

## Sector Monitor Energy Efficiency 2014

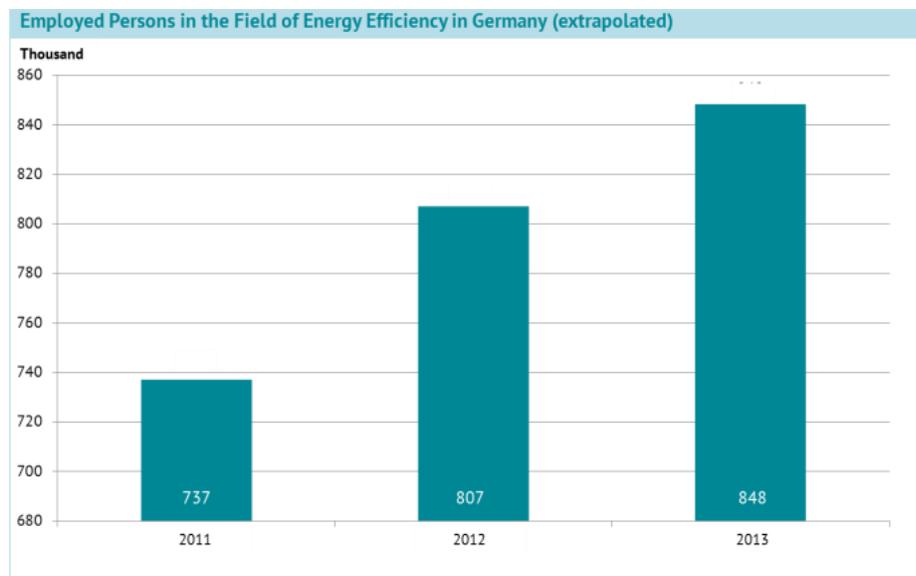
### Summary

The purpose of the Sector Monitor Energy Efficiency 2014 of the German Industry Initiative for Energy Efficiency (DENEFF) is to follow up the Sector Monitor 2013 and provide an updated qualitative and quantitative overview of the market for energy efficiency services and products in Germany. The analysis shows the trends, success factors and challenges for the energy efficiency market; it is aimed at energy efficiency companies, policymakers and the media. In addition, using the annual market indicators, it illustrates the economic importance of the efficiency sector.

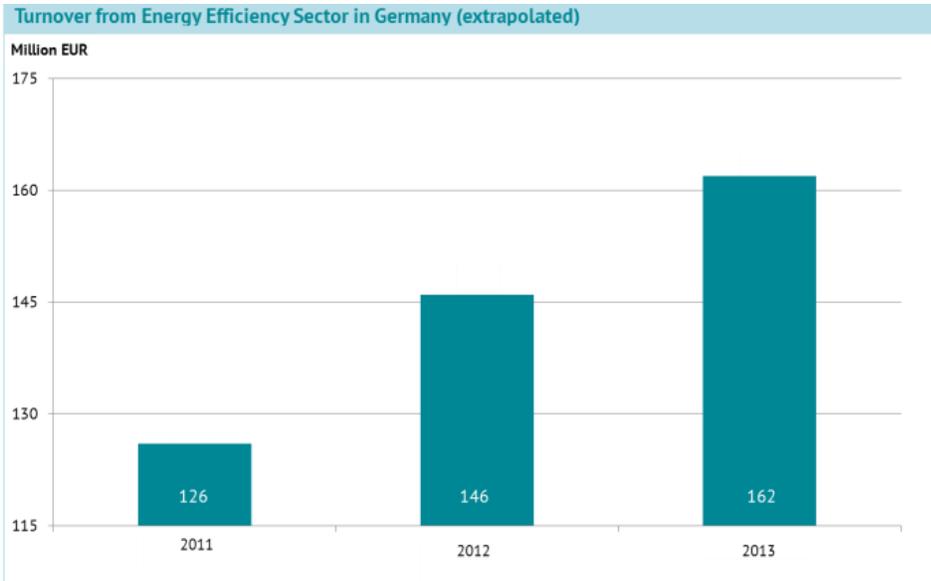
Overall, the indicators of the Sector Monitor offer an important stimulus for political discussions and strategic marketing considerations. The Sector Monitor is published annually (since 2013) and thus allows observers to track the development of the growing and changing energy efficiency market. For the Sector Monitor 2014, analysts

collected and evaluated the data of 90 energy efficiency companies across the economy, as well as applicable existing and recurring annual studies and statistics. The results of the survey reflect primarily the perspective of suppliers on the market. Like last year, the market figures illustrate the importance that the energy efficiency sector has in the German economy.

