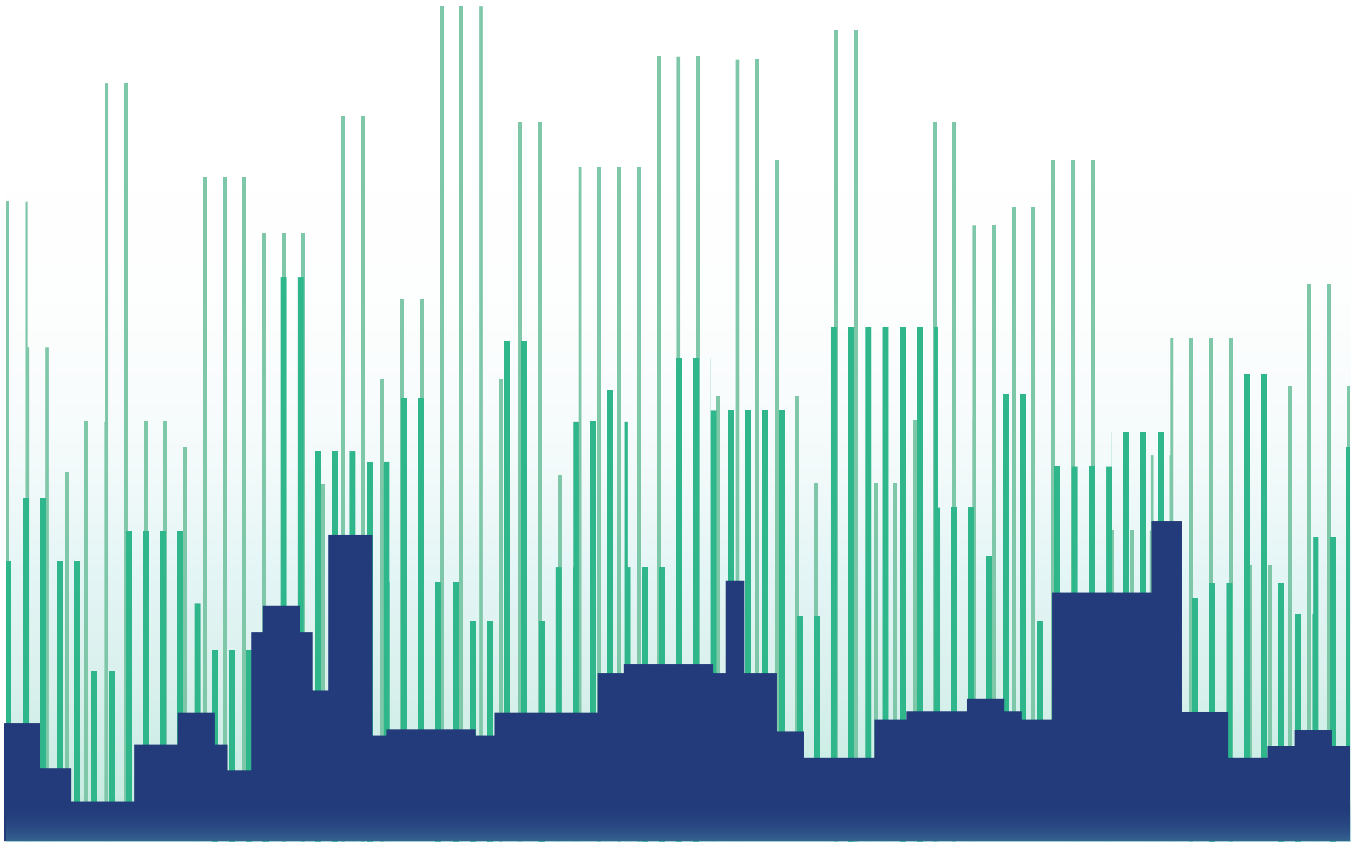
Energy Efficiency Trends Annual Report 2012/13

Essential insight for consumers and suppliers of non-domestic energy efficiency



September 2013

About EEVS

EEVS is a leading global provider of independent performance information and analysis services for energy efficiency.

Our core service is high quality performance measurement and verification for energy efficiency projects. Since 2011 we have evaluated the performance of hundreds of energy-saving projects to the global good practice standard – the International Performance Measurement and Verification Protocol (IPMVP).

This impartial and good practice analysis is vital for the industry's development – enabling suppliers to prove their performance credentials, whilst giving consumers all-important comfort that they are getting value for money from their investments.

Our wider information services complement this project-level analysis and aim to support greater market transparency, improving the attractiveness of energy efficiency as an investment and accelerating the uptake of the best performing technologies and services.

For further details about EEVS and our services, please visit **www.eevs.co.uk**

About Bloomberg New Energy Finance

Bloomberg New Energy Finance (BNEF) is the definitive source of insight, data and news on the transformation of the energy sector. BNEF has staff of more than 200, based in London, New York, Beijing, Cape Town, Hong Kong, Munich, New Delhi, San Francisco, São Paulo, Singapore, Sydney, Tokyo, Washington D.C., and Zurich.

BNEF Insight Services provide financial, economic and policy analysis in the following industries and markets: wind, solar, bioenergy, geothermal, hydro & marine, gas, nuclear, carbon capture and storage, energy efficiency, digital energy, energy storage, advanced transportation, carbon markets, REC markets, power markets and water. BNEF's Industry Intelligence Service provides access to the world's most comprehensive database of assets, investments, companies and equipment in the same sectors. The BNEF News Service is the leading global news service focusing on finance, policy and economics for the same sectors. The group also undertakes custom research on behalf of clients and runs senior-level networking events, including the annual BNEF Summit, the premier event on the future of the energy industry.

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Preface

Welcome to the latest edition of *Energy Efficiency Trends*. Regular readers may notice a couple of changes to this instalment; firstly, having undertaken the research for four consecutive quarters we are delighted to have developed an Annual Report for the 2012/13 period. The quarterly charts for the Q2 2013 period (April to June) are still included, but with over 600 responses throughout the year we have also been able to produce a robust report on the state of energy efficiency market in 2012/13.

The second big change is the addition of our new research partner, Bloomberg New Energy Finance. I am delighted to say that *Energy Efficiency Trends* will now benefit from their extensive expertise and global perspective on energy efficiency matters (as you will see from this edition).

We've come a long way in the last 12 months and I am very grateful to Drumbeat Energy Management for their sponsorship support; industry bodies the EMA and ESTA for their endorsement; and most importantly to everyone that has contributed to, and utilised the outputs of, *Energy Efficiency Trends*. I very much hope that you will continue to do so over the next 12 months.

Ian Jeffries
EEVS

This edition of *Energy Efficiency Trends* marks the start of Bloomberg New Energy Finance's partnership in this exciting project with EEVS. As a provider of market information on clean energy and low carbon technologies we are familiar with the challenges in producing reliable data on the energy efficiency market, so we were impressed with both the scope and transparency of the reports. We also saw an opportunity to join forces: by combining insight from our own research with the strong analytical template that EEVS had already established we felt that we could produce the definitive outlook on trends and developments in energy efficiency.

We are delighted to now be seeing what started as a tentative conversation some months back bearing its first fruit – but we are by no means resting on our laurels. Expect to see plenty more as we work with EEVS to consolidate and develop *Energy Efficiency Trends*. The market for energy efficiency is set to evolve, driven by policy developments, novel financing models and the emergence of new technologies. Together with EEVS we will be tracking those trends and finding new ways to answer the key questions facing all stakeholders in energy efficiency.

Tom Rowlands-Rees
Bloomberg NEF

In the last 12 months, 1516 energy efficiency projects were commissioned by 332 organisations with an estimated value of £84million

Suppliers offered a range of more than 25 energy saving technologies and services for customers to choose from

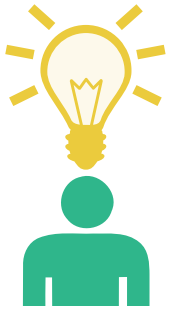
Quick facts:

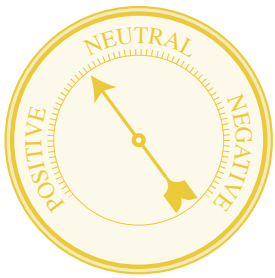
up

steady

down

- **Lighting** has been the most-commissioned technology type, with both high-efficiency lighting and lighting controls being consistently popular with consumers.
- **Large corporates** are leading the way, with 9 out of 10 having commissioned energy efficiency technologies.
- **Supplier Confidence –** the industry outlook has been cautiously optimistic, but our new sentiment tracker suggests that confidence might now be waning.
- **High expectations –** consumers are looking for investments to payback within 5 years; less than 3 years for SMEs.
- **Performance measurement** is not yet embedded but is increasingly being specified in larger projects.
- **SMEs –** lagged behind both larger organisations and the public sector with less than 6 out of 10 commissioning projects, compared with an industry-wide figure of 74%.
- **Long-term view –** larger projects with longer payback periods are not yet seen in large numbers.
- **Third-Party Finance** played only a small role in energy efficiency investments, with less than 1 in 10 projects being funded this way.





