

SolarPower Webinar:

The European Energy Storage Market - through the eyes of the Installers



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The European Energy Storage Market - through the eyes of the Installers



MODERATOR
Raffaele Rossi

Policy Analyst



SPEAKER
Giorgia Concas

General Secretary

**The European Association for
Electrical Contractors (AIE)**



SPEAKER
Julian Lückerrath

EuPD Research



SPEAKER
Saif Islam

EuPD Research



Agenda

- A. About EuPD Research
- B. EU Market size and forecast
- C. The study “Global PV InstallerMonitor 2017/2018”
- D. Summary

About EuPD Research

EuPD Research: The B2B Specialist for International Market Research



Exclusive Services

- Customer Satisfaction
- Market Analyses
- Storage Workshops



PV-Reports

- EndCustomer Monitor
- Global PV Installer Monitor
- Business and Industry Monitor



Certifications

- Customer Satisfaction Seal
- Top PV Supplier
- Top Brand PV



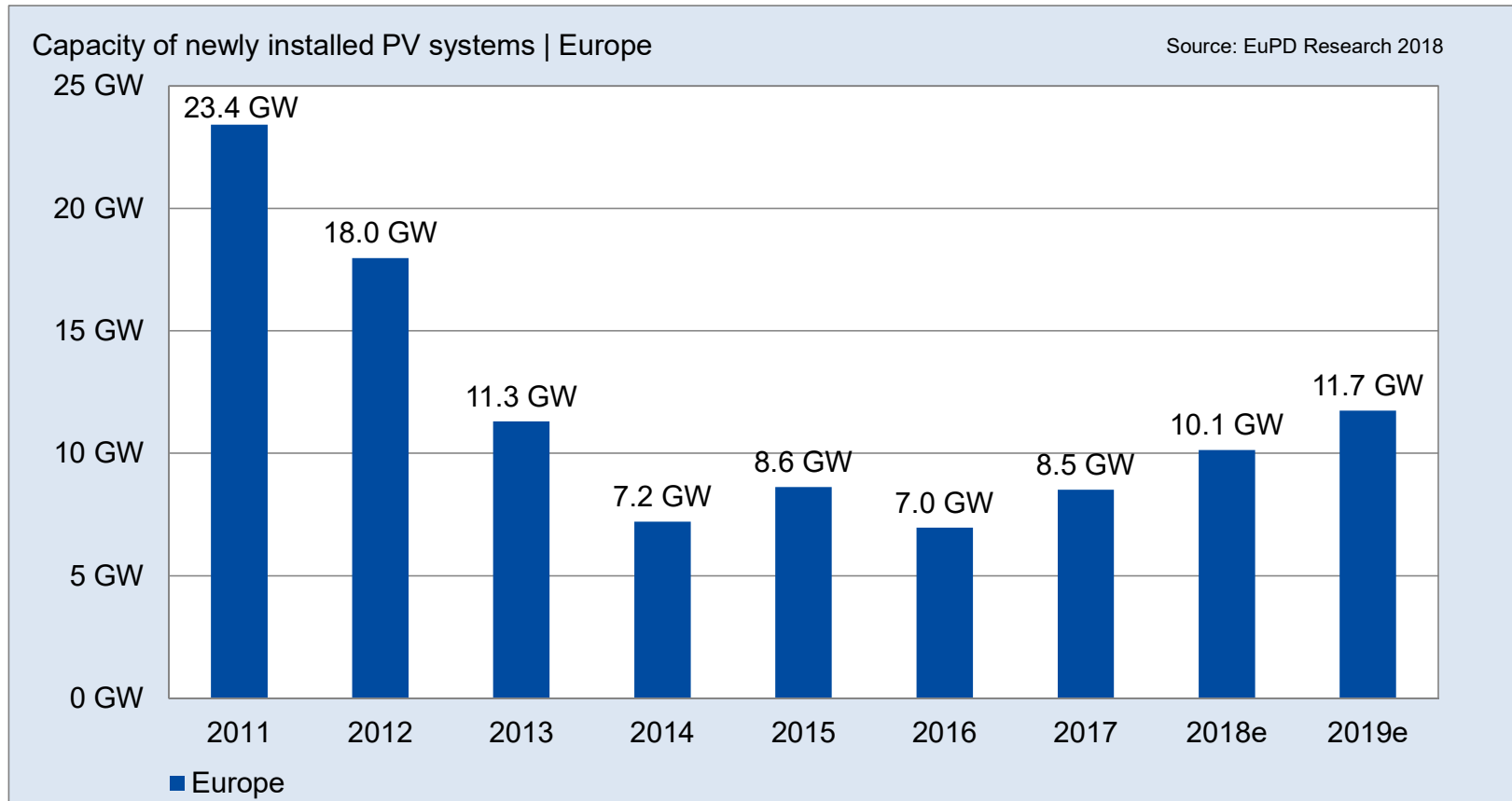
EuPD Research: References (Extract)



