

Energy Efficiency Global Products and Services Markets

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Abstracts

The global energy efficiency (EE) market encompasses product and service markets that enable residential, commercial and industrial energy consumers to use less energy and save money. EE products include EE building goods, EE appliances, EE consumer electronics, smart meters, EE lighting, motor efficiency controllers, power management software and EE vehicles. EE services encompass smart grid, demand response, cloud computing and consulting and auditing services and also include energy service companies (ESCOs).

SBI Energy estimates in 2012, the total global energy efficiency market totaled a hefty \$595.45 billion. Although growth slipped a bit during the global recession of 2008-2009, business has picked back up and many market segments are now thriving. The future of the global EE market remains bright, as some segments enjoy especially prosperous growth. Smart meters are projected to experience a near 732.9% hike between 2012 and 2023, while EE appliances are expected to grow nearly 574% in the same time period.

A number of driving and inhibitory factors are affecting growth in this many-faceted market, some impacting the market as a whole and others only specific market segments. One of the most noteworthy factors influencing the total EE market is an increase in the number and stringency of regulations and other EE requirements around the world. This movement has helped to spur growth in many EE markets, as governments, manufacturers, businesses and others strive to reduce energy use in order to meet the new standards.

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Commercial EE Products & Services Adds Up to \$870 Billion

EE Consulting & Auditing Services Estimated at \$479 Billion

European Union

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PRODUCTS

- Building Efficiency Products
- Energy Efficient Appliances
- Energy Efficient Consumer Electronics
- Smart Meters
- Lighting
- Motor Efficiency Controllers
- Power Management Software
- Energy Efficient Vehicles

SERVICES

- Smart Grid
- Combined Heat and Power/Cogeneration
- Cloud Computing
- Energy Efficiency Consulting and Auditing
- Energy Service Companies

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RESIDENTIAL EE PRODUCTS AND SERVICES RESTS AT \$133.3 BILLION

COMMERCIAL EE PRODUCTS AND SERVICES REACHES \$170.51 BILLION

INDUSTRIAL EE PRODUCTS AND SERVICES EXCEEDS \$290 BILLION

GLOBAL MARKET FOR EE PRODUCTS CALCULATED AT \$399 BILLION IN 2012

GLOBAL MARKET FOR EE BUILDING PRODUCTS TOTALS \$97 BILLION IN 2012

GLOBAL MARKET FOR EE APPLIANCES RESTS AT \$74 BILLION

GLOBAL MARKET FOR EE CONSUMER ELECTRONICS LEVELS AT \$63 BILLION

GLOBAL MARKET FOR SMART METERS APPROACHES \$6.48 BILLION IN 2012

GLOBAL MARKET FOR EE LIGHTING RISES TO \$15.5 BILLION IN 2012

GLOBAL MARKET FOR MOTOR EFFICIENCY CONTROLLERS NEARS \$10 BILLION

GLOBAL MARKET FOR POWER MANAGEMENT SOFTWARE AT \$.72 BILLION

GLOBAL MARKET FOR EE VEHICLES ESTIMATED AT \$40 BILLION IN 2012

GLOBAL MARKET FOR EE SERVICES MEASURED AT \$205 BILLION IN 2012

GLOBAL MARKET FOR SMART GRID SERVICES EQUALS \$1.64 BILLION

GLOBAL MARKET FOR COGENERATION SERVICES ADDS UP TO \$2.5 BILLION

GLOBAL MARKET FOR CLOUD COMPUTING SERVICES TOTALS \$52 BILLION

MARKET FOR EE CONSULTING/AUDITING SERVICES PASSES \$80 BILLION

GLOBAL MARKET FOR ESCO SERVICES CALCULATED AT \$30 BILLION

MARKET PROJECTIONS

MARKET FOR EE PRODUCTS AND SERVICES REACHES \$3.3 TRILLION

RESIDENTIAL EE PRODUCTS AND SERVICES NEARS \$724 BILLION IN 2023

COMMERCIAL EE PRODUCTS & SERVICES ADDS UP TO \$870 BILLION

INDUSTRIAL EE PRODUCTS AND SERVICES NEARS \$1.3 TRILLION IN 2023

MARKET FOR EE PRODUCTS CALCULATED AT \$2.14 TRILLION IN 2023

MARKET FOR EE BUILDING PRODUCTS ADDS UP TO \$258 BILLION IN 2023

MARKET FOR EE APPLIANCES RESTS AT \$500 BILLION IN 2023

MARKET FOR EE CONSUMER ELECTRONICS LEVELS AT \$261 BILLION

GLOBAL MARKET FOR SMART METERS APPROACHES \$54 BILLION IN 2023

THE GLOBAL MARKET FOR EE LIGHTING RISES TO \$71 BILLION IN 2023

MARKET FOR MOTOR EFFICIENCY CONTROLLERS REACHES \$50.5 BILLION

MARKET FOR POWER MANAGEMENT SOFTWARE APPROACHES \$4 BILLION

GLOBAL MARKET FOR EE VEHICLES ESTIMATED AT \$450 BILLION IN 2023

GLOBAL MARKET FOR EE SERVICES MEASURED AT \$1.2 TRILLION IN 2023

GLOBAL MARKET FOR SMART GRID SERVICES EQUALS \$20 BILLION IN 2023

GLOBAL MARKET FOR COGENERATION SERVICES ADDS UP TO \$13 BILLION

MARKET FOR CLOUD COMPUTING SERVICES WORKS OUT TO \$309 BILLION

EE CONSULTING & AUDITING SERVICES ESTIMATED AT \$479 BILLION

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EUROPEAN UNION

CHINA

UNITED STATES

UNITED KINGDOM

INDIA

GERMANY

JAPAN

FRANCE

BRAZIL

ITALY
RUSSIA
CANADA
AUSTRALIA

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Economic Slump Inspires Demand for Energy Savings

Technological Advancements Spur Growth

Utility Companies Pulled into Energy Efficiency Market

Regulations Becoming More Stringent

Consumer Desire to Go Green Not Entirely Pure

Rising Energy Prices Inspire Energy Efficiency

Companies Involved in Energy Efficiency More Stable

Tax Credits and Rebates for EE Products and Services Encourage Sales

Energy Efficiency Leads to Energy Security

ASSOCIATIONS, ORGANIZATIONS, EXPOS & CONVENTIONS FUEL GROWTH

FACTORS IMPEDING GROWTH

Upfront Costs for EE Retrofits May be Daunting

Convincing the Public to Pay More for EE Products Not Always So Easy

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OVERVIEW: ENERGY EFFICIENCY PRODUCTS MARKETS

Building Efficiency Products

EE Appliances

Consumer Electronics

Smart Meters

EE Lighting

Motor Efficiency Controllers

Power Management Software

EE Vehicles

OVERVIEW: ENERGY EFFICIENCY SERVICE MARKETS

- Smart Grid
- Combined Heat and Power/Cogeneration
- Cloud Computing
- EE Consulting/Auditing
- ESCOs

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 - The Super-Efficient Equipment and Appliance Deployment
 - Renewable Energy and Energy Efficiency Partnership
 - ACEEE International Energy Efficiency Scorecard
 - Minimum Energy Performance Standards

ENERGY EFFICIENCY SCHEMES CROSS BORDERS

COUNTRIES JOIN FORCES

- National Energy Efficiency Action Plans

COUNTRIES MOST INVOLVED IN THE ENERGY EFFICIENCY MARKET

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EE CONSUMER ELECTRONICS

SMART METERS

EE LIGHTING

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COGENERATION/CHP

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