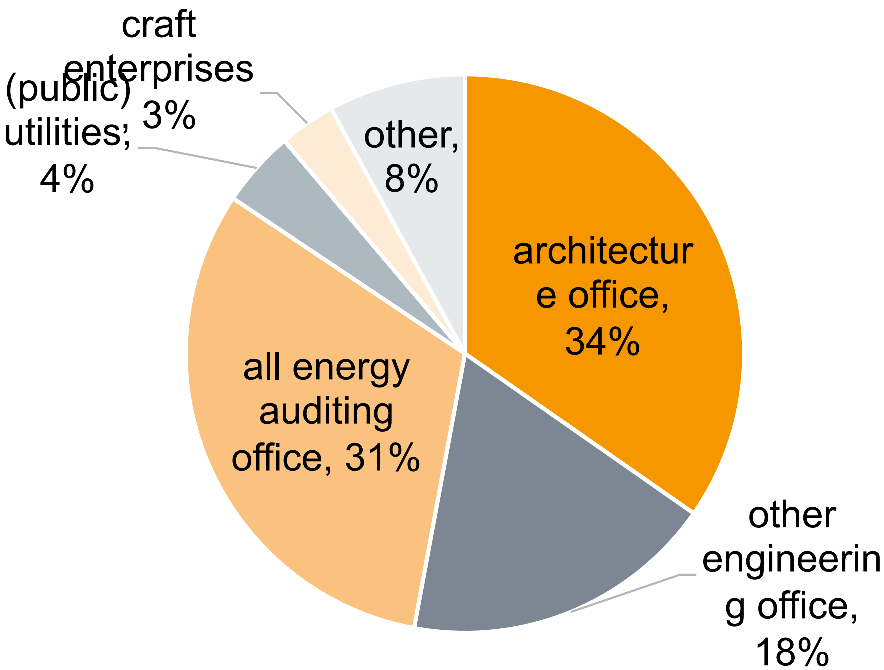
THE ENERGY AUDITING MARKET

ifeu KANTAR EMNID prognos

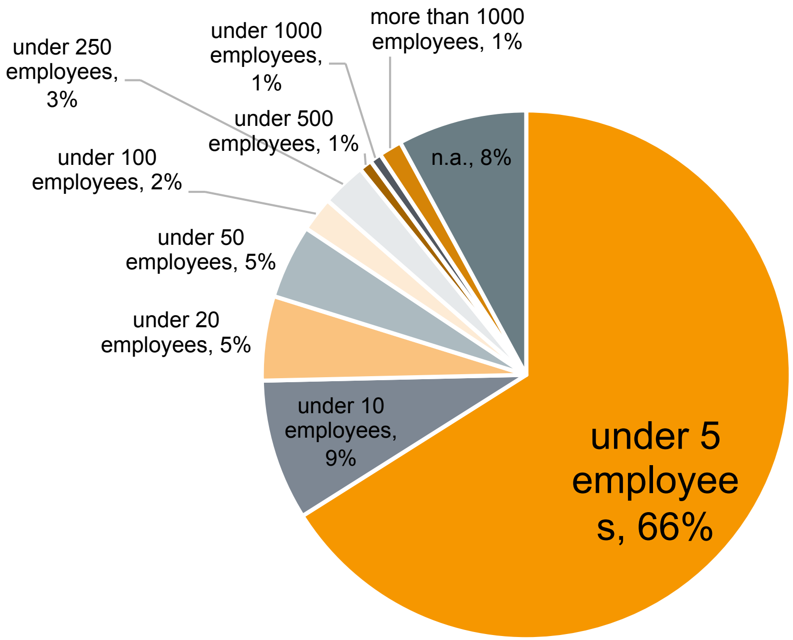
Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