Market size and forecast

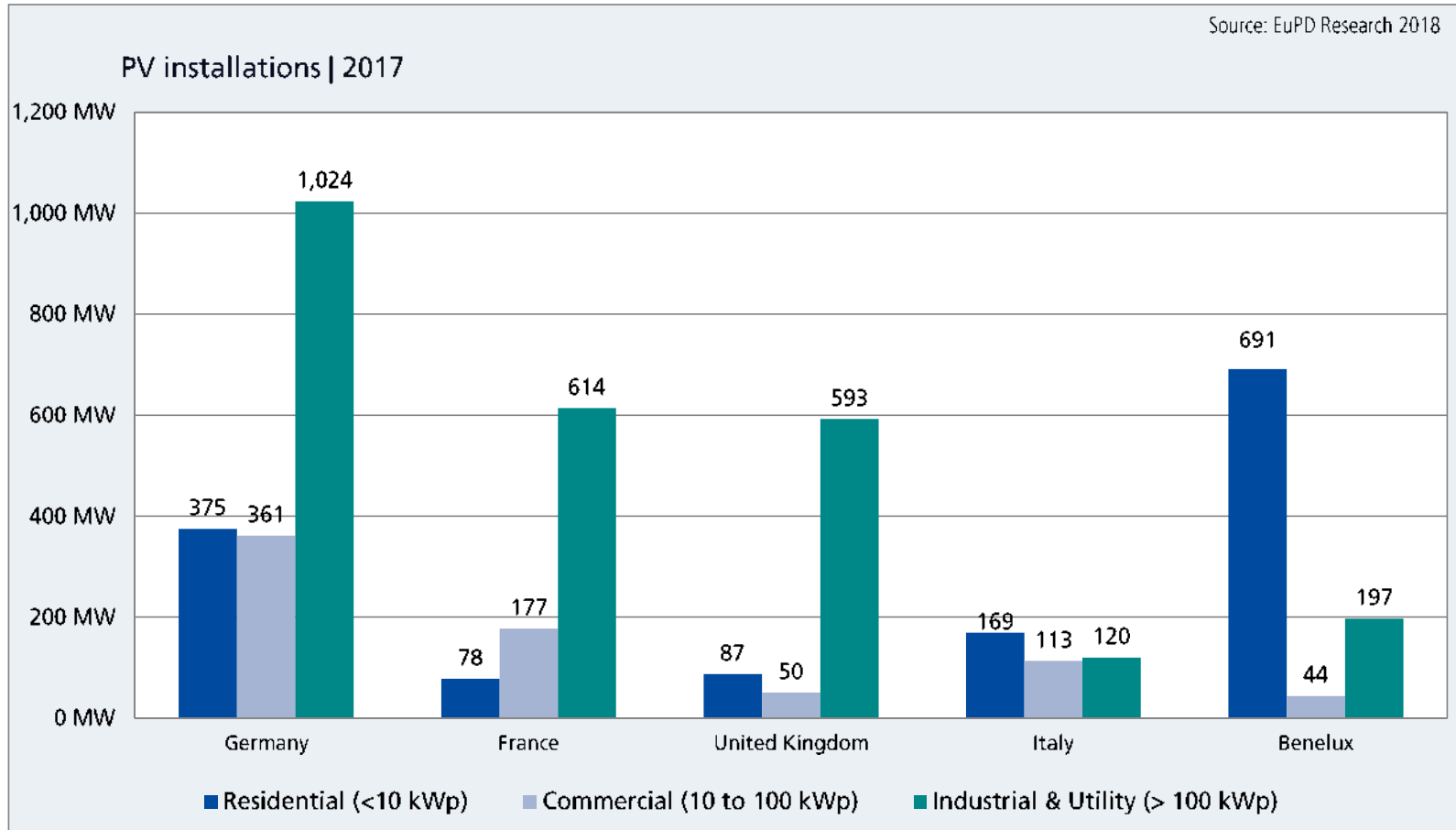
Photovoltaic market overview – Absolute numbers

After a long downturn in installation number the European market is facing a new growth path for the next years.



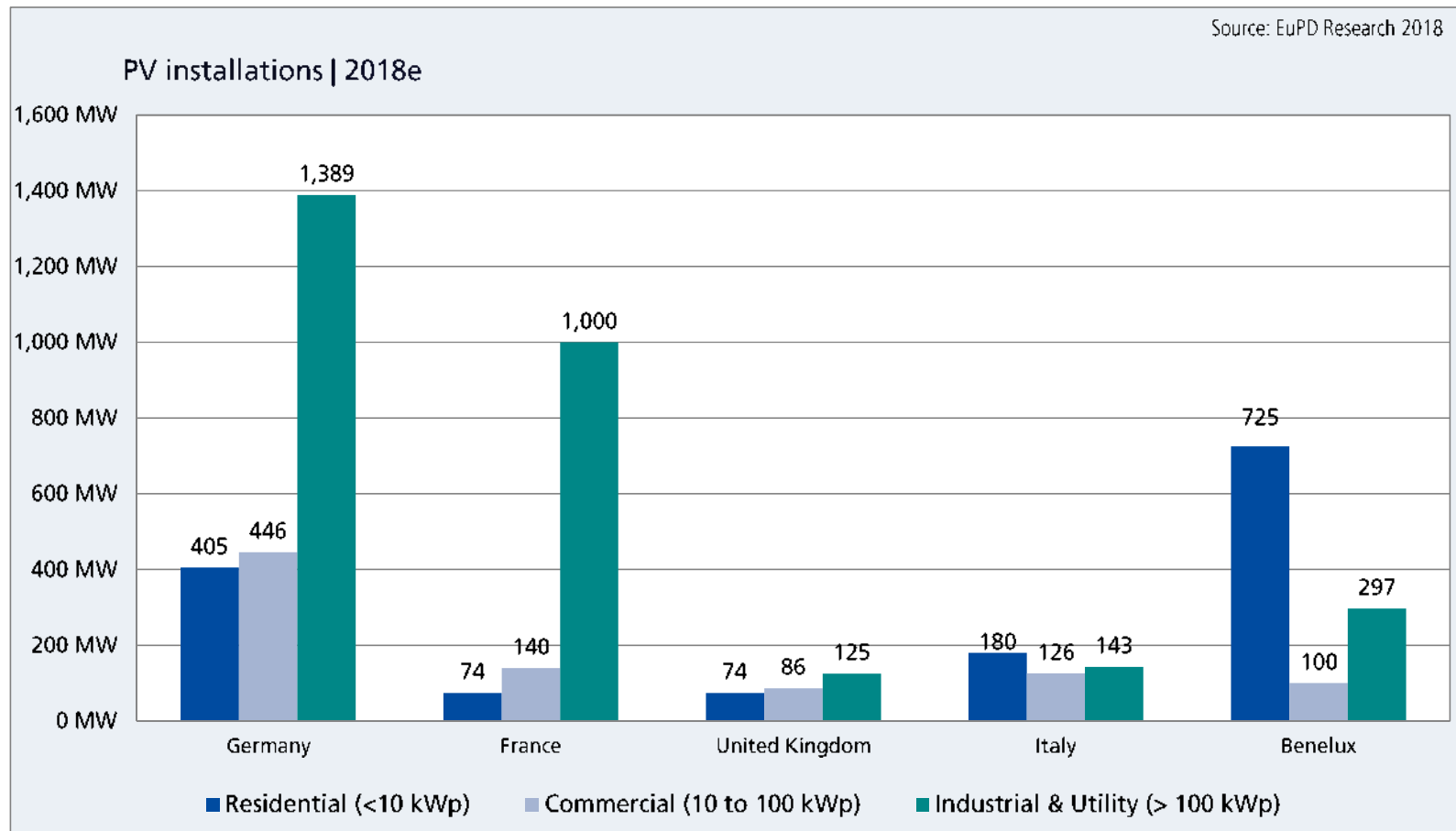
Photovoltaic market overview – Absolute numbers

Depicted the PV installations in 2017 for the most important European markets.