The extrapolations based on the survey showed that in 2013 more than 800,000 employees in Germany were active in the energy efficiency sector. The total turnover of the sector amounted to EUR 162 billion. In comparison with last year, however, turnover decreased slightly. While during 2011-2012 revenue growth of 16 % was recorded, the turnover from 2012 to 2013 grew only 11 %. This development is also reflected in the employment figures: growth decreased from around 10 % to 5 %.



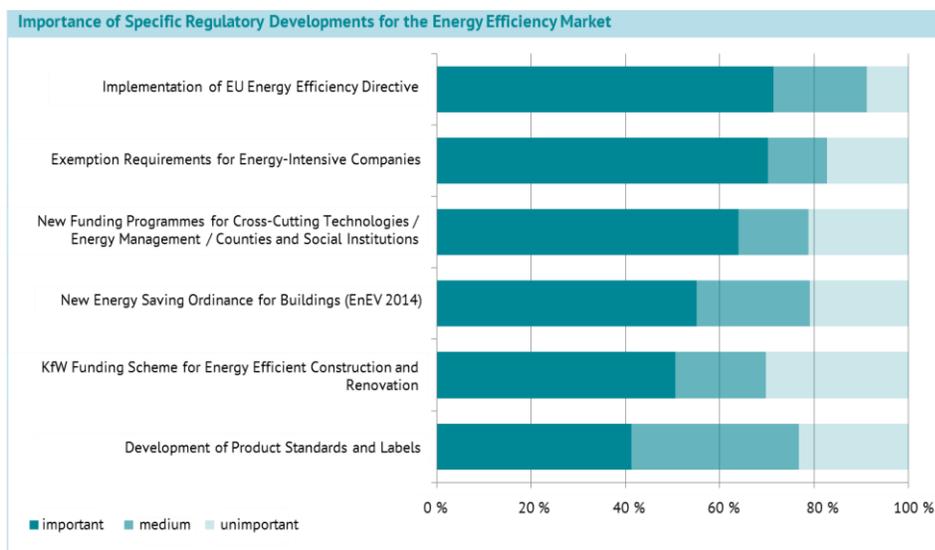
Source: DENEFF Survey "Sector Monitor 2014", extrapolated on the basis of data from "Sector Monitor 2013"



Source: DENEFF Survey "Sector Monitor 2014", extrapolated on the basis of data from "Sector Monitor 2013"

The generally positive growth trend in the branch is influenced by regulatory, socio-economic and technical drivers. As last year, the sector still has high hopes for the implementation of the EU Energy Efficiency Directive. Socio-economically, rising energy prices remain a key driver of the expansion of the energy efficiency business. As for the technical trends, companies are mostly relying on load management and demand-driven control, but also on new developments of highly efficient production modes and cross-cutting technologies.

Although the general mood in the energy efficiency market is still described as good by the companies surveyed, their evaluation of it was somewhat less positive than last year. This is reflected, among other things, in the evaluation of the individual attractiveness factors of the market. In terms of current energy efficiency policies, the companies see a clear need for considerable improvement.



Source: DENEFF Survey "Sector Monitor 2014"

In addition, according to the interviewed market participants, the barriers to market entry are higher. Nevertheless, the majority of companies expect an increase in competition on the market. The availability of skilled employees is still mostly insufficient; the difference between demand and availability of college graduates and skilled workers is the highest. In order to prevail in the face of

increasing competition and higher barriers to market entry, quality and customer orientation – and not cheap and standardized deals – are the essential factors of success, according to the companies surveyed.

**For the full report (German only) visit our website:**

[www.deneff.org/inhalte/publikationen-studien.html](http://www.deneff.org/inhalte/publikationen-studien.html)

**For further information, please contact:**

Charlotte Ruhbaum

Manager Energy Efficiency in the Industrial Sector  
Deutsche Unternehmensinitiative Energieeffizienz e.V.  
Kirchstr. 21  
10557 Berlin  
GERMANY

Tel: 0049 (0)30 39 88 76 04  
charlotte.ruhbaum@deneff.org