Executive Summary – Annual Report 2013

The EEVS / Bloomberg *Energy Efficiency Trends* surveys were conducted quarterly from September 2012 to August 2013 and completed by a total of 650 respondents (448 consumers and 202 suppliers). The majority of respondents were UK-based, with a small proportion from other, mostly European, territories.

Consumer Trends

- **Overall investment – we estimate that consumer respondents invested £84 million in energy efficiency over the last 12 months. Of this, SMEs invested £6m, public sector organisations £38m and large corporates £37m. The estimated average spend was c£27,000 per consumer***.
- **Procurement** – 74% of respondents (332) reported undertaking some form of energy saving project in the last 12 months. Large corporates led this drive; 9 out of 10 reporting undertaking projects, while SMEs have lagged somewhat with 58% uptake.
- **Technologies** – lighting-related technologies dominated the 2012/13 market; 1 in every 4 projects commissioned was either high efficiency lighting or controls. A wide range of other technologies and measures (20+) were however deployed with behaviour change, building management systems and building fabric improvements the top three deployments beyond lighting.
- **Performance** expectations were high in 2012/13 with 1 in 3 expecting their projects to payback with 3 years. For SMEs this figure increased to 6 out of 10. These expectations are softened slightly within the larger corporate and public sector groupings where 3-5 year payback was broadly expected. Few organisations were willing to undertake projects with 10+ year payback.
- **Measurement** – in the context of these financial expectations, the survey also revealed that 7 out of 10 consumers did not measure project performance to a recognised standard (e.g. IPMVP). As a result, many consumers will not have been able to reliably evaluate value-for-money performance.
- **Funding** – there has been a stand out trend towards use of in-house capital to pay for energy efficiency over the last 12 months; more than 7 out of 10 projects were funded in this way. Mirroring the reportedly slow take up of UK Green Deal finance in the domestic sector, there has also been only modest take up of third-party finance within the non-domestic sector.

Supplier Trends

- **Energy Efficiency Supplier Confidence Indicator (EESCI) shows a 'cautiously positive' industry in the last 12 months. It also shows that confidence levels have dipped during 2013 possibly as staff recruitment is put on hold or headcount reduced.**
- **Order Books** – demand from national customers was positive during 2012/12, with 8 out of 10 suppliers reporting stable or growing order books. Overseas demand was more muted with 65% reporting no change in order levels from international customers.
- **Industry concerns** – as might be expected, the level of customer demand was the standout concern (for almost 4 out of 10 suppliers) in amongst a broad mix of other competing business concerns.
- **Headcount** – across the whole year over half the respondents reported no change in staff numbers, but of the remainder there was a trend towards increasing headcount, but the quarterly results show that this is declining.
- **Prices** – sale prices in general have remained relatively static, with over 60% of suppliers reporting no change. This split of responses has remained consistent all year.
- **Government action** – suppliers have been consistently unimpressed by the Government's energy efficiency policies, with over half (52%) of respondents rating this as ineffective or very ineffective. Opinions on overall management of the economy are less negative.

*Figures based on EEVS respondent grouping of 332 non-domestic consumers who undertook energy efficiency projects in this period (including 65 SME, 141 public sector organisations and 86 large corporate businesses).

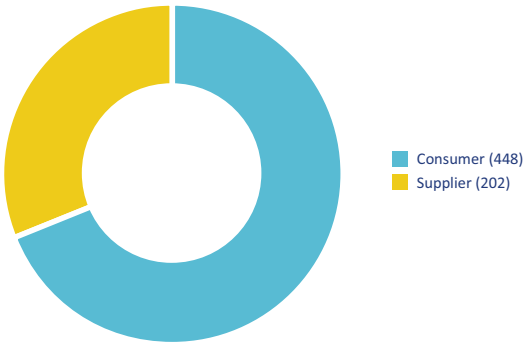
Full Results for 2012/13

The report below presents the first annual findings of the EEVS/Bloomberg *Energy Efficiency Trends* research. Our survey of non-domestic customers and suppliers of energy efficiency products and services has been carried out quarterly from September 2012 to August 2013.

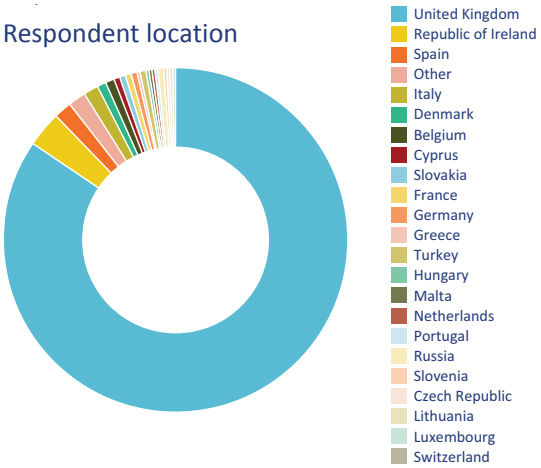
We received 650 responses in total and they are summarised below, providing a valuable Annual Performance Report for the energy efficiency sector.

Introduction

Who completed the survey in 2012/13?



Respondent location



Over the course of the year we received responses from some 448 consumers and 202 suppliers. This was mostly a UK-facing survey, although a material 15% of responses were received from a range of other countries, mainly from within the EU.

Part 1: Consumer Trends in 2012/13

This part of the report presents feedback from energy and environmental professionals within public and private sector organisations ('consumers') who are purchasing energy efficiency technologies and services on behalf of their organisations.

Sector Breakdown

Chart 1.1a – Consumers: Public Vs. Private Sectors

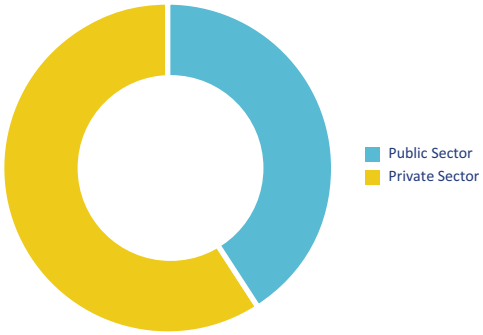


Chart 1.1b – Private Sector Consumers

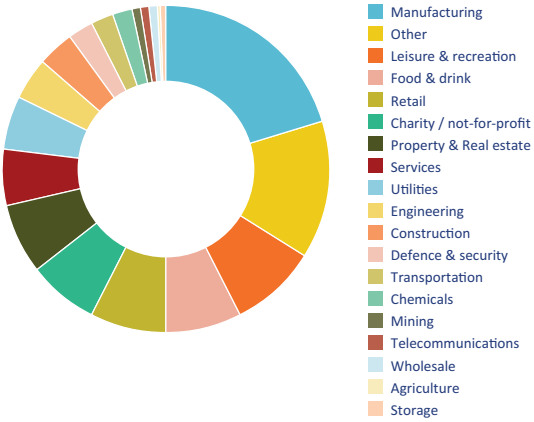


Chart 1.1c – Public Sector Consumers

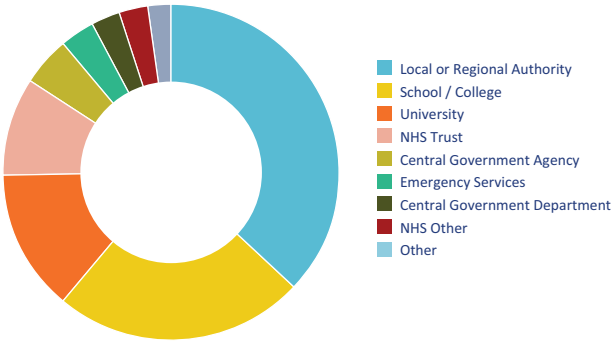


Chart 1.2 – Consumer Size (No. of Employees)

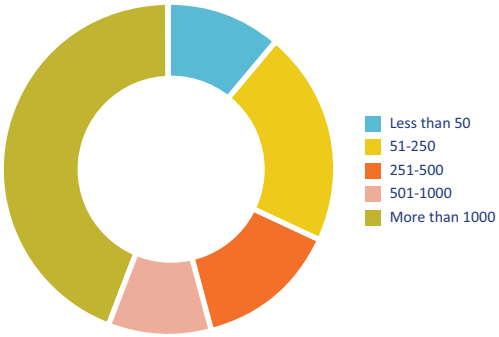


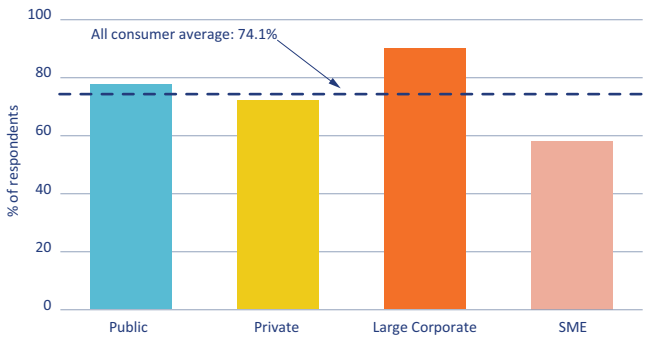
Chart 1.1a shows a broad 60-40 split between private and public sector respondents. Within these high-level sectors responses have been received from wide range of sub-sectors.

