



Federal Office  
for Economic Affairs  
and Export Control



# The German Energy Services Market

„Bestandsaufnahme des deutschen Energieeffizienzmarktes und Ausblick“

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<http://www.bafa.de/>



## Federal Energy Efficiency Center

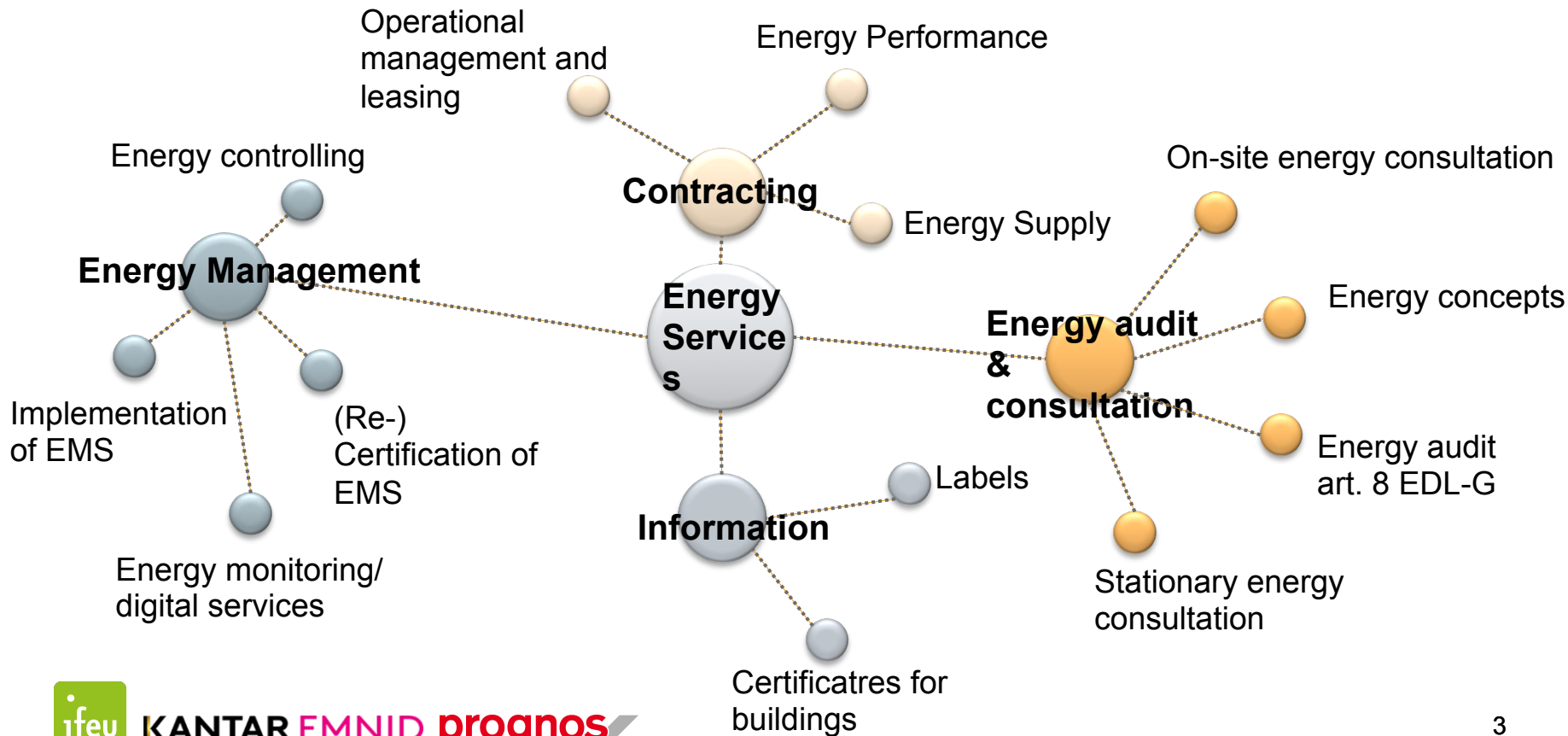
Tasks defined by the German Energy Efficiency Services Act (last amended in 2020)

- scientific support to the Federal Ministry for Economic Affairs and Climate Action (BMWK) in all fields of energy efficiency
- monitoring the market for energy efficiency services
- support (further) development of energy efficiency measures
- provide information and increase transparency in the market