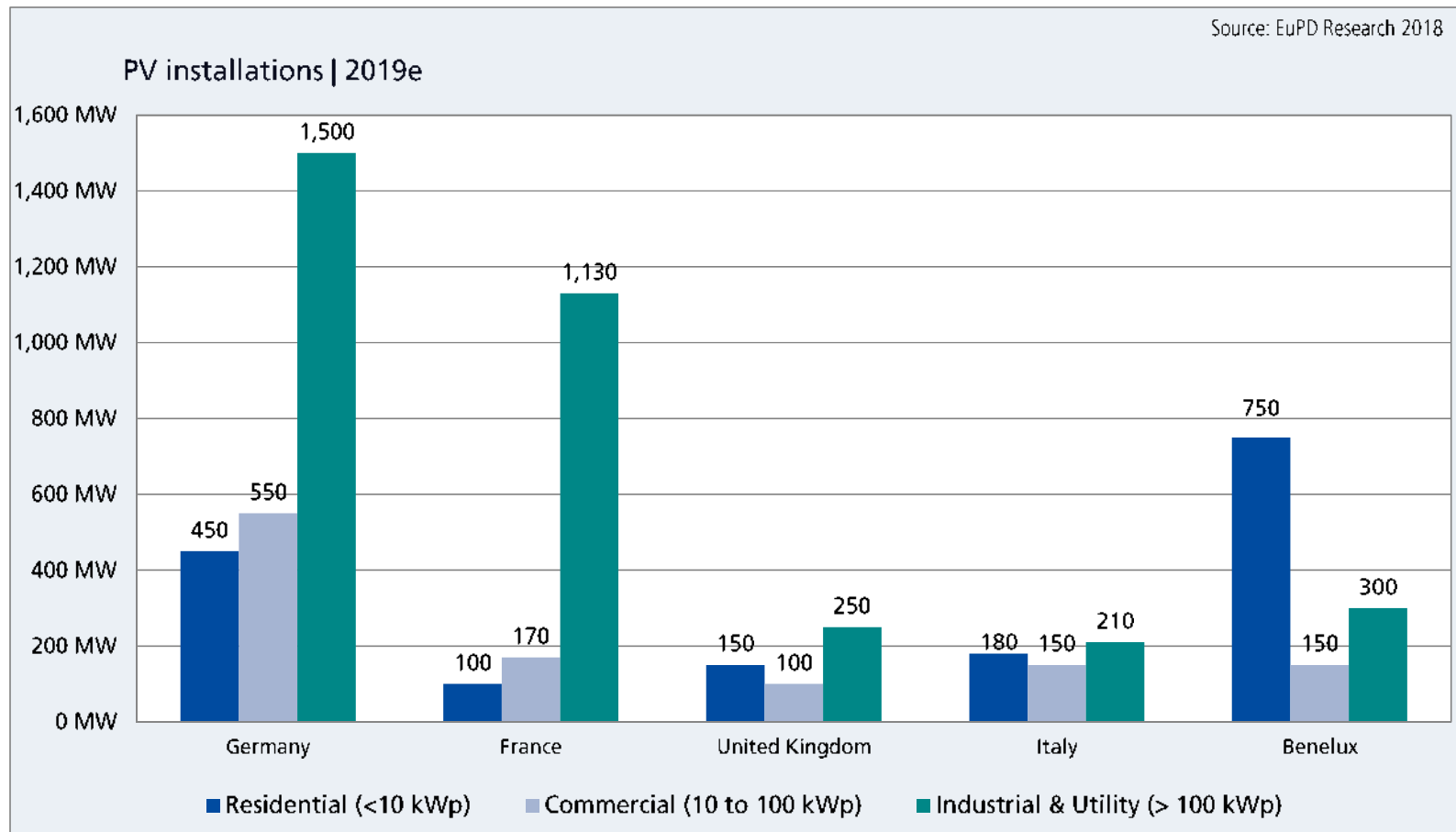
Photovoltaic market overview – Absolute numbers

Depicted the expected PV installations in 2018 for the most important European markets.



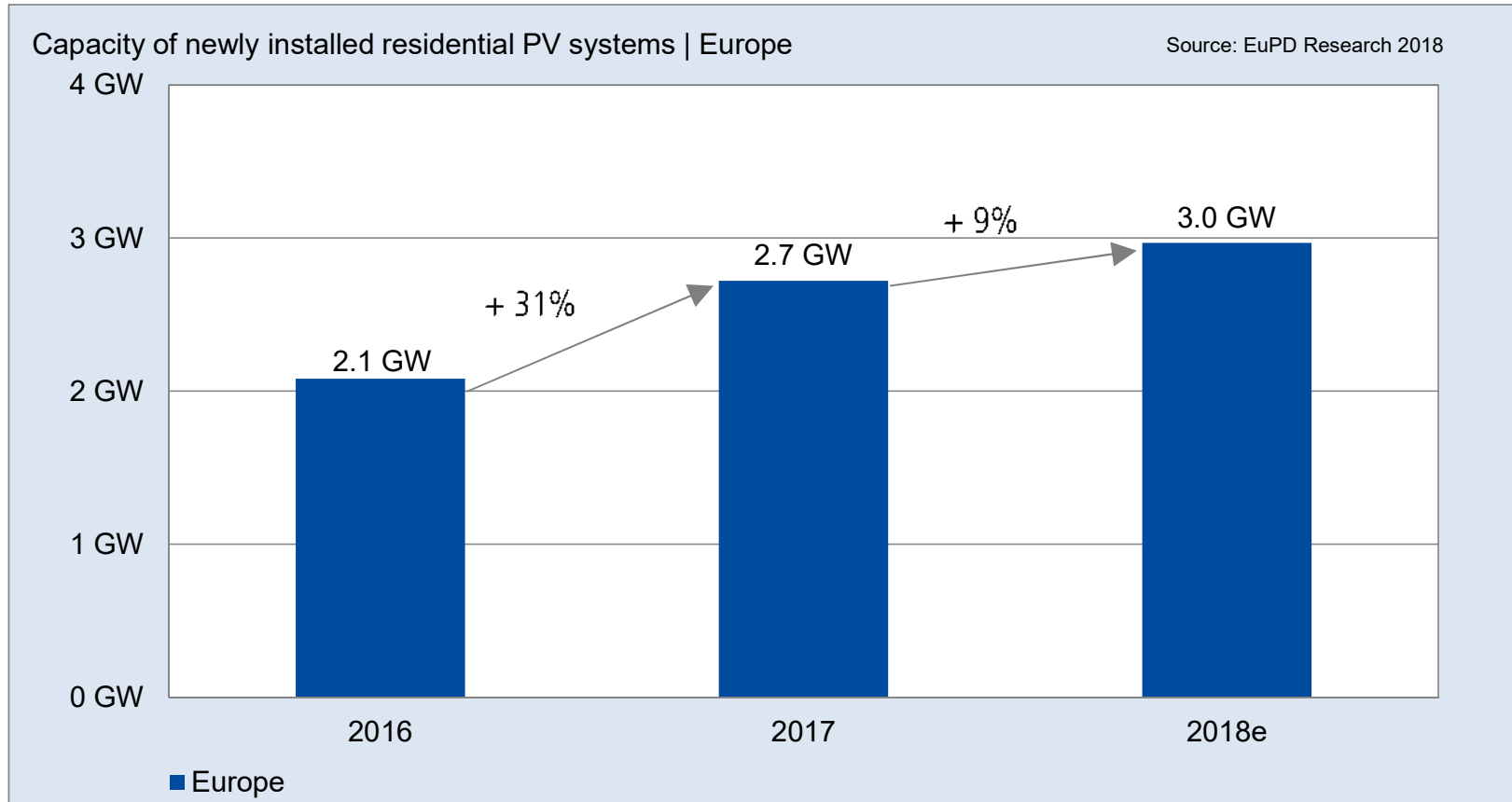
Photovoltaic market overview – Absolute numbers

Depicted the expected PV installations in 2019 for the most important European markets.