Chart 1.1b (breakdown of private sector consumers) shows that the often energy intensive manufacturing sector is leading the way. It also shows that energy efficiency is being deployed generally within a broad range of commercial sectors. Within the public sector context, **Chart 1.1c** shows that local government is the leading group and taken together the education sector (school and universities) is another key consumer group.

Chart 1.2 shows that larger organisations (with more than 1000 employees) account for almost half of respondents. As might be expected, SME respondents are fewer in number but still represent a material proportion (32%) of the overall response.

Uptake of Energy Efficiency

Chart 1.3 – Consumers commissioning energy efficiency projects in 2012/13



Technologies & Measures

Chart 1.4a – Technologies commissioned in 2012/13

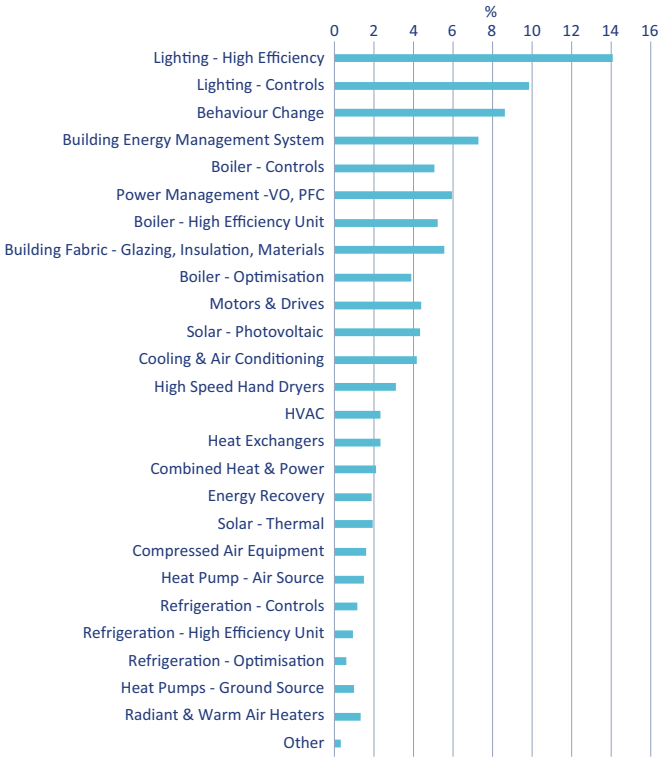


Chart 1.3 shows that within our respondent grouping the take up of energy efficiency has been strong, averaging almost 75% of respondents all year. However, within this dataset there are interesting segmented variations, for example the chart shows that large private sector corporates have been the most active and are significantly more likely than smaller corporates (i.e. SMEs) to commission projects (90% take up to 58% take up respectively).

Chart 1.4a summarises the technologies that have been commissioned in the last 12 months and their respective popularity amongst consumers. Throughout the year the focus has been very much on lighting; the installation of high efficiency units, closely followed by controls. Interestingly, non-technological (and presumably low cost) behaviour change initiatives came in third followed by a wide range of technological energy saving solutions.

Chart 1.4b – Technologies commissioned in contrasting sectors

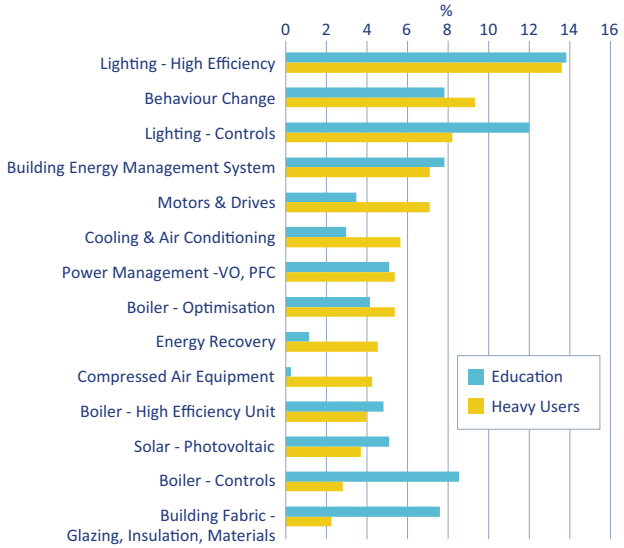


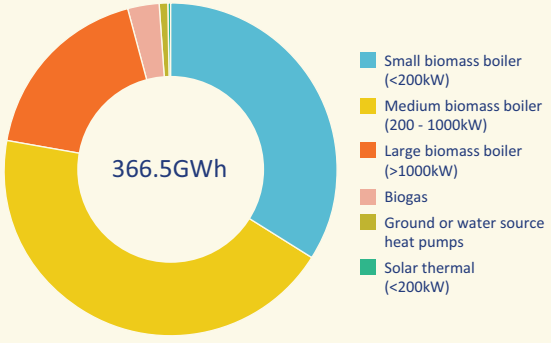
Chart 1.4b focuses on some of the most popular technologies and measures implemented by two contrasting sectors: Education and "Heavy Users" (industrial, manufacturing, data centres). As one might expect there are clear differences in the type of technology being procured; the education sector focusing on boiler and building fabric improvements, BEMS and behaviour change, while 'heavy users' were focused on improvements to motors and drives, energy recovery, cooling and compressed air. One exception is high efficiency lighting, which has proven equally popular with both segments.

Comment from Bloomberg New Energy Finance:

Developments in the Renewable Heat Incentive could favour ground-source heat pumps.

The Renewable Heat Incentive (RHI) is a government framework to support investment in technologies that deliver heat from natural sources under which building owners are paid for every kWh of renewable heat delivered. At present the RHI only applies to non-domestic buildings and has seen the installation of 429MW of eligible systems. Whilst this can be seen as a fairly positive result the scheme has only been successful in encouraging uptake of biomass boilers, which account for almost all of the payments made to date. This may change in the 2014/15 period. Firstly, current government proposals suggest that the tariff for ground and water source heat pumps will be approximately doubled when tariff levels are re-set for individual technologies. Secondly, the tariff levels for the forthcoming domestic RHI were announced in July and our analysis suggests that the economics are particularly favourable for biomass boilers and ground-source heat pumps, which have played a relatively minor role in the Renewable Heat Premium Payment scheme that the domestic RHI is set to replace. It could be an interesting few years for the heat pump market in that regard.

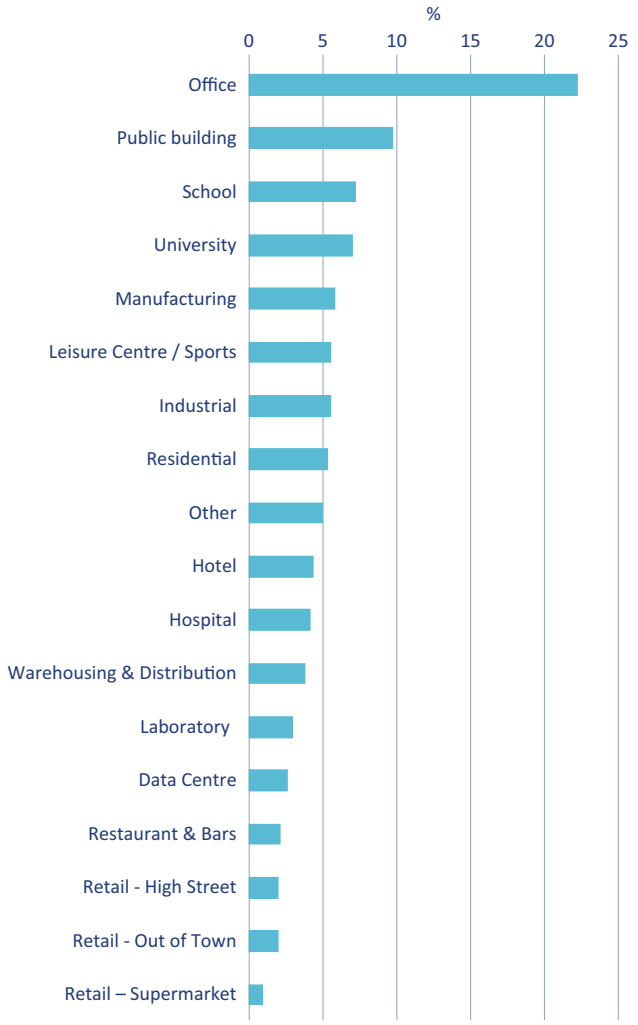
Chart 1.4c Heat generated by technology type under the non-domestic RHI (November 2011-July 2013)



Source: DECC, Bloomberg New Energy Finance

Property Types

Chart 1.5 – Energy efficiency retrofit by property type in 2012/13



Project Costs

Chart 1.6 – Capital cost of energy efficiency projects in 2012/13

Chart 1.5 shows that a wide range of property types have benefited from energy efficiency improvements, although offices have been by far the most retrofitted property type, representing almost 1 in 4 deployments. A significant volume of public buildings and leisure facilities have also received upgrades, whilst the strong interest from Education and Manufacturing (see Charts 1.1, page 6) is also reflected here.

Chart 1.6 shows a broadly even spread of project costs, with respondent spend ranging from under £10,000 to more than £500,000. As shown above, the interest in energy efficiency from large corporates and public sector organisations perhaps explains the strong uptake in higher cost projects, while slower uptake of (smaller) energy efficiency projects by more numerous SMEs may explain a flat across-the-board trend in project costs.