<https://www.bfee-online.de/>



# Empirical Analysis of the Market for Energy Services, Energy Audits and other Energy Efficiency Measures



## Scope of the study 2021

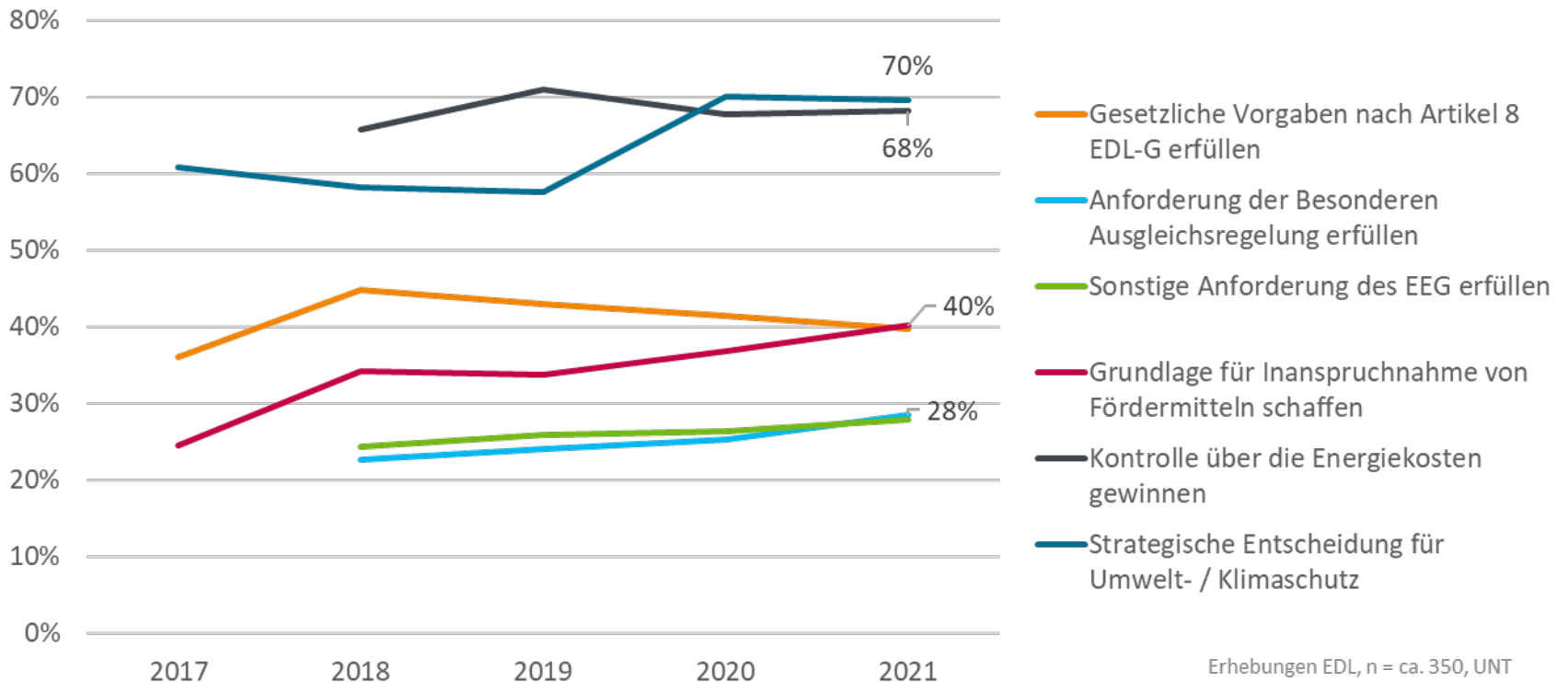
	Sample size	Target group
<b>Supply side</b>		
Providers (telephone-based interviews)	264	Utilities, Technology providers, Contractors, Energy auditors, Energy management
Providers (online based interviews)	1,399	Active Energy consultants and auditors
	113	Other Energy consultants and auditors
<b>Demand side</b>		
Commercial sector (telephone-based interviews)	2,221	SMEs
	531	Non-SMEs
Private households (telephone-based interviews)	1,605	Owners
	1,013	Tenants
Public sector (telephone and online based interviews)	504	federal government, state governments, and local authorities

## Market volume overview

All approx. (in €)	2015	2016	2017	2018	2019	2020
Energy consulting	470–520 m	790–850 m	370–402 m	360–403 m	416 m	654 m
Energy contracting	7.2–8.4 bn	7.7 bn	7.2–8.6 bn	6.7–9.7 bn	7.4–9.0 bn	9.6–12.2 bn
Energy management	-	107 m	110 m	99 m	88 m	96 m
Total energy services market	7.9–9.1 bn	8.9–9.0 bn	8.0–9.5 bn	7.2–10.2 bn	7.9–9.5 bn	10.3–12.9 bn