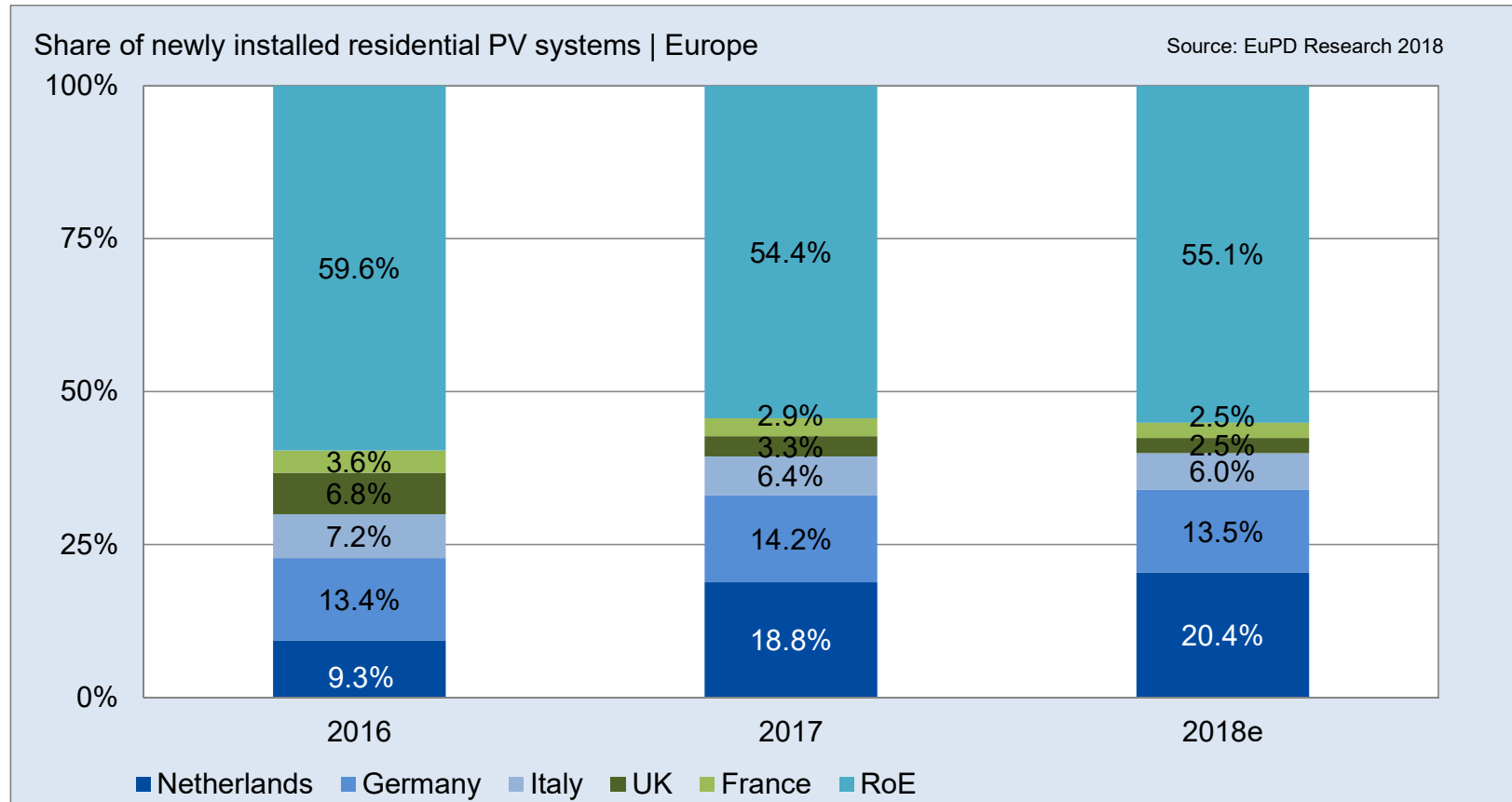
Photovoltaic market overview – Absolute numbers

In accordance to the total PV market development the European residential market increases from 2016 to 2017. For the current year 2018 an ongoing growth is expected.