Comment from Bloomberg New Energy Finance:

A view from the States: Property Assessed Clean Energy (PACE)

Property Assessed Clean Energy (PACE) is a framework that has emerged for financing energy efficiency in the United States that bears certain similarities with the UK's Green Deal. Like the Green Deal loans are provided for energy efficiency on the basis of the expected savings exceeding the monthly repayments. The key difference is that where under the Green Deal repayments are made through a property's energy bill, PACE repayments appear as an additional line on a building's property tax bill. Thus under PACE the local government plays a similar role to the energy supplier in the Green Deal. The outcome of PACE, similar to the Green Deal, is that the debt is repaid by the beneficiary of the building improvement (i.e. the occupier) and that the debt is attached to the property rather than the property owner.

For those that feel that the Green Deal's cool reception proves that the concept is unworkable, the history of PACE should prove an informative counterpoint. PACE which was originally developed in 2008 primarily with residential buildings in mind, was almost completely derailed in 2010 when the federal agencies that back the vast majority of US residential mortgages issued statement's saying that they would not buy mortgages that were subject to PACE agreements. They argued that PACE debt reduced a building's value, irrespective of the implicit value of improved energy performance. Various legal challenges, still continuing to this day, were made by stakeholders interested in the success of PACE, but the majority of PACE programs were either suspended or abandoned.

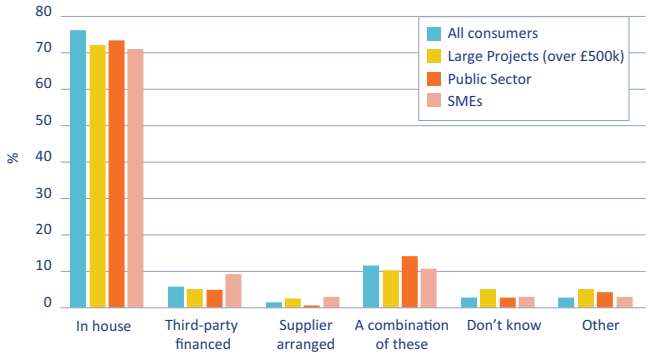
This may have spelt the end for PACE but it did not. The structure of the US commercial mortgage market is different from the residential market and many of the problems that applied to residential PACE did not apply to commercial PACE. Thus local governments, particularly in California and Connecticut began to introduce commercial PACE programs. Moreover Maine and Vermont introduced legislation that re-hashed PACE to make it more palatable to residential mortgage providers.

It is still early days for the re-emergence of PACE – to date PACE financing, which relies on local governments to introduce programs, is only available to around 10% of US property owners, most of them in California. However the early signs are positive – for example Sonoma County, which has a population of just 490,000, has seen around $60m invested through its commercial PACE program and there is increasing momentum for PACE across the country.

The rocky start and then re-emergence of PACE may serve as a positive reminder for critics of the Green Deal that its success or failure as a concept should not be judged too quickly.

Project Finance

Chart 1.7 – Finance models for energy efficiency in 2012/13



Financial Payback

Chart 1.8 – Expected payback period for energy efficiency in 2012/13

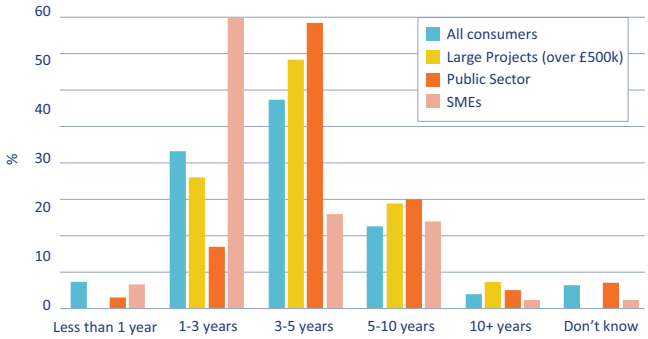


Chart 1.7 shows a strong trend for organisations to finance energy efficiency from their own CAPEX budgets during 2012/13, rather than seek funding from the capital markets. While this general trend is to be expected, it is striking that finance from banks and other financial institutions has been largely unused (by a range of organisation types) during the period.

Chart 1.8 summarises the financial expectations for energy efficiency investments. In this Annual Report we've focused on three discrete consumer categories with clear differences in expectation; public sector organisations, large corporates and SMEs. Most notable is the SME expectation for a short payback of 3 years or less (62% of consumers) and how this contrasts with the public sector (only 14% expect projects to payback in this timescale). For larger corporates and the public sector the general expectation is for projects to payback in 3-5 years. The bars then start to tail off, with only a handful of organisations implementing projects where the payback horizon is 10 years or more.

Measurement & Verification

Chart 1.9 – Use of good practice measurement and verification for energy efficiency projects in 2012/13

Consumers not undertaking energy efficiency

Chart 1.10 – Reasons for not undertaking energy efficiency in 2012/13

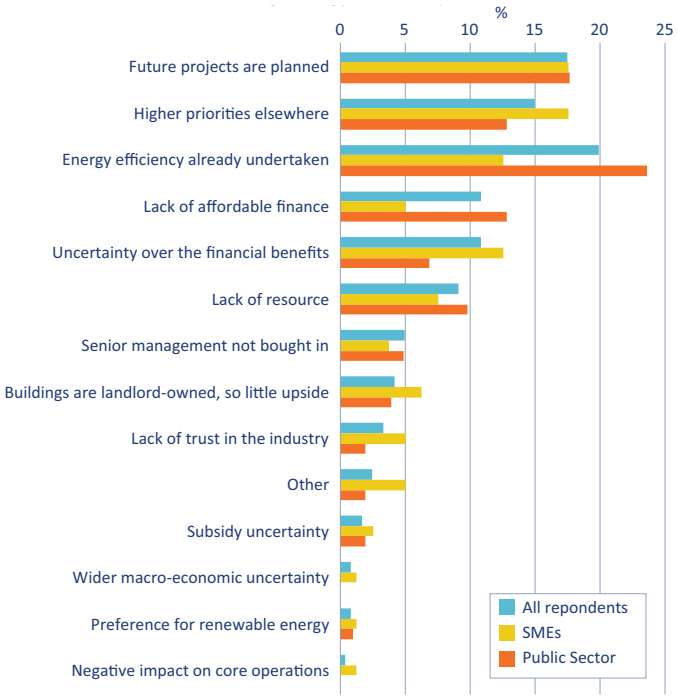


Chart 1.9 summarises consumer use of performance measurement in relation to energy efficiency projects in 2012/13 i.e. evaluating how much energy (and cost) an energy efficiency project has saved. The chart shows that in general terms project performance is still largely unmeasured to a recognised standard (e.g. IPMVP) and that while performance measurement and/or verification does increase with project size, over half of the very largest investments (£500,000+) still have no recognised process in place to measure performance i.e. whether the investment delivered the savings and value for money that was expected.

Chart 1.10 shows no stand-out reasons for organisations not having undertaken energy saving projects in the last 12 months. Almost 1 in 4 public sector respondents considered that projects had already been undertaken, and one feedback submission from the latest quarterly survey (see results below) reported that the team was focusing on ensuring the success of existing projects, rather than taking on new ones. Interestingly, a lack of affordable finance was not flagged as a major reason for not undertaking energy efficiency by any segment.

Part 2: Supplier Trends in Energy Efficiency in 2012/13

This section of the report presents the survey finding for the supply-side of the industry (organisations delivering the broad range of building-related energy efficiency technologies, measures and services to the non-domestic market). The survey was completed by 202 supplier organisations across the previous 4 quarters.