## Main drivers for companies to deal with energy efficiency measures

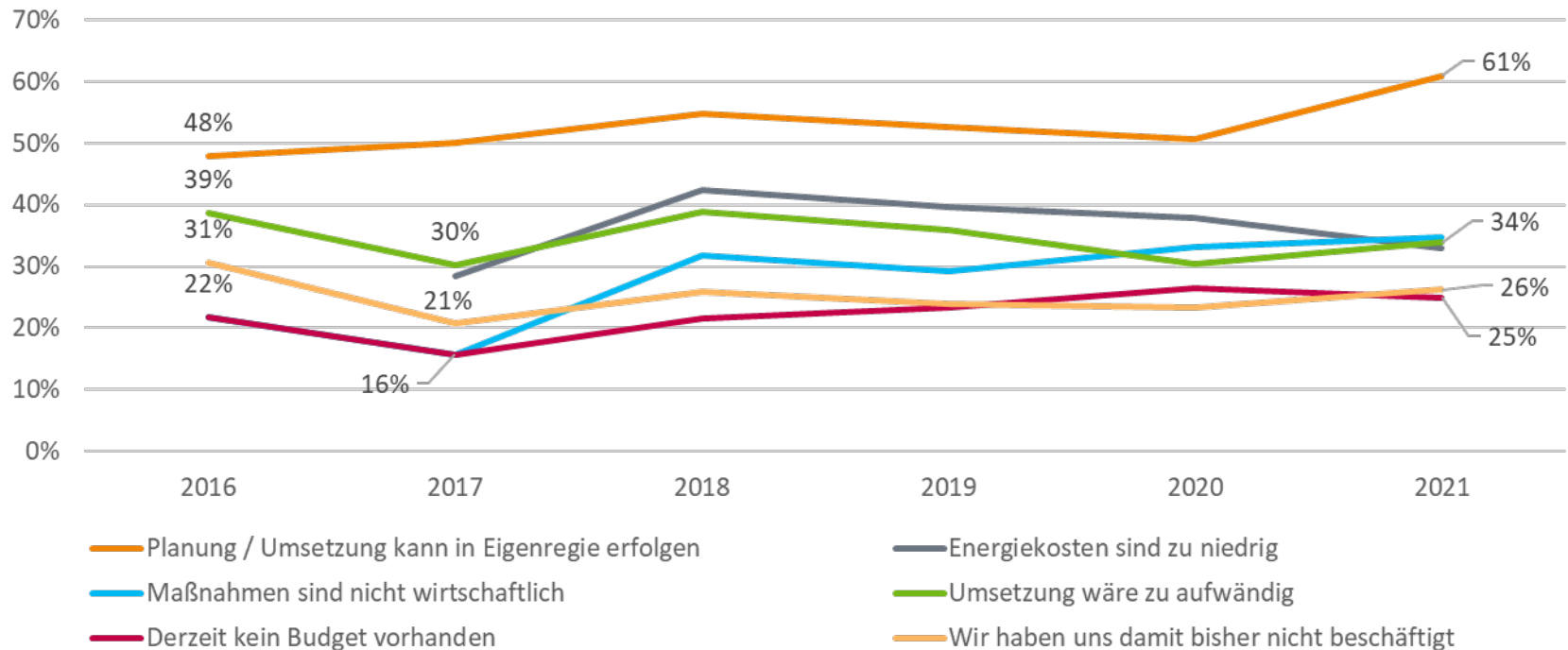


Erhebungen EDL, n = ca. 350, UNT

EES survey 2017-2021, companies



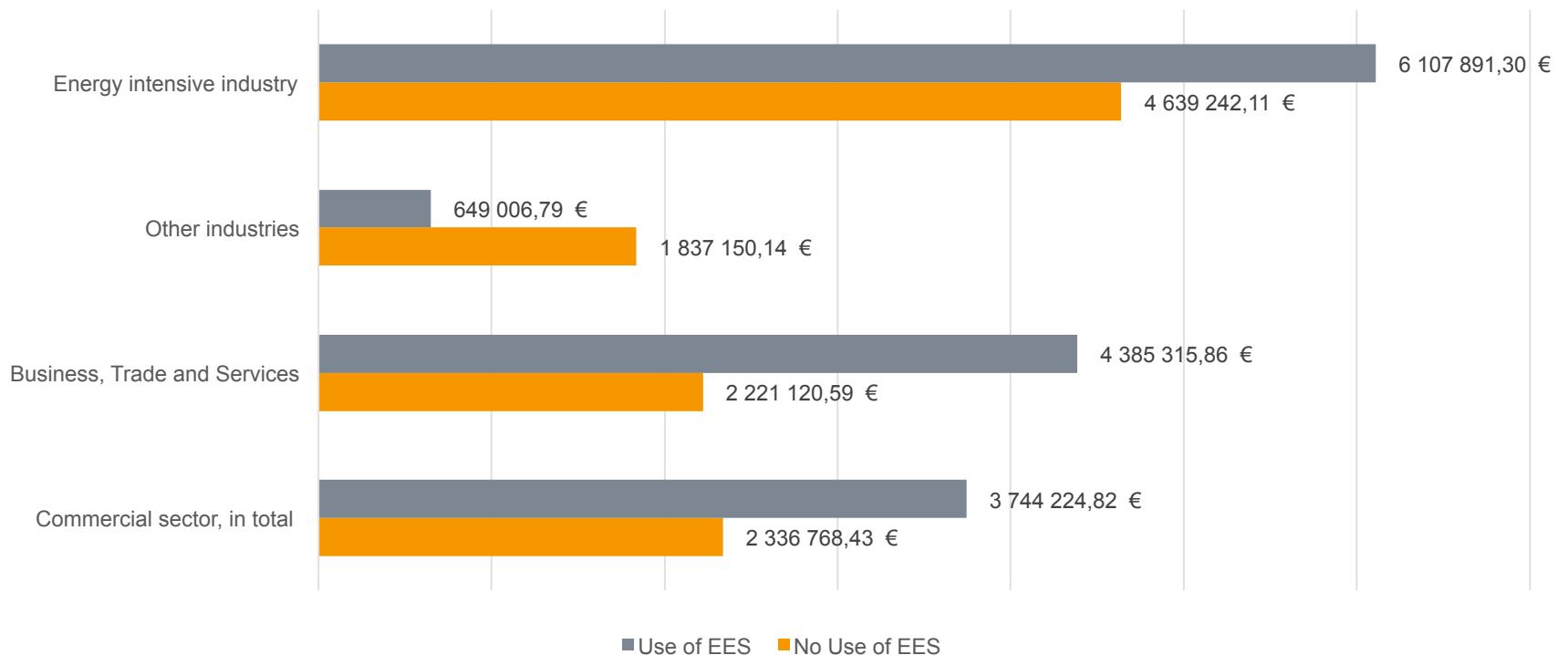
## Barriers to the use of EES



Erhebung EDL 2016-2021, Unternehmen

EES survey 2016-2021, companies