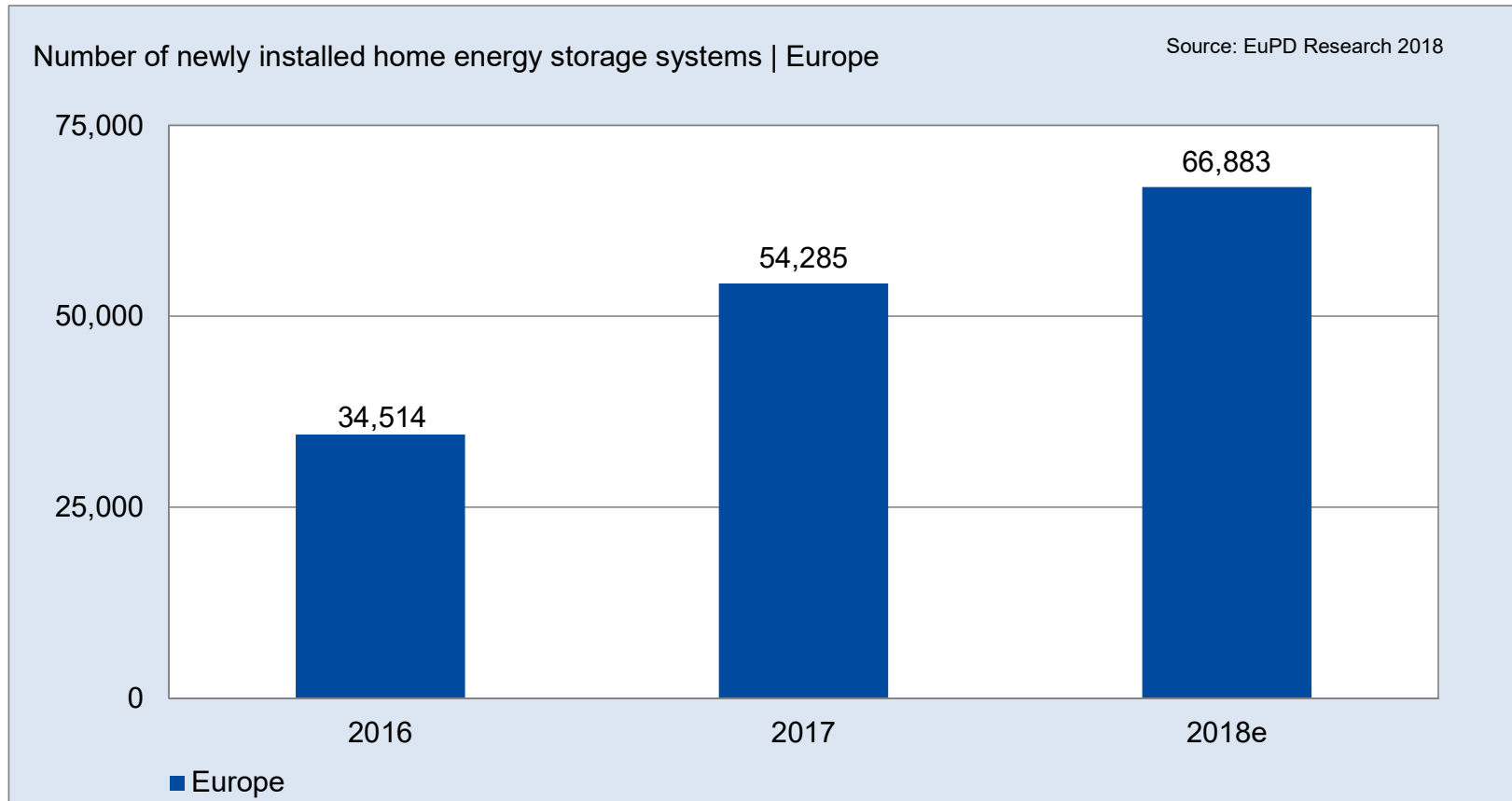
Photovoltaic market overview – Absolute numbers

The residential PV installations in the Netherlands showed a strong increase and will reach around one fifth of the European market. The share of France decreased slightly from 2016 to 2018.



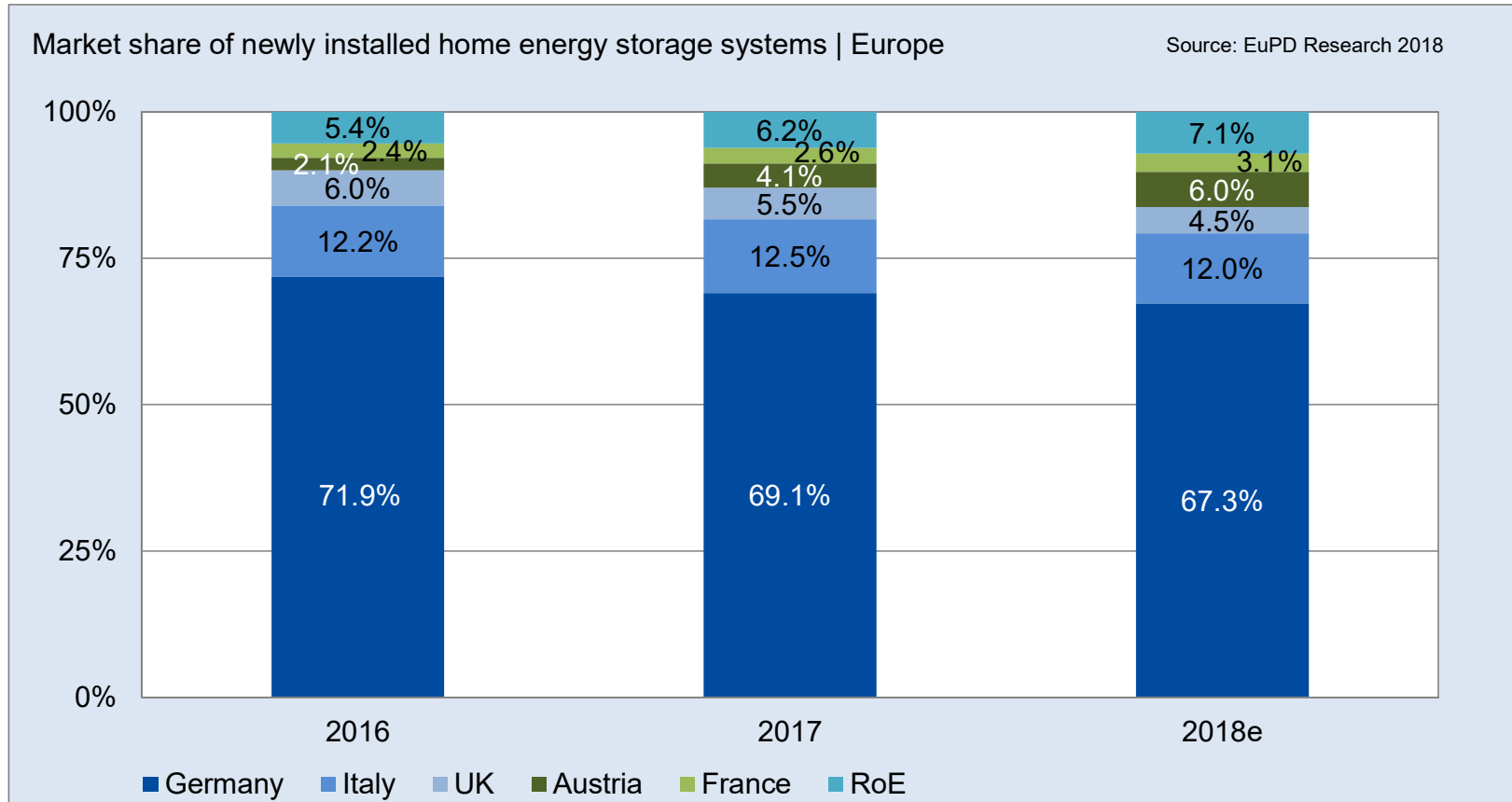
Market overview home energy storage – Absolute numbers

Between 2016 and 2018 the European market of home energy storage systems will nearly double.



Market overview home energy storage –Absolute numbers

Despite the strong market growth in European home energy storage market, Germany is still dominating this market in 2018 clearly. France reached a share of around three percent in the European market.