Sector Breakdown

Chart 2.1 – Breakdown by Supplier Type in 2012/13

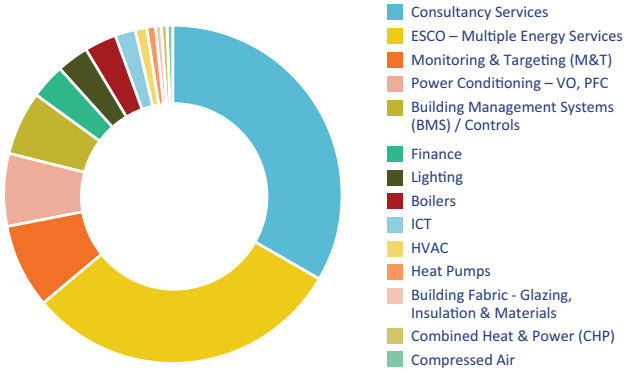


Chart 2.2 – Organisation Size (No. of employees) in 2012/13

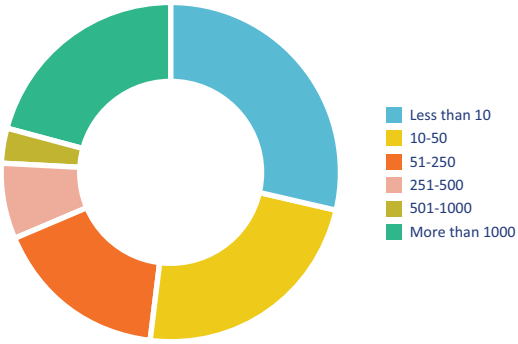
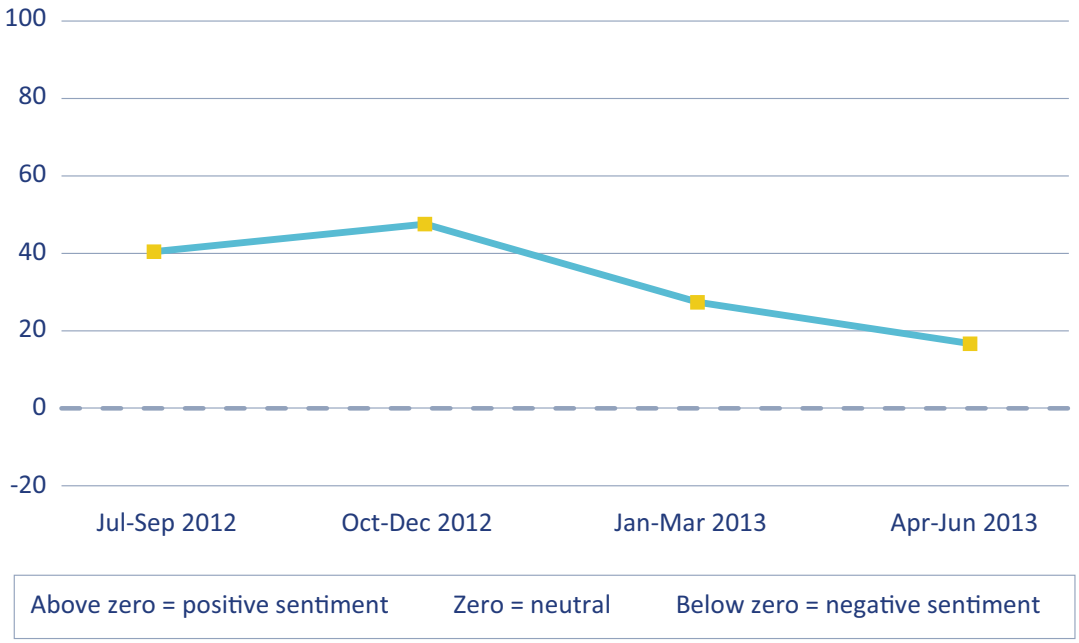


Chart 2.1 shows that the supplier responses in 2012/13 (202 in total) were largely made up of consultancies and ESCOs (combined 64% of respondents). It may be inferred from this that consumers prefer providers capable of supplying a broad range of energy solutions, rather than individual technologies.

Chart 2.2 shows that almost three-quarters of supplier organisations were SMEs with fewer than 250 employees, almost 1 in 3 reporting that they were 'micro' SMEs with less than 10 employees. At the other end of the scale, a material 20% of respondents were from very large organisations with over 1000 staff.

Market Monitor - Tracking industry confidence

This first EEVS/Bloomberg Energy Efficiency Supplier Confidence Indicator (EESCI) shows that industry confidence has remained positive throughout the 2012/13 period, but that this has waned slightly during 2013. On investigation we found that this was principally due to reduced optimism around staffing levels (lack of growth) and government energy policy (less supportive). Overall, we class the current score of 17 as 'cautious and modest optimism' within the industry. It will be interesting to see which way EESCI moves in the next 12 months, especially within the context of the reported economic recovery.



A new and valuable addition to the research, the EEVS/Bloomberg Supplier Confidence Indicator brings together responses to questions 2.3 to 2.6 (order volumes, staffing levels and sale prices) and 2.8 (government action) to form a composite and balanced measure of industry confidence or 'sentiment'. The results have been calculated for each quarter of the past year and the trend can be observed in the chart above.

In headline, a score above zero indicates positive sentiment, or confidence, within the supply side of industry; a negative score indicates a negative sentiment or apprehension within the industry (for example, if every respondent answered every question with a 'neutral' response the overall Indicator score would be zero). For more information on the calculations and weightings used, please contact Nick Gregori at EEVS **nicholas@eevs.co.uk**.

The Order Book

Chart 2.3 – Orders received from national customers in 2012/13

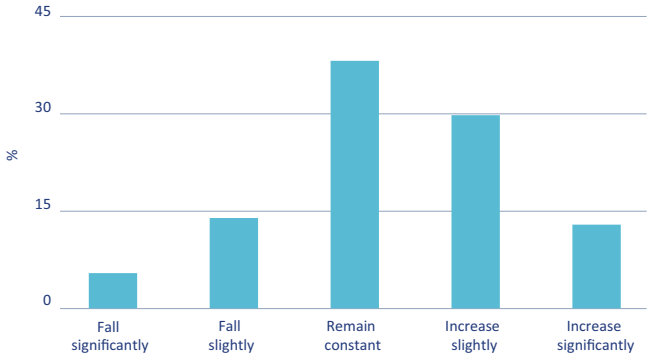
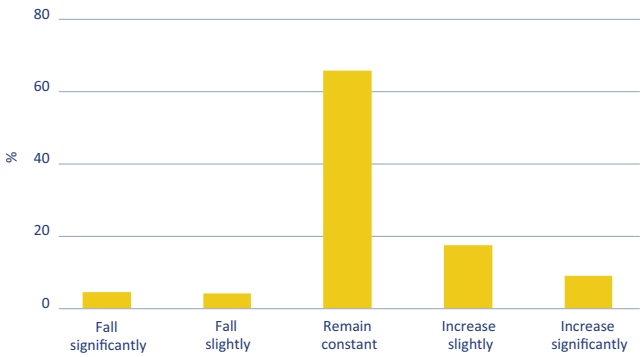
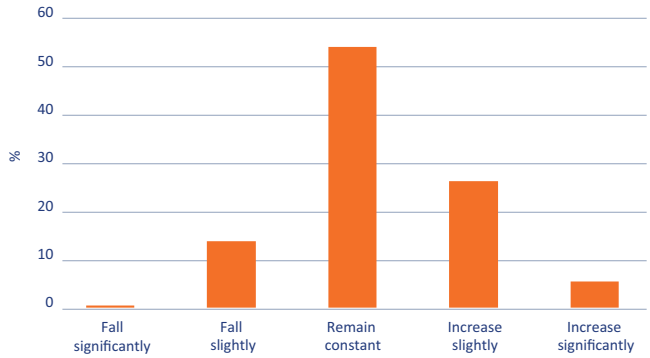


Chart 2.4 – Orders received from overseas customers in 2012/13



Staff Numbers

Chart 2.5 – Staffing trends in the energy efficiency sector in 2012/13

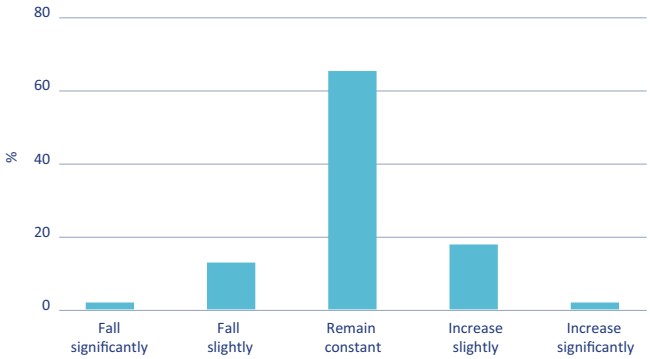


Although suppliers generally considered that orders had remained constant during 2012/13, both **Charts 2.3** and **2.4** show that, on balance, more suppliers were reporting growing order books– pointing to a modest sense of optimism within the industry.

A similar trend is observed in **Chart 2.5**, with staff numbers at a majority of supplier organisations remaining static. The remainder of the industry has tended towards a slight increase in headcount.

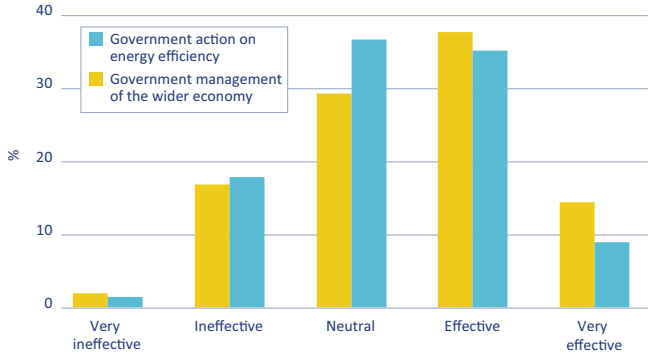
Sale Prices

Chart 2.6 – Sale price trends in 2012/13



Government Effectiveness

Chart 2.8 – Industry views on Government energy efficiency policy & management of the wider economy in 2012/13



Industry Risk

Chart 2.7 – Key issues of concern to the industry

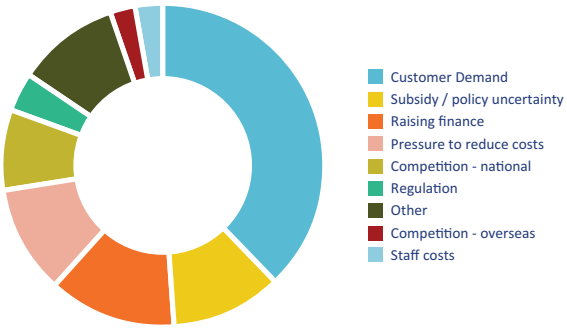


Chart 2.6 shows that suppliers are not reporting large variations in sale prices – over 60% of responses being 'Remain Constant'. This lack of opportunity for price inflation appears to reflect the state of the wider economy, with a general focus on controlling supplier costs.