## Use of EES and average investments in increasing energy efficiency

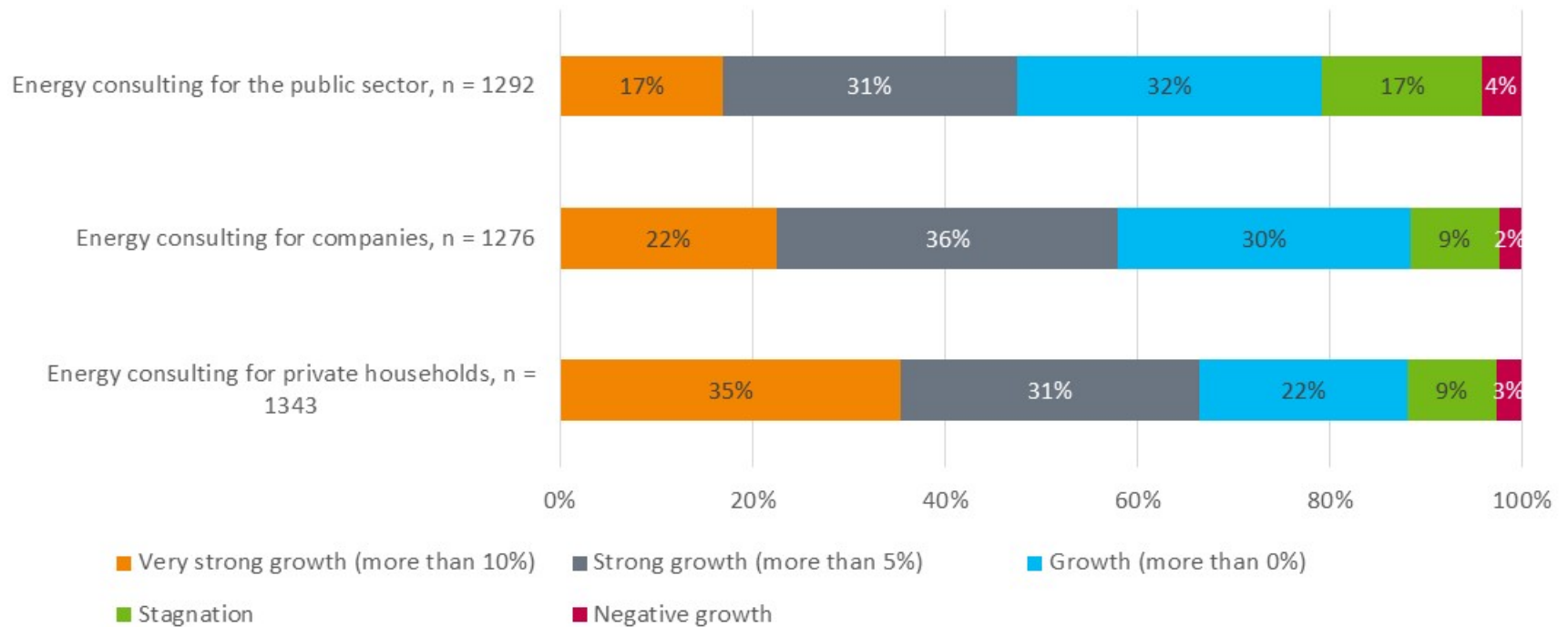


EES survey 2021, companies



## The market for energy consulting and audits

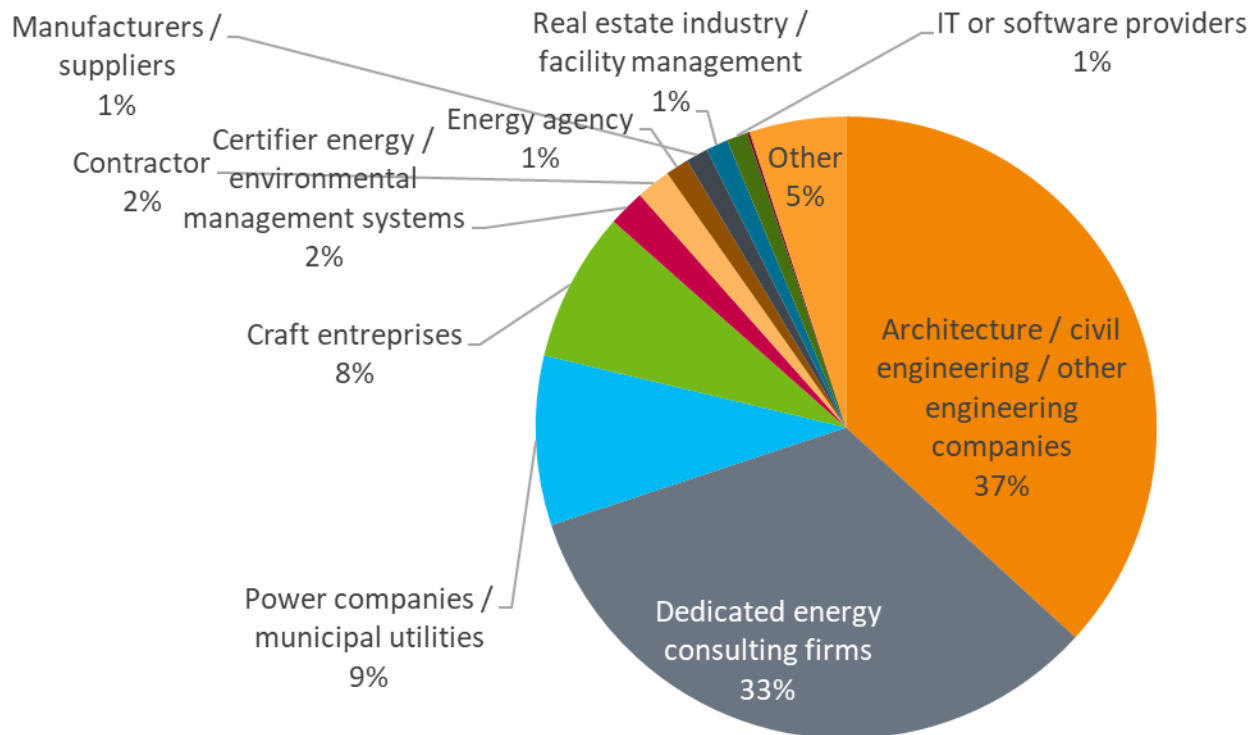
### Assessment of market development for energy consulting by target group