The study "Global PV InstallerMonitor 2017/2018"

The study "Global PV InstallerMonitor 2017/2018"

Global PV InstallerMonitor 2017/2018



- n = 200 surveyed installers

- Modules, inverters and storage solutions
 - Procurement Management
 - Brand Management
 - Market Penetration
 - Satisfaction Analysis
- Field phase: November 2018 - February 2018

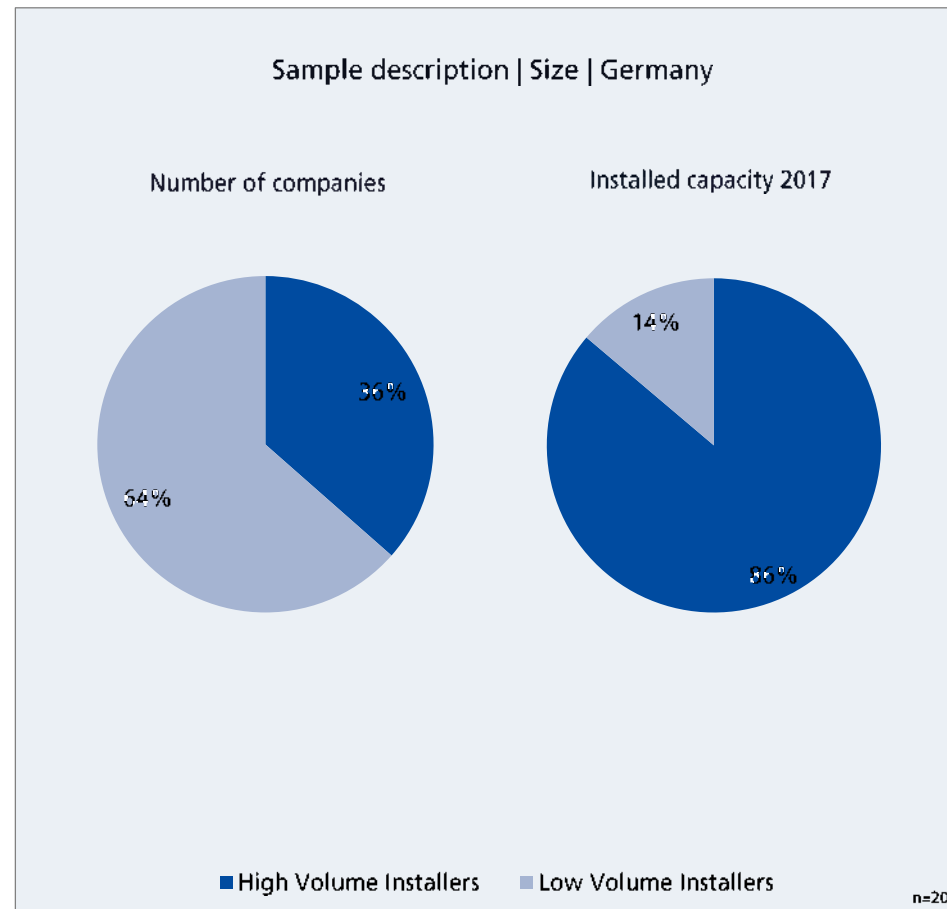


- Other EU countries n = 100

Sample description

Sample description

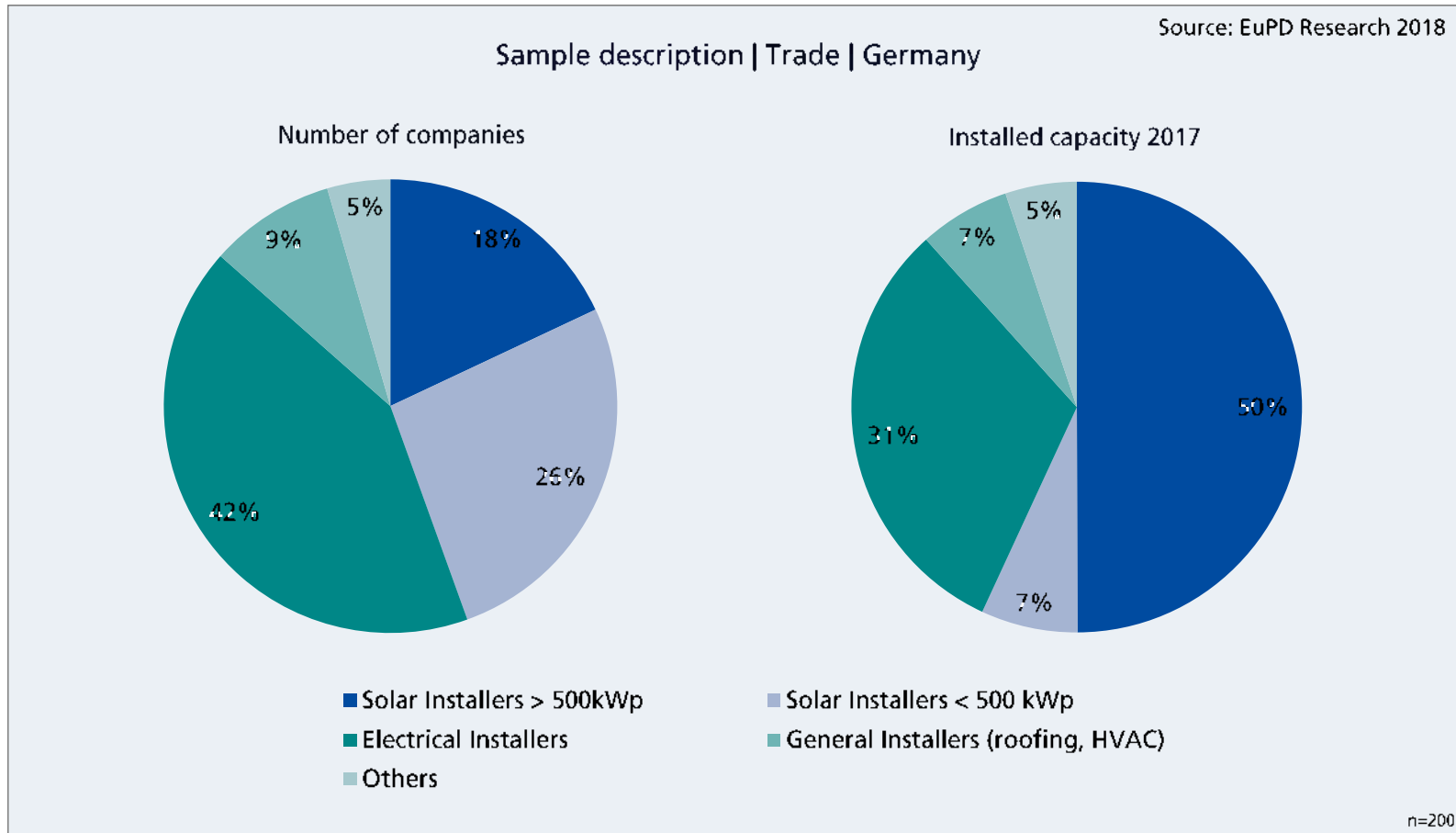
- 36 percent of the questioned installers account for 86 percent of the installed capacity.