Core area of energy auditing still in specialized small and micro businesses



EES survey 2018, Supply side of energy auditing, n=1.278

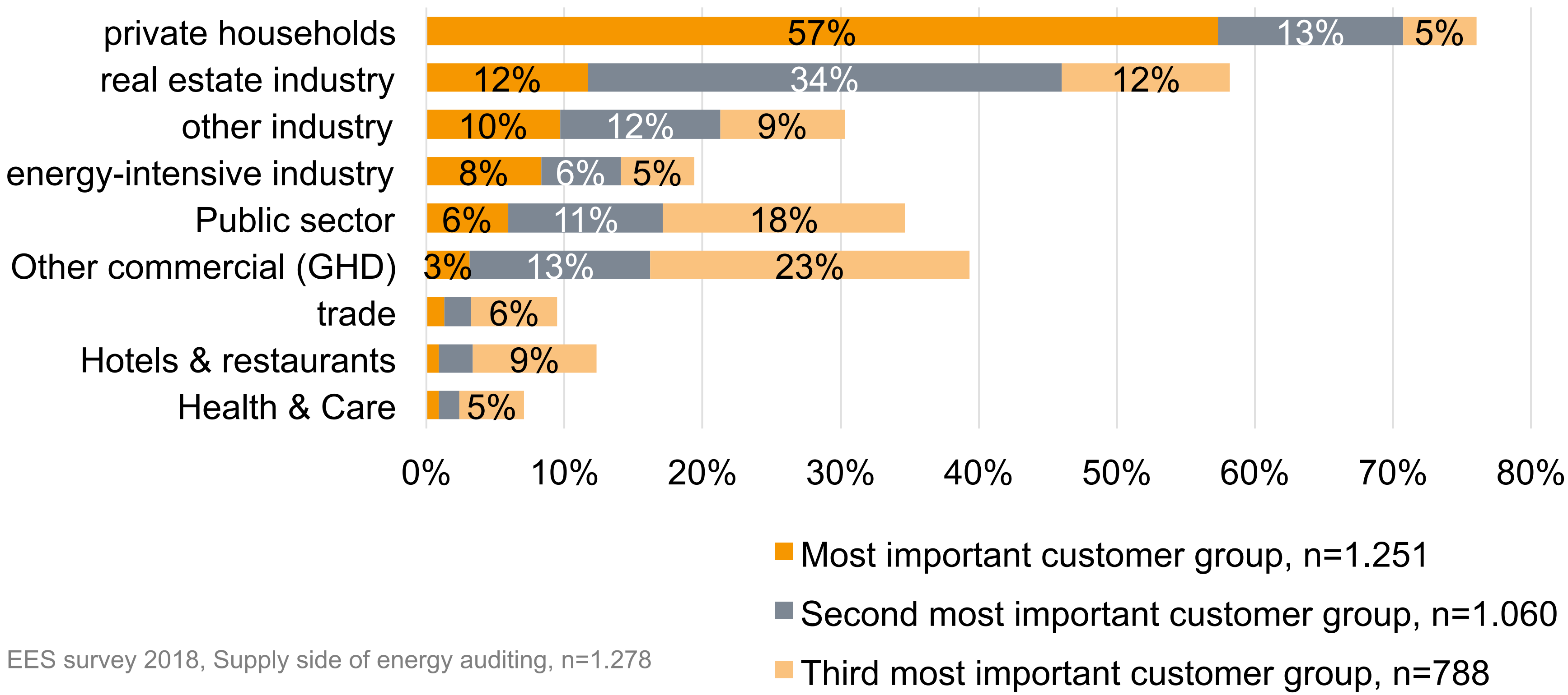


EES survey 2018, Supply side of energy auditing, n=1.278

- ✓ 2,2 full-time positions on average per energy auditing company
- ✓ 30 % turnover share for energy auditing per company