EES survey 2021, Providers offering energy consulting services

## The market for energy consulting and audits

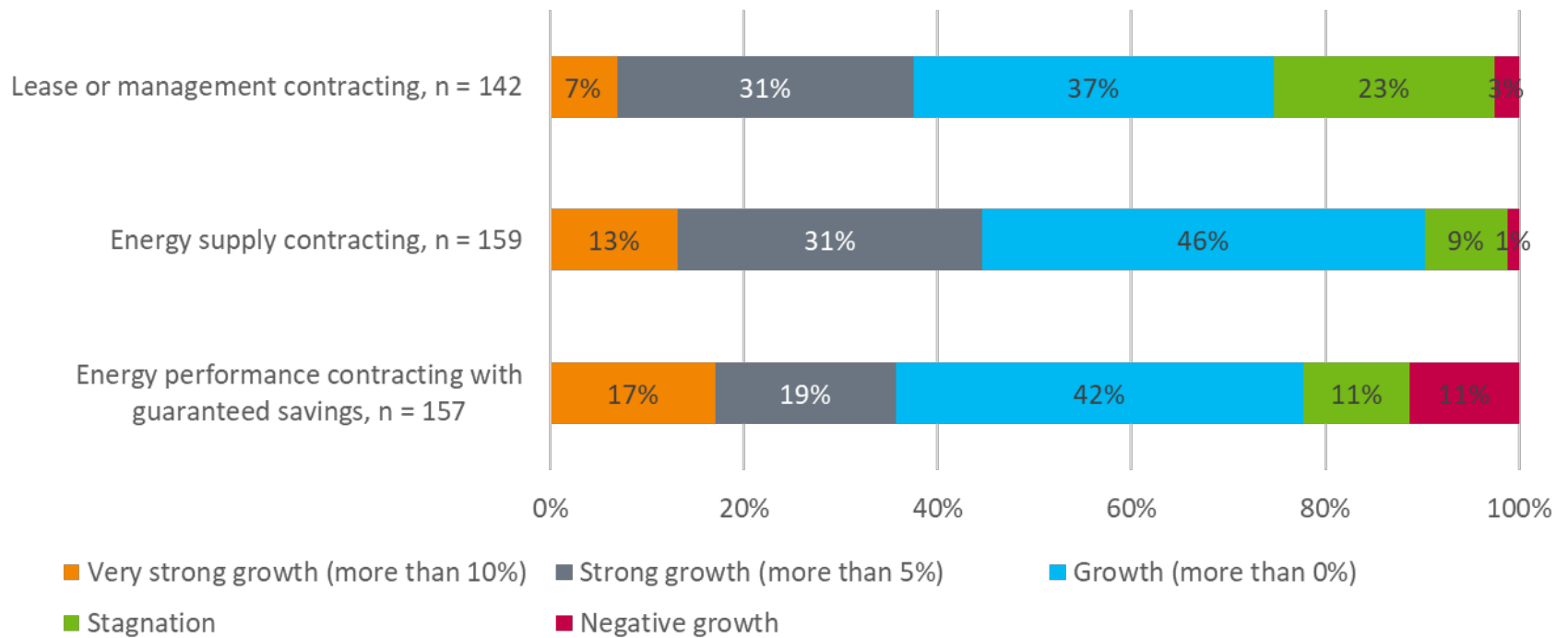
### Market structure of energy consulting providers