Source: EuPD Research 2018

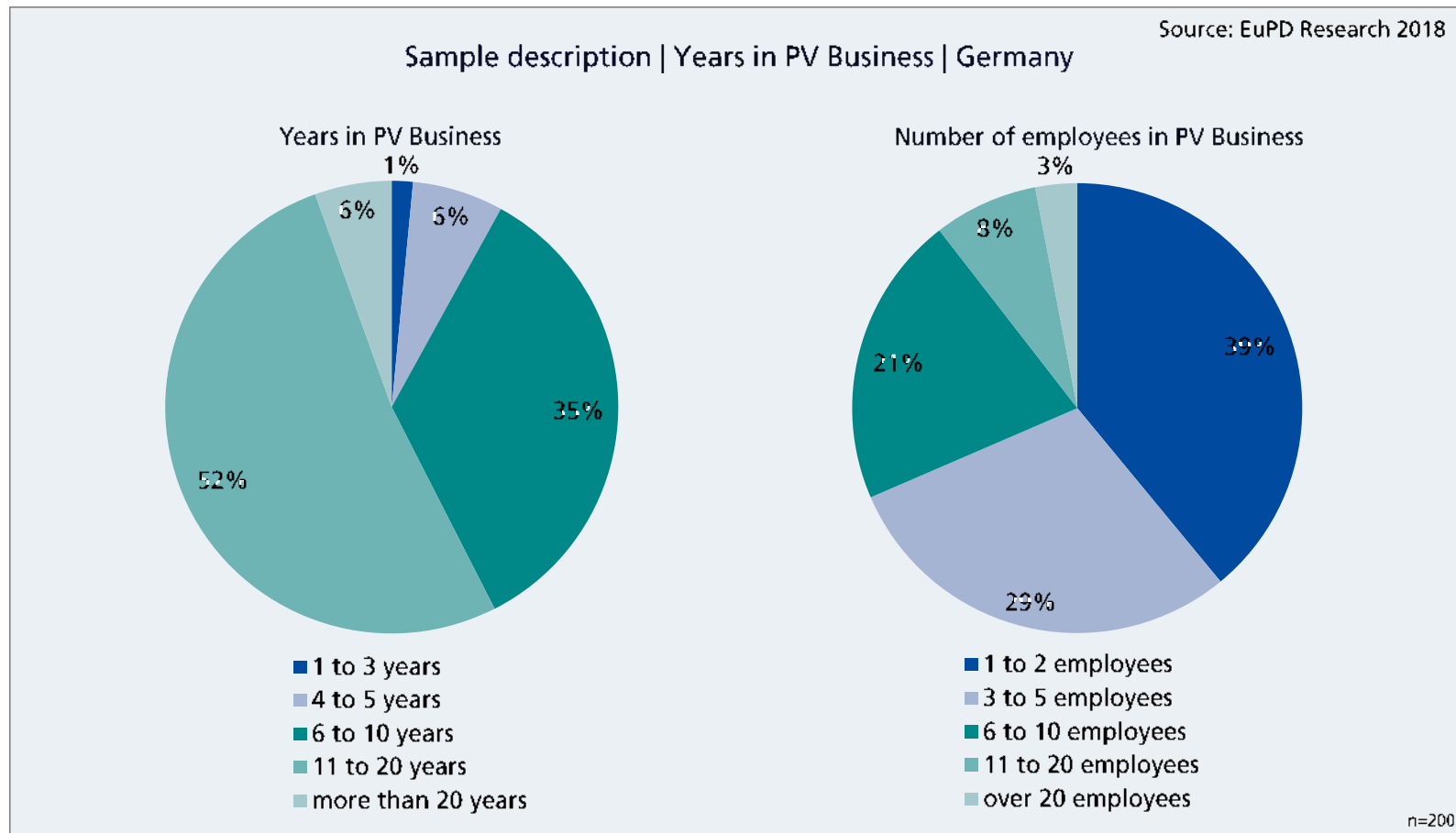
Sample description

- About 42 percent of the surveyed companies consist of electrical installers. Half of the installed capacity in 2017 has been installed through solar installers, who installed over 500 kWp in 2017.



Sample description

- Only seven percent of the companies are reasonably new to the solar business.
- The majority has less than 6 employees working in the field of PV.



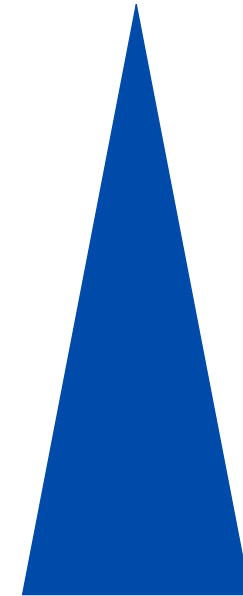
Sample description

European comparison – years in PV and number of employees

Source: EuPD Research 2018

Country	Years in PV	Number of employees
NL	4 – 10	1 – 2
FR	6 – 10	1 – 2
UK	6 – 10	1 – 5
ACH	6 – 10	1 – 5
IT	6 – 20	3 – 5
GER	11 – 20	3 – 10