ifeu KANTAR EMNID prognos

Target groups from supply side view – Private households prevail



EES survey 2018, Supply side of energy auditing, n=1.278

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

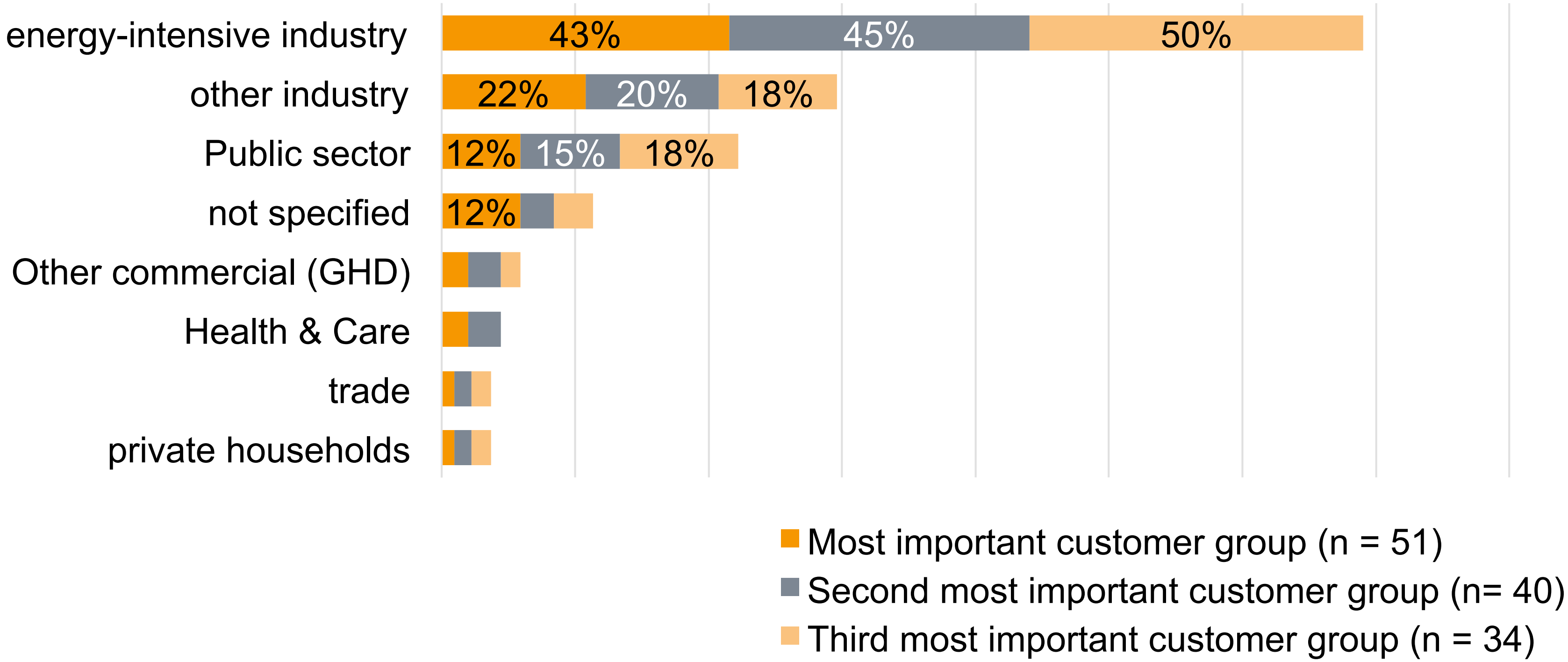
BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