EES survey 2021, providers of energy, n=1566

## The market for energy contracting

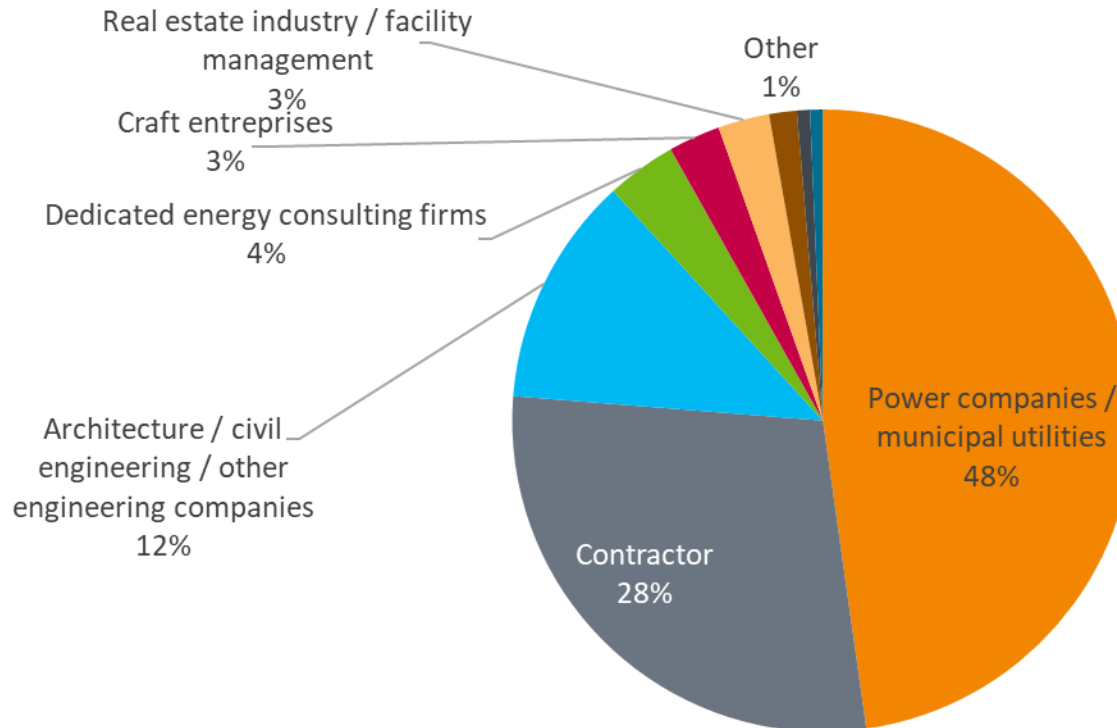
### Assessment of market development by type of contracting contract



EES survey 2021, Providers offering energy contracting

## The market for energy contracting

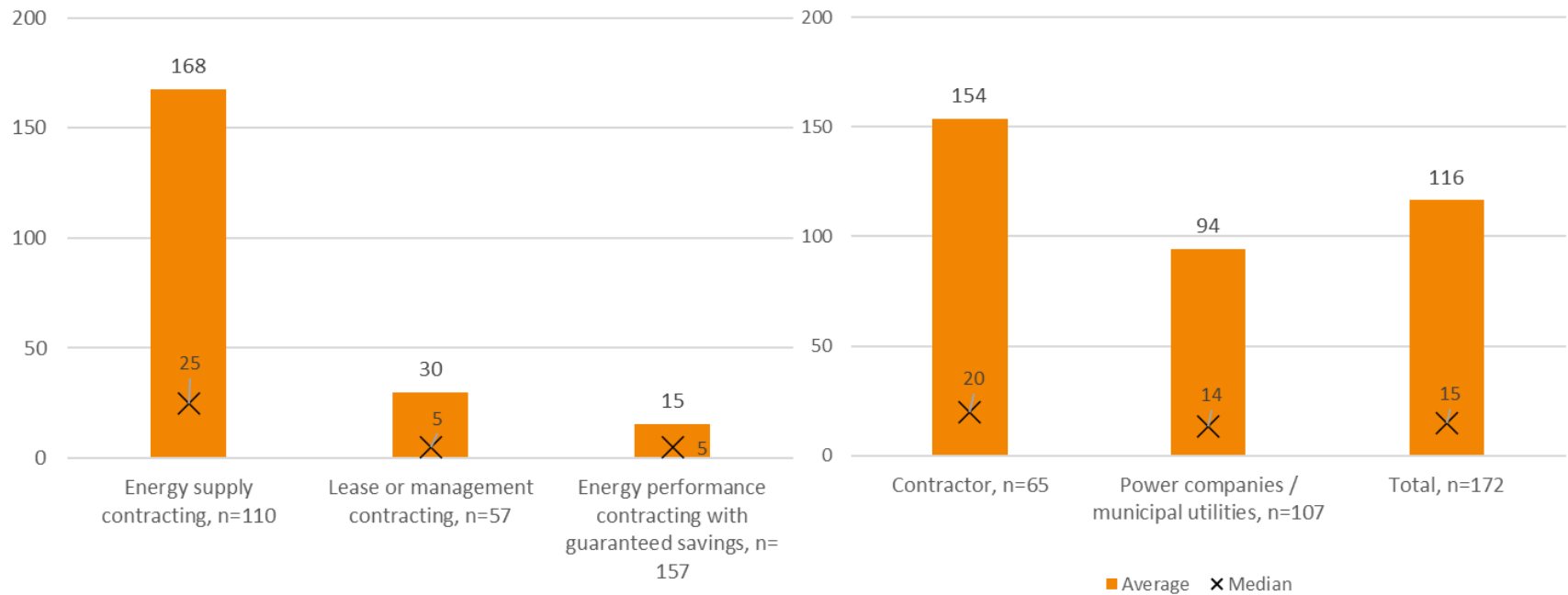
### Market structure of energy contracting providers