Chart 2.7 highlights that 'Customer Demand' was the key issue of concern during 2012/13. The latest quarterly results (see below) report the same trend. There is a relatively equal spread between the other responses with no clear additional trends to report.

Chart 2.8 shows that the industry's assessment of Government action in 2012/13 has tended to be negative, and that this is even more pronounced in relation to energy policy. These findings appear to correspond well with the lukewarm media and industry reaction to Government outputs, such as the Green Deal and the Energy Bill.

Comment from Bloomberg New Energy Finance:

Deadline looms for EU member state compliance in EED Article 7

For us one of the big stories globally in energy efficiency is the EU's Energy Efficiency Directive (EED). Although the EED was adopted back in October 2012 the real action will be between now and 30 June 2014, the deadline for member states to have transposed the directive into national law. Of particular interest is how member states plan to comply with Article 7 – which requires the creation of national Energy Efficiency Obligation Schemes (EEOS) for energy suppliers or network operators – details of which are to be submitted to the European Commission by 5 December.

In the UK there is already an existing EEOS, the Energy Company Obligation (ECO) which channels approximately £1bn of investment from energy companies into energy efficiency each year. We should not discount the possibility that ECO will need to be adapted to bring it in line with EU requirements but there is at least an existing framework for such a scheme. Other countries that have made a head start in this regard are France, Italy, Poland, Denmark, Austria, Ireland and Bulgaria.

The biggest open question is currently how Germany, as Europe's largest energy consumer, will comply with Article 7. There is provision within the directive to allow countries to adopt alternatives to an EEOS so long as they are equivalent or greater in impact and there has been some suggestion that Germany will comply by increasing the level of lending by the government-controlled bank KfW into residential energy efficiency. Last year EUR4.3bn was invested in residential retrofits through the scheme, so it would not be surprising if the German government would want to build on its success.

More clarity will emerge in the coming months.

Energy Efficiency Trends Quarter 2 2013 Results

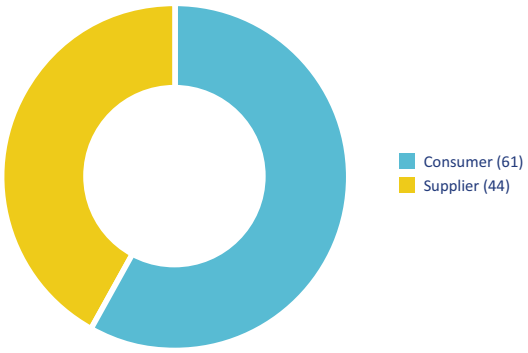
Quarter 2 Results (1 April to 30 June)

This section below summarises the regular *quarterly* survey results, for the second quarter of 2013.

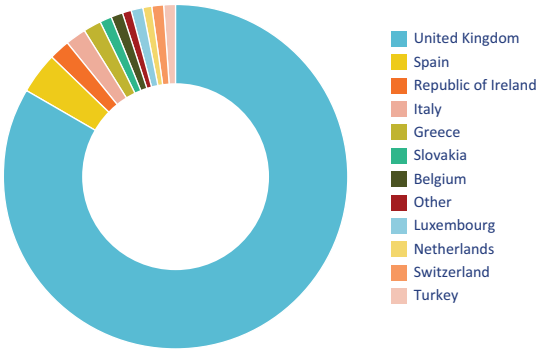
The survey was undertaken during July and August and was completed by 105 respondents.

Introduction

Who completed the survey?



Respondent location

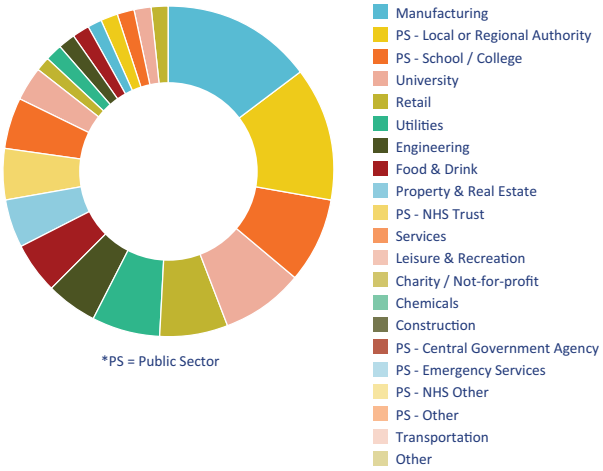


Part 1: Consumer Trends in Energy Efficiency

This part of the report presents feedback from energy and environmental professionals within public and private sector organisations ('consumers') who are purchasing energy efficiency technologies and services on behalf of their organisations.

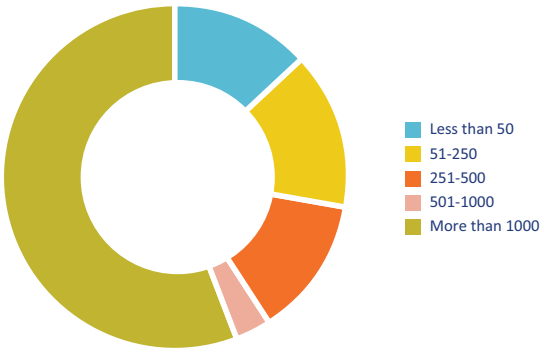
Sector Breakdown

Chart 1.1 – Consumers by Sector



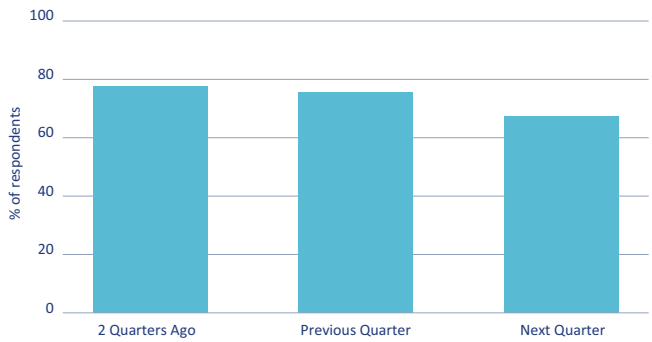
*PS = Public Sector

Chart 1.2 – Consumer Size (No. of Employees)