ENERGY EFFICIENCY SERVICE SURVEY 2018

THE ENERGY MANAGEMENT MARKET

ifeu KANTAR EMNID prognos

Industry remains by far the main customer

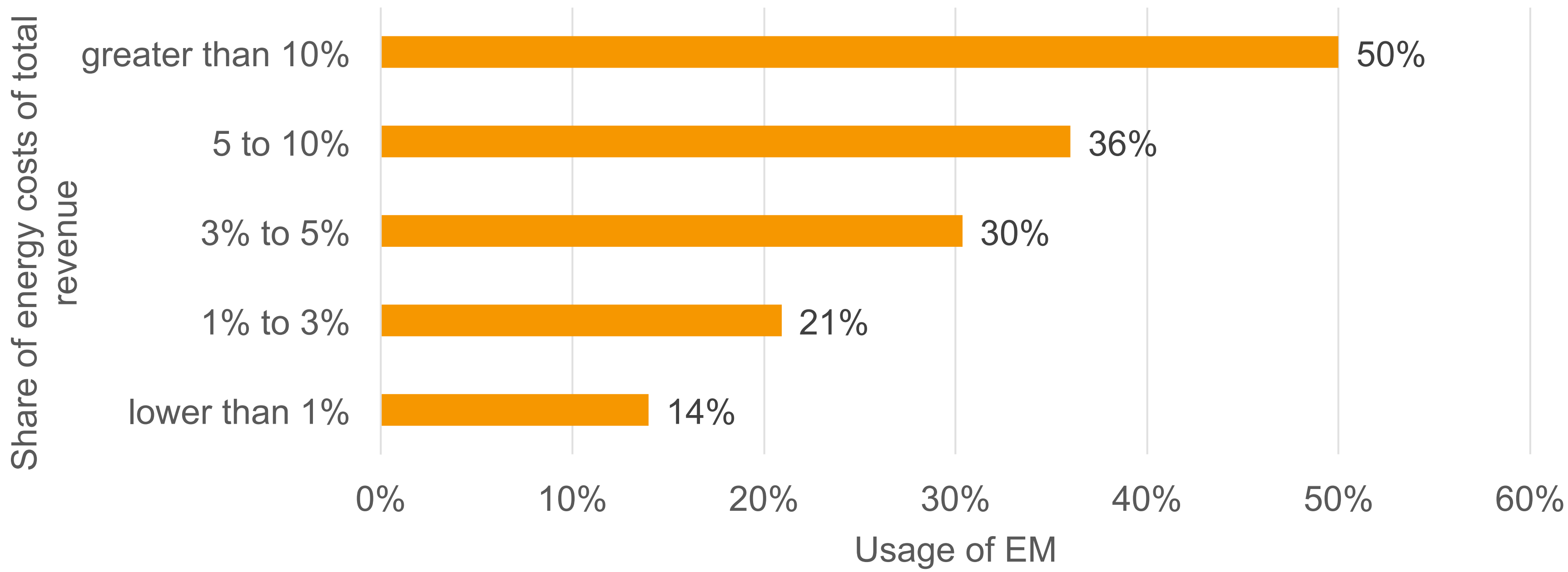


EES survey 2018, Energy management suppliers

Bundesamt für Wirtschaft und Ausfuhrkontrolle

BUNDESSTELLE FÜR ENERGIE EFFIZIENZ

High shares of energy costs of total revenue are a high motivation for EM



EES survey 2018, consumers of EM products, n = 2.000

ifeu KANTAR EMNID prognos

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

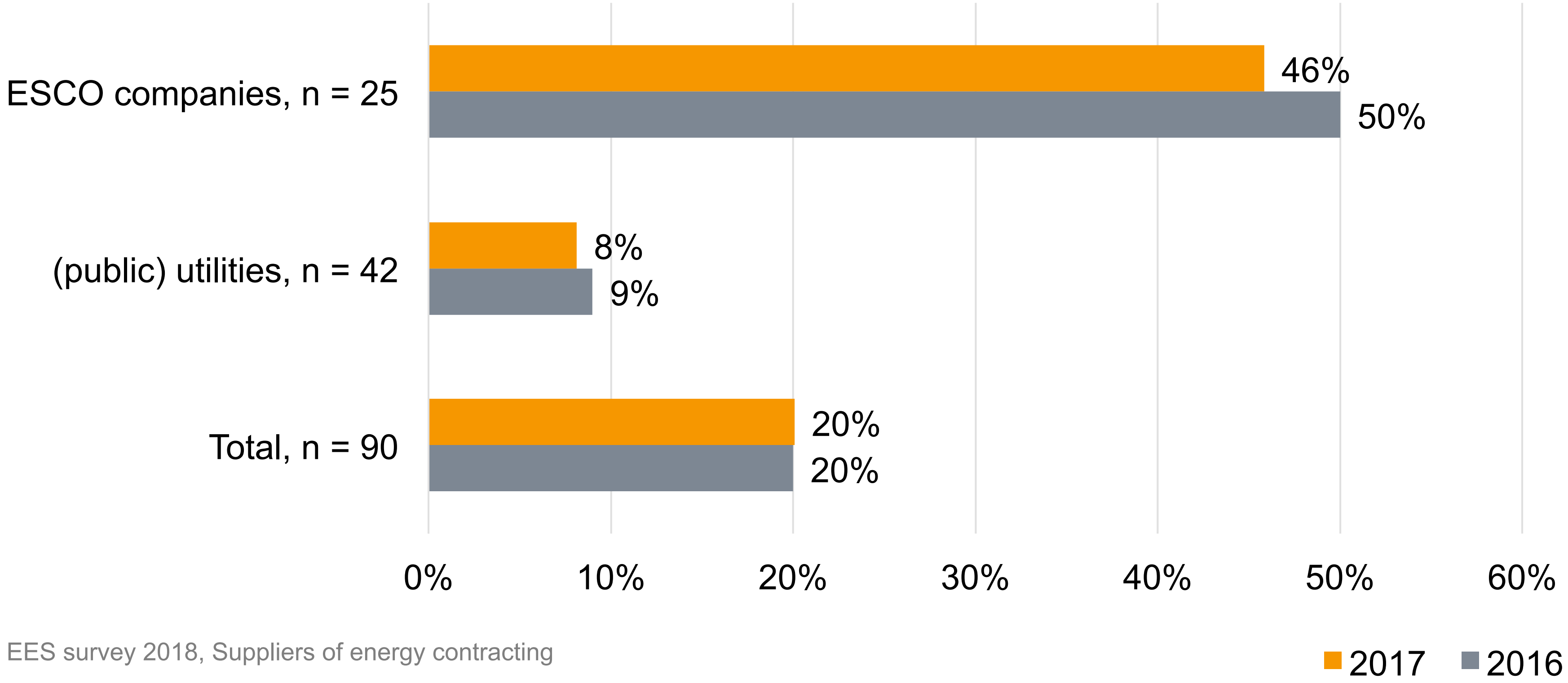
BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