EES survey 2021, providers of energy contracting, n=184

## The market for energy contracting

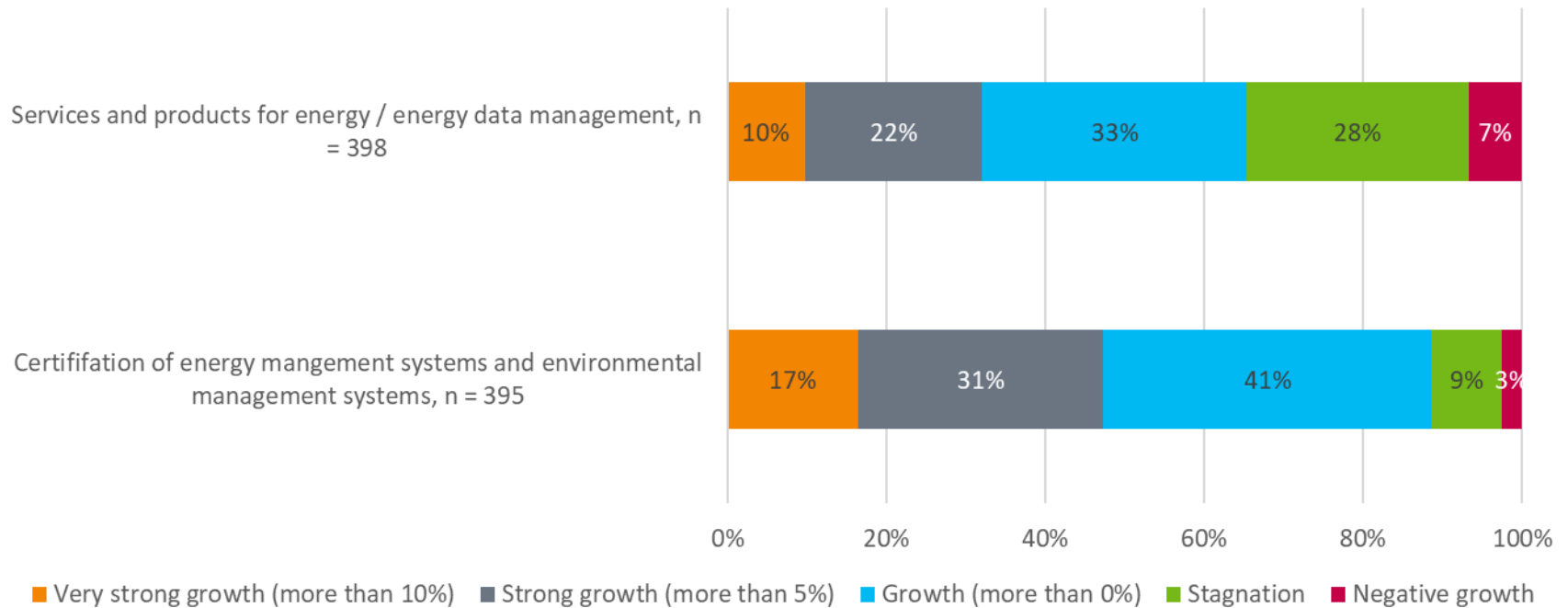
Average number of ongoing contracts per provider and provider group



EES survey 2021, providers of energy contracting, n = 172

## The market for energy management

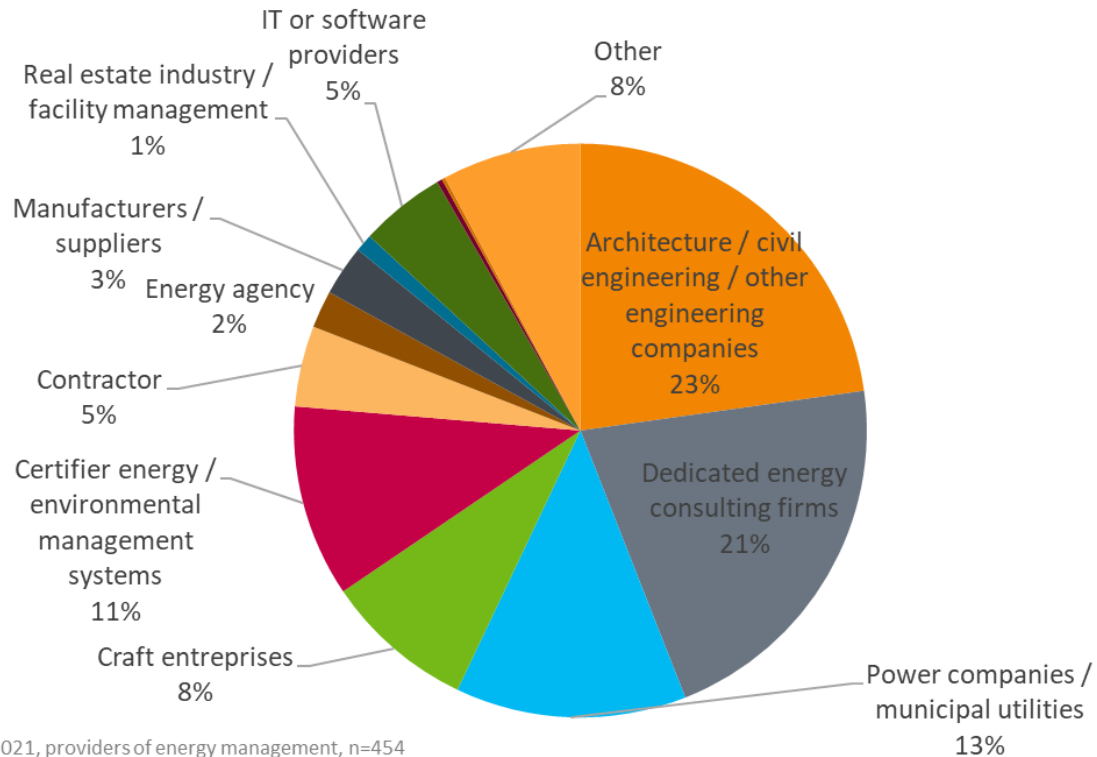
### Assessment of market development for services and products and certifications