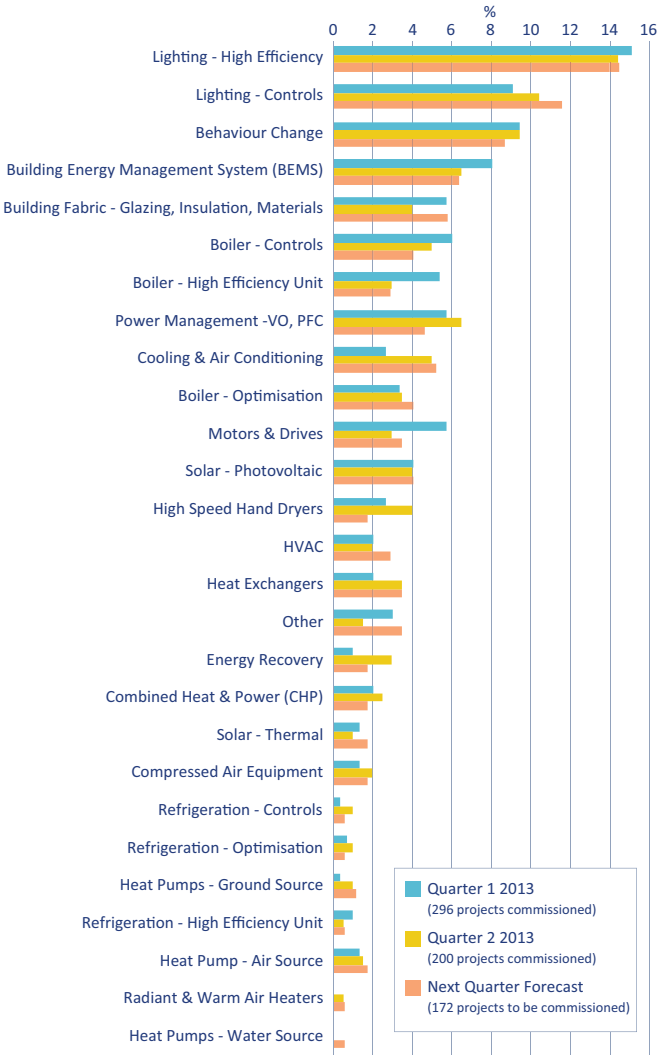
Uptake of Energy Efficiency

Chart 1.3 – Consumers commissioning energy efficiency projects



Technologies & Measures

Chart 1.4 – Technologies commissioned

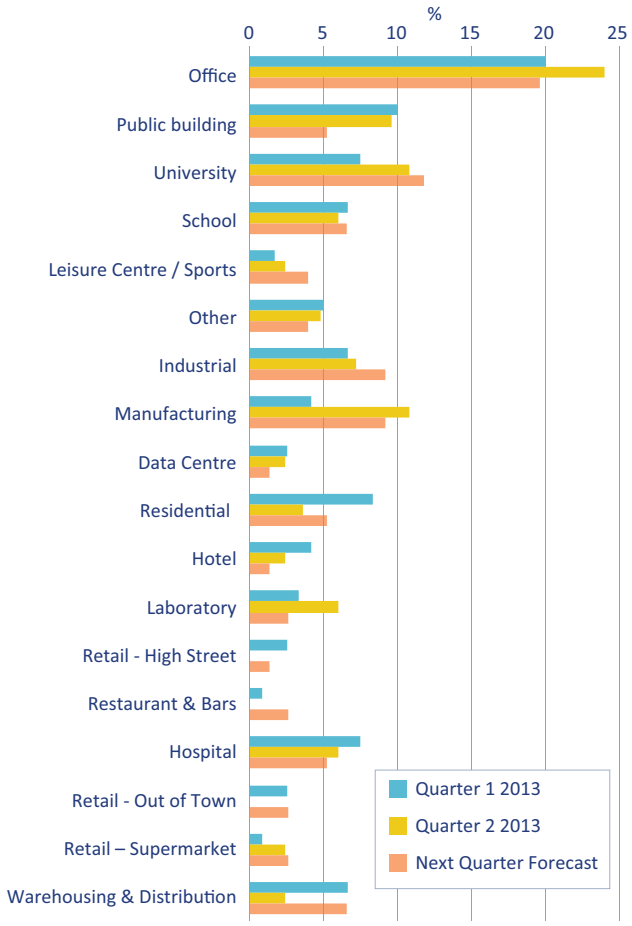


Others mentioned by respondents (1.4):

'kilns and ovens', 'smart metering', 'biomass heating', 'process chiller', 'replacing refrigeration with forced air ventilation for equipment cooling'

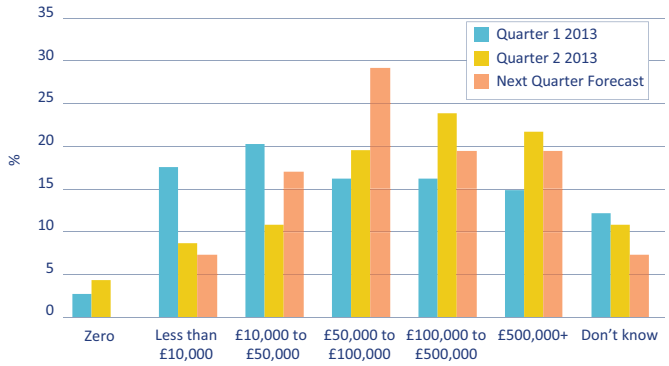
Property Types

Chart 1.5 – Energy efficiency retrofit by property type



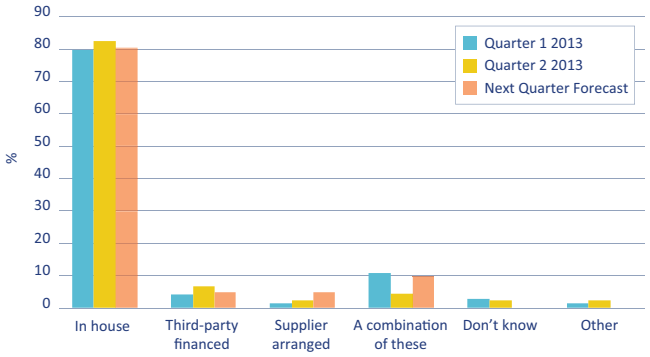
Project Costs

Chart 1.6 – Capital cost of energy efficiency projects



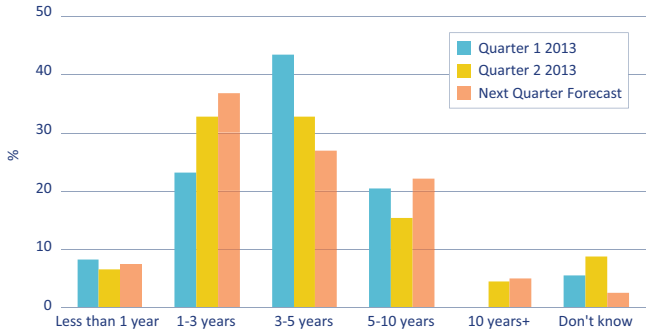
Project Finance

Chart 1.7 – Finance models for energy efficiency



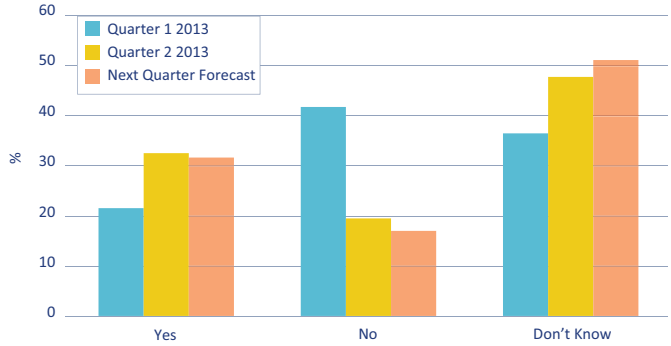
Financial Payback

Chart 1.8 – Expected payback period for energy efficiency



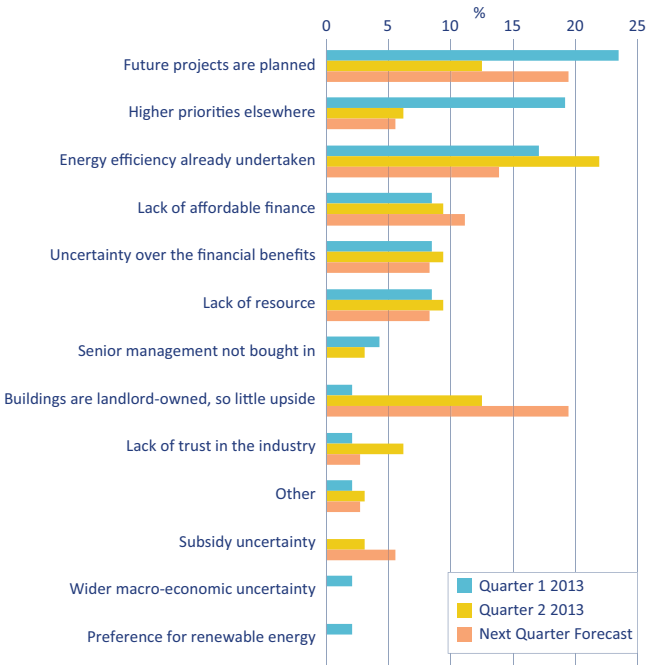
Measurement & Verification

Chart 1.9 – Use of good practice Measurement & Verification for energy efficiency projects



Consumers not undertaking energy efficiency

Chart 1.10 – Reasons for not undertaking energy efficiency



Other stated reasons (1.10):

'To ensure the installation and success of current projects'

Part 2: Supplier Trends in Energy Efficiency

This section of the report presents the findings for the supply-side of the industry (organisations delivering the broad range of building-related energy efficiency technologies, measures and services to the non-domestic market). The survey was completed by 44 supplier organisations.

Sector Breakdown

Chart 2.1 – Breakdown by Supplier Type

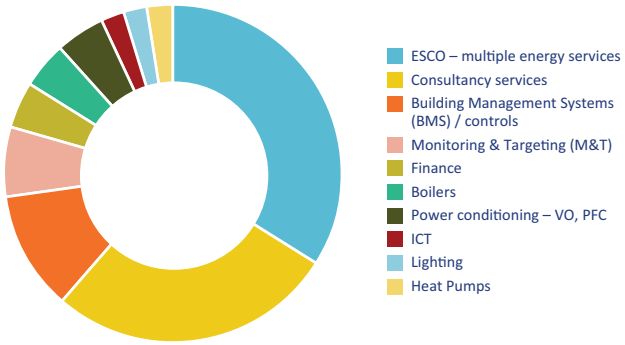
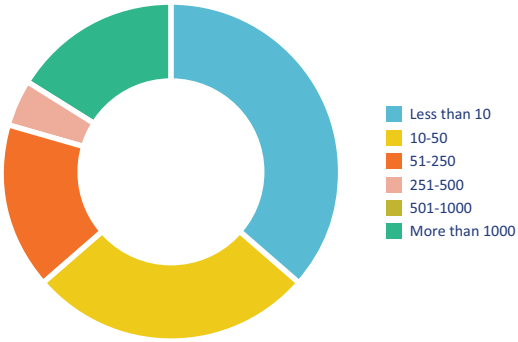


Chart 2.2 – Organisation Size (No. of employees)