ENERGY EFFICIENCY SERVICE SURVEY 2018

THE MARKET FOR ENERGY CONTRACTING

ifeu KANTAR EMNID prognos

Stable revenues for big players

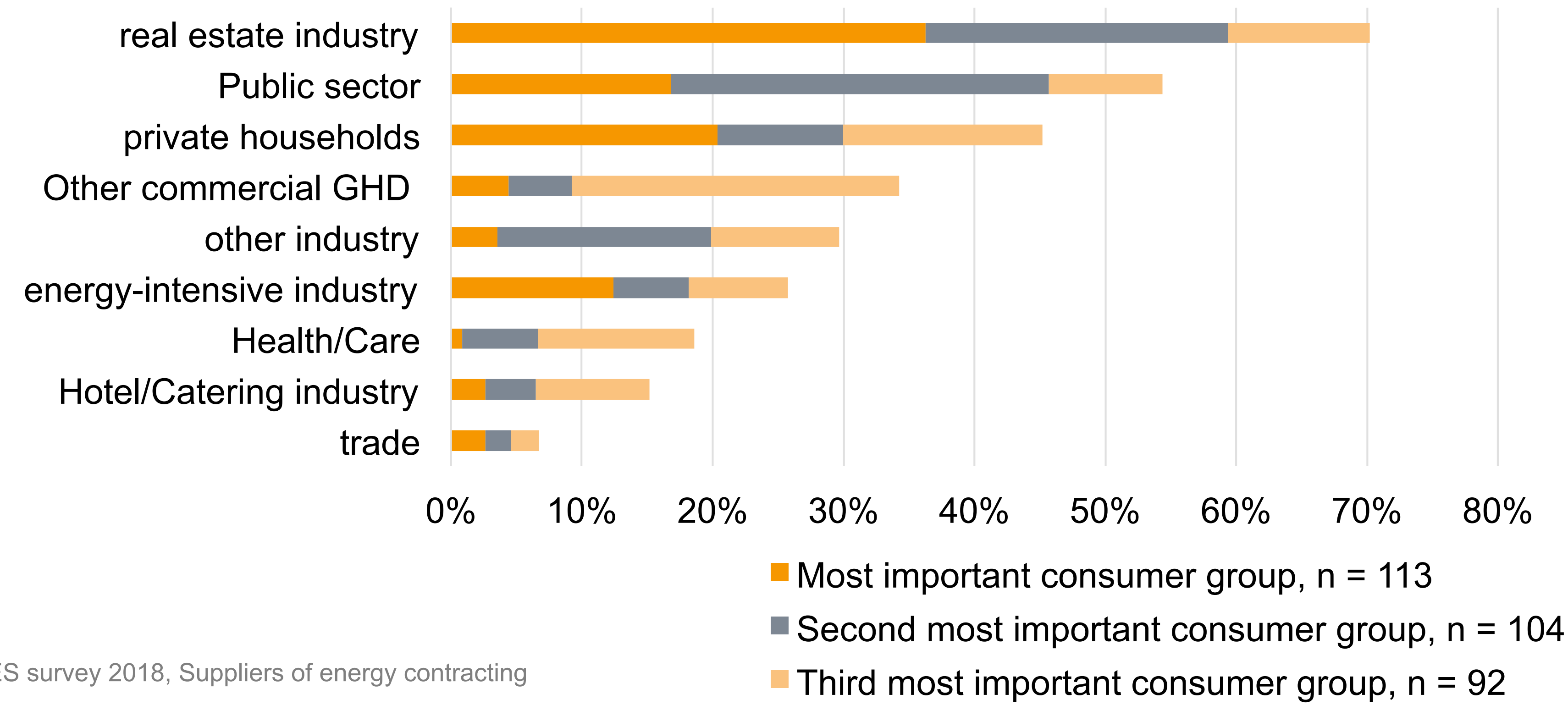


EES survey 2018, Suppliers of energy contracting

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE FÜR ENERGIE EFFIZIENZ

Buildings sectors are the most important consumers of energy contracting



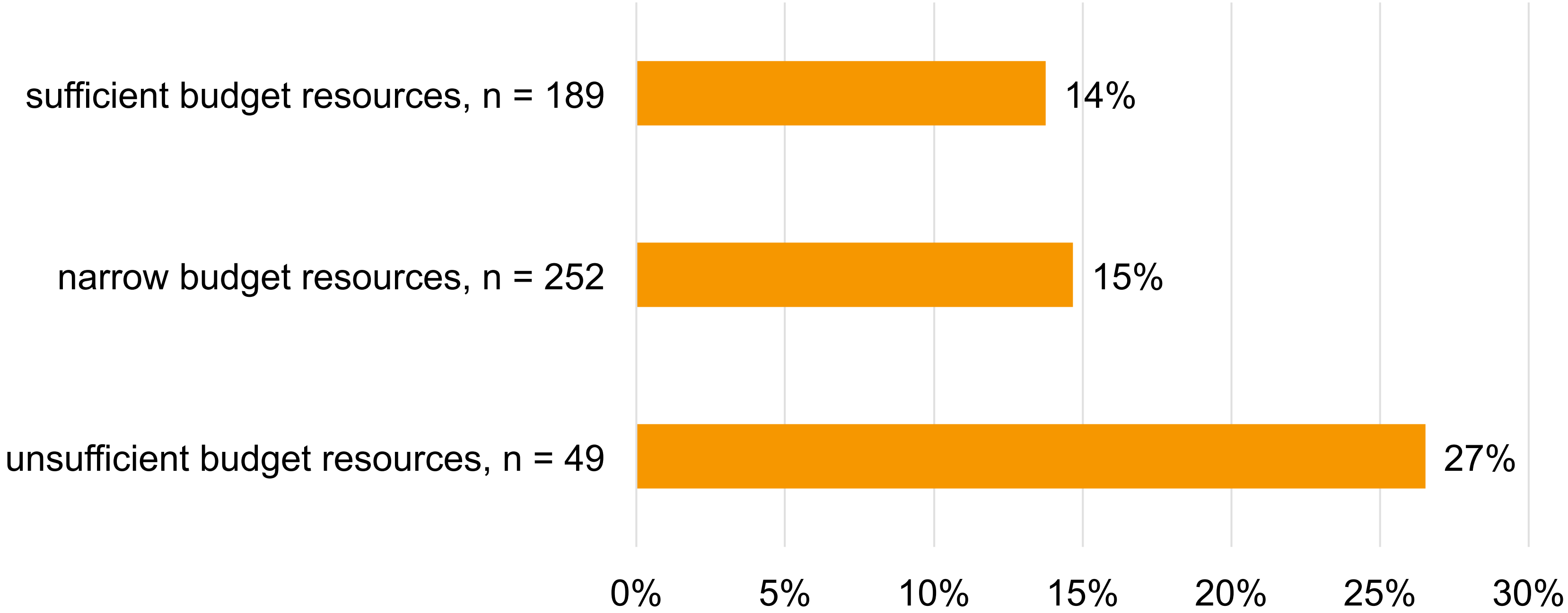
EES survey 2018, Suppliers of energy contracting

ifeu KANTAR EMNID prognos

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE FÜR ENERGIE EFFIZIENZ

Low budgetary resources are a high incentive for the use of energy contracting in public institutions



EES survey 2018, Public sector

ifeu KANTAR EMNID prognos

Intricate markets, developing methods

- Five years of chasing an unknown animal:
  - Very heterogenious supplyside, only few really large players
  - In part a large variety of different small scale businesses
  - Often only working on efficiency services partially
- Fewer loop holes, better hunting
  - Big data led to more stable results
  - Methodology gets more stable every year
  - Demandside remains limiting factor: EES definitions unclear, answers ambiguous

➢ Coming 2019: Larger samples and more integration of external data sources

Bundesamt
für Wirtschaft und
Ausfuhrkontrolle

BUNDESSTELLE
FÜR
ENERGIE
EFFIZIENZ

Thank you for the attention! Your feedback is welcome!

Ann-Cathrin Horward
Federal Center for Energy Efficiency

+49 6191 9082-748

Ann-Cathrin.Horward@bafa.bund.de

Dominik Rau
Prognos AG

+49 30 520059-231

Dominik.rau@prognos.com