EES survey 2021, providers of energy management

## The market for energy management

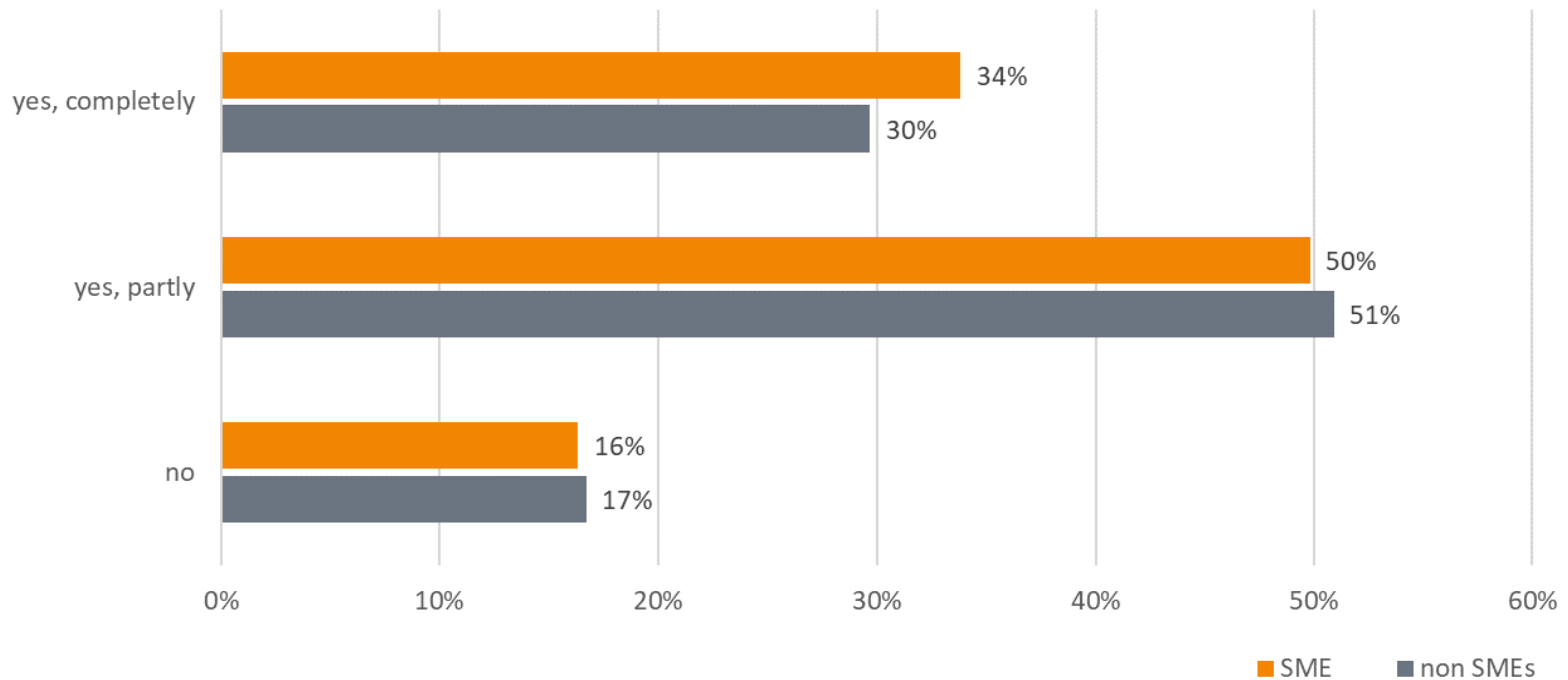
### Market structure of energy management providers



EES survey 2021, providers of energy management, n=454

## The market for energy management

### Implementation of proposed measures



EES survey 2021, companies, SME: n = 868, non SMEs: n = 321





## In short....

- the BfEE market study 2020 offers a systematic overview over the most important sectors from a suppliers and demand perspective
- the market for energy services is stable with robust growth perspectives (also abroad)
- there is no lack of suppliers in Germany
- reservations towards energy services on the demand side exist for the market to get more dynamic
- recent policy measures and development of energy prices may effect dynamic in the market

# Thank you for your attention!

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Results in English are available on  
<http://www.bfee-online.de/BfEE/DE/Energiedienstleistungen/Marktkennzahlen>