The Order Book

Chart 2.3 – Orders received from national customers

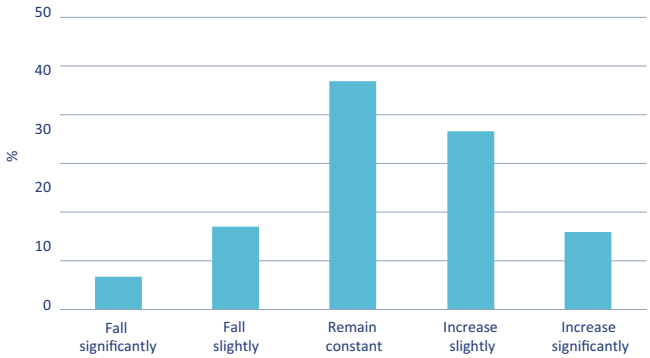
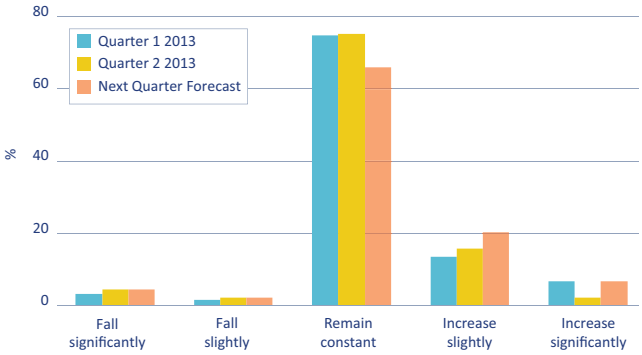
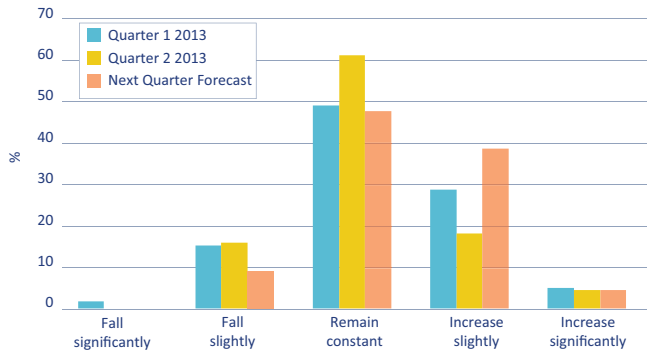


Chart 2.4 – Orders received from overseas customers



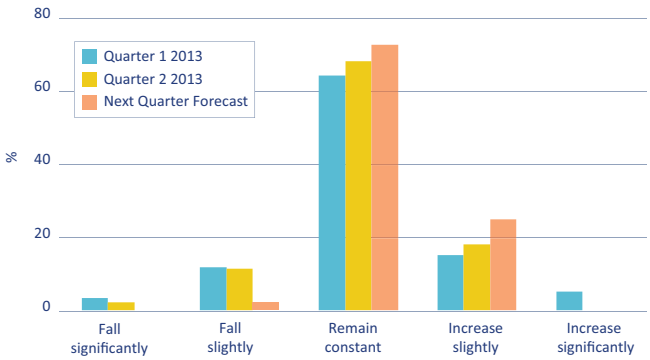
Staff Numbers

Chart 2.5 – Staffing trends in the energy efficiency sector



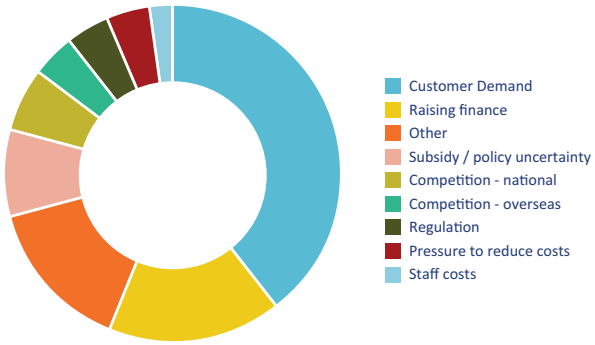
Sale Prices

Chart 2.6 – Sale prices achieved



Industry Risk

Chart 2.7 – Key issues of concern to the industry

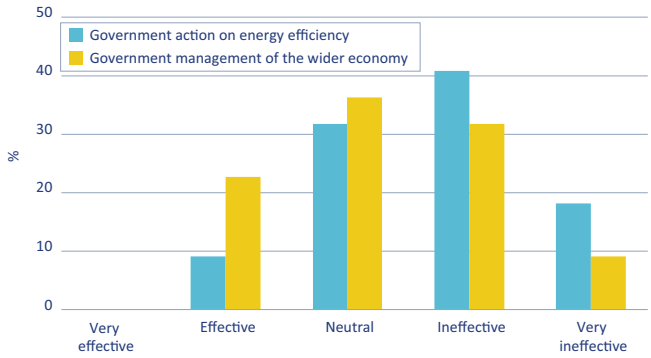


Other concerns raised by supplier respondents (2.7):

'Slow decision making by customers', 'Customer decision making time', 'Customer Understanding of Model', 'Government's lack of concerted action is holding back the industry', 'End user barriers - business as usual [means energy is not the most pressing challenge]', 'Client funding / capital constraints', 'Lack of understanding of legislation and energy policy by customers'

Government Effectiveness

Chart 2.8 – Industry views on Government energy efficiency policy & management of the wider economy



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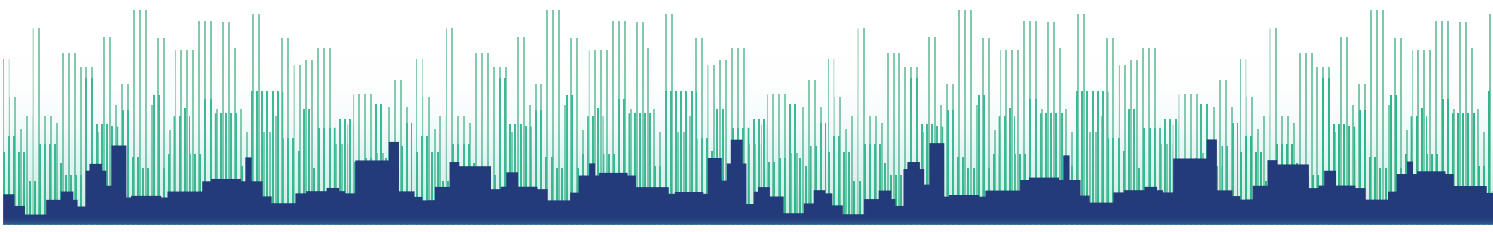
...or get in touch with Ian Jeffries:
ian@eevs.co.uk



Contact Us

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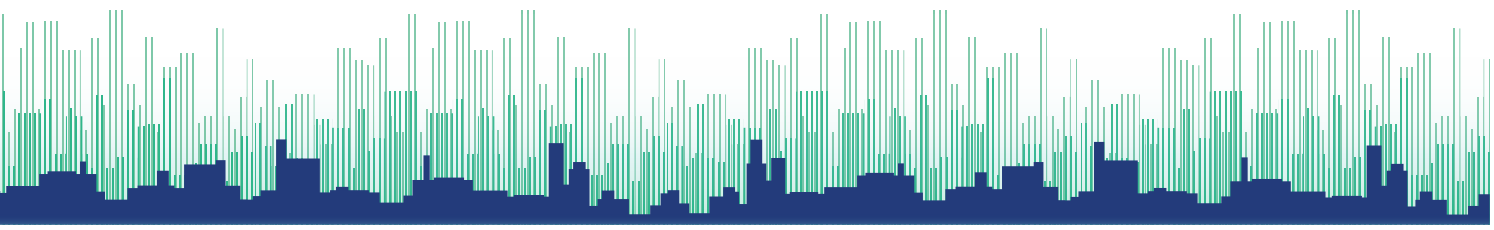
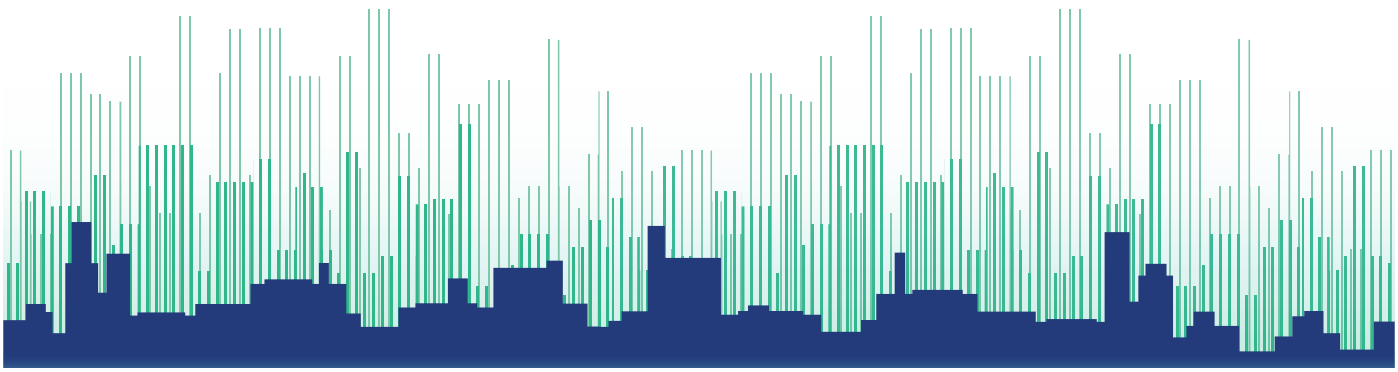


Energy Efficiency Trends Annual Report 2012/13

Essential insight for consumers and suppliers of non-domestic energy efficiency



September 2013