Little experience/
fewer employees

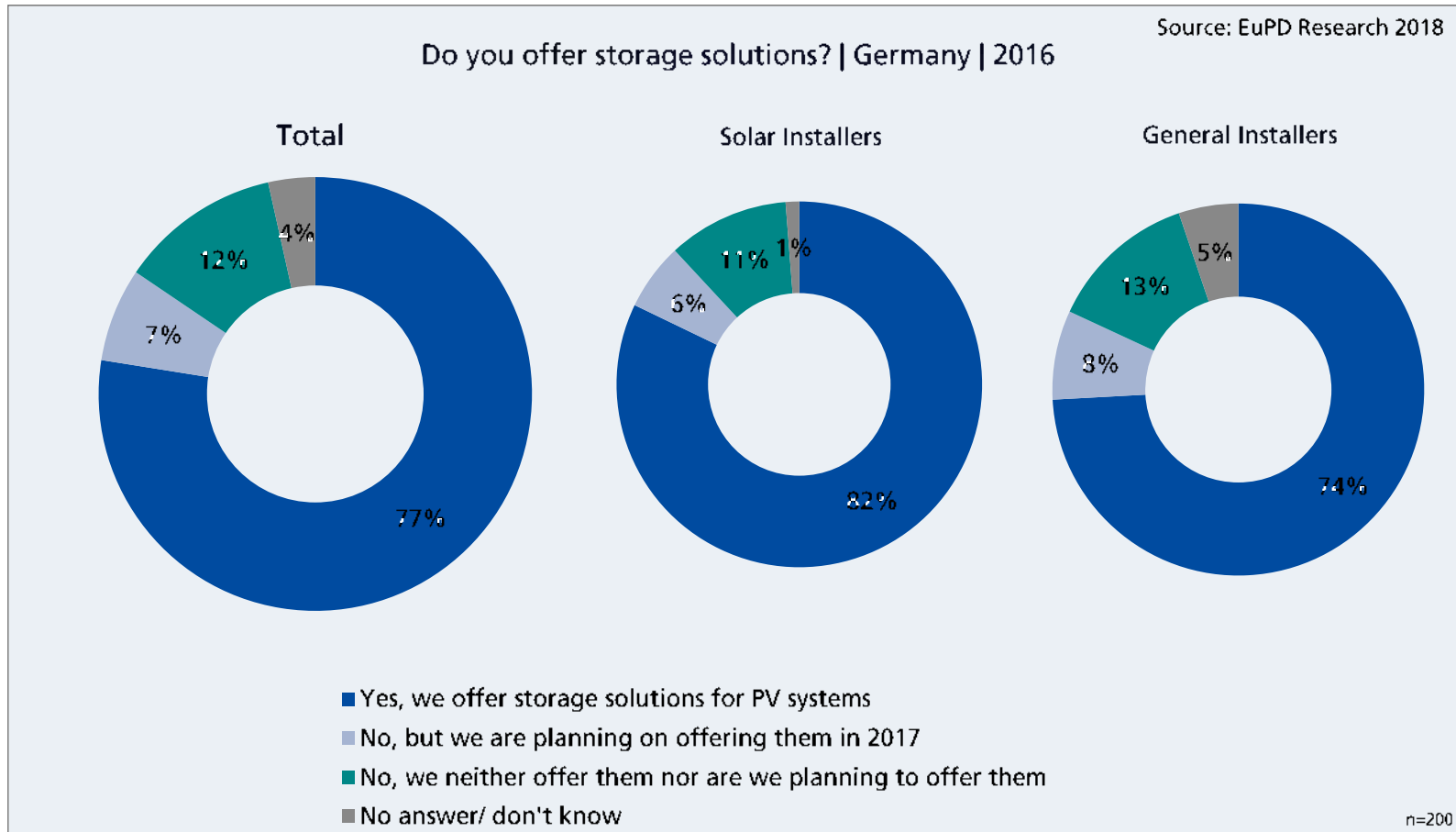


Experienced/
bigger companies

Overview Installers' portfolios

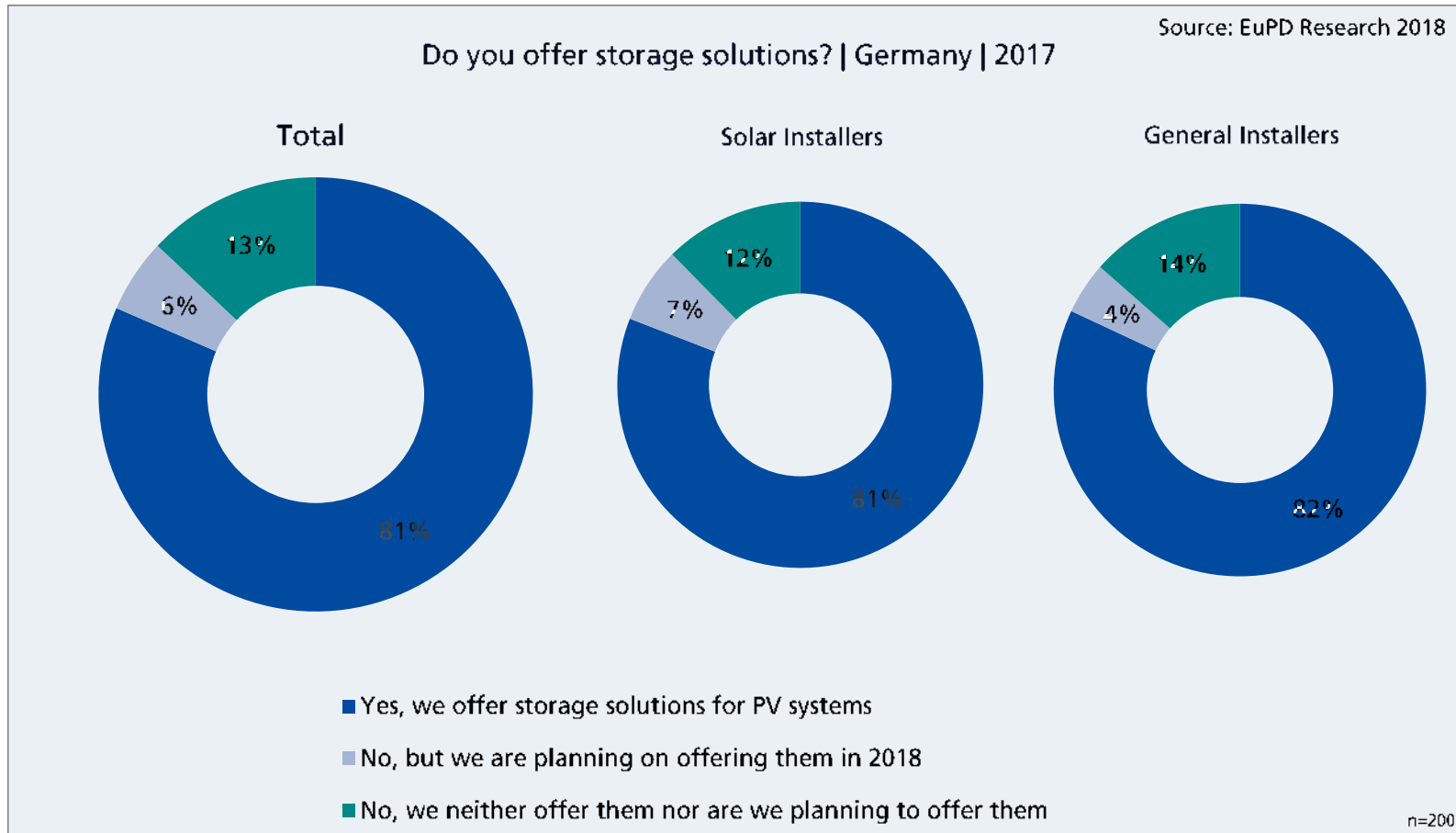
Installers' portfolios 2016

- In 2016, more than three quarters of the surveyed installers offered storage solutions.



Installers' portfolios 2017

- Compared to 2016, the number of suppliers of storage solutions increased. Especially general installers offer storage solutions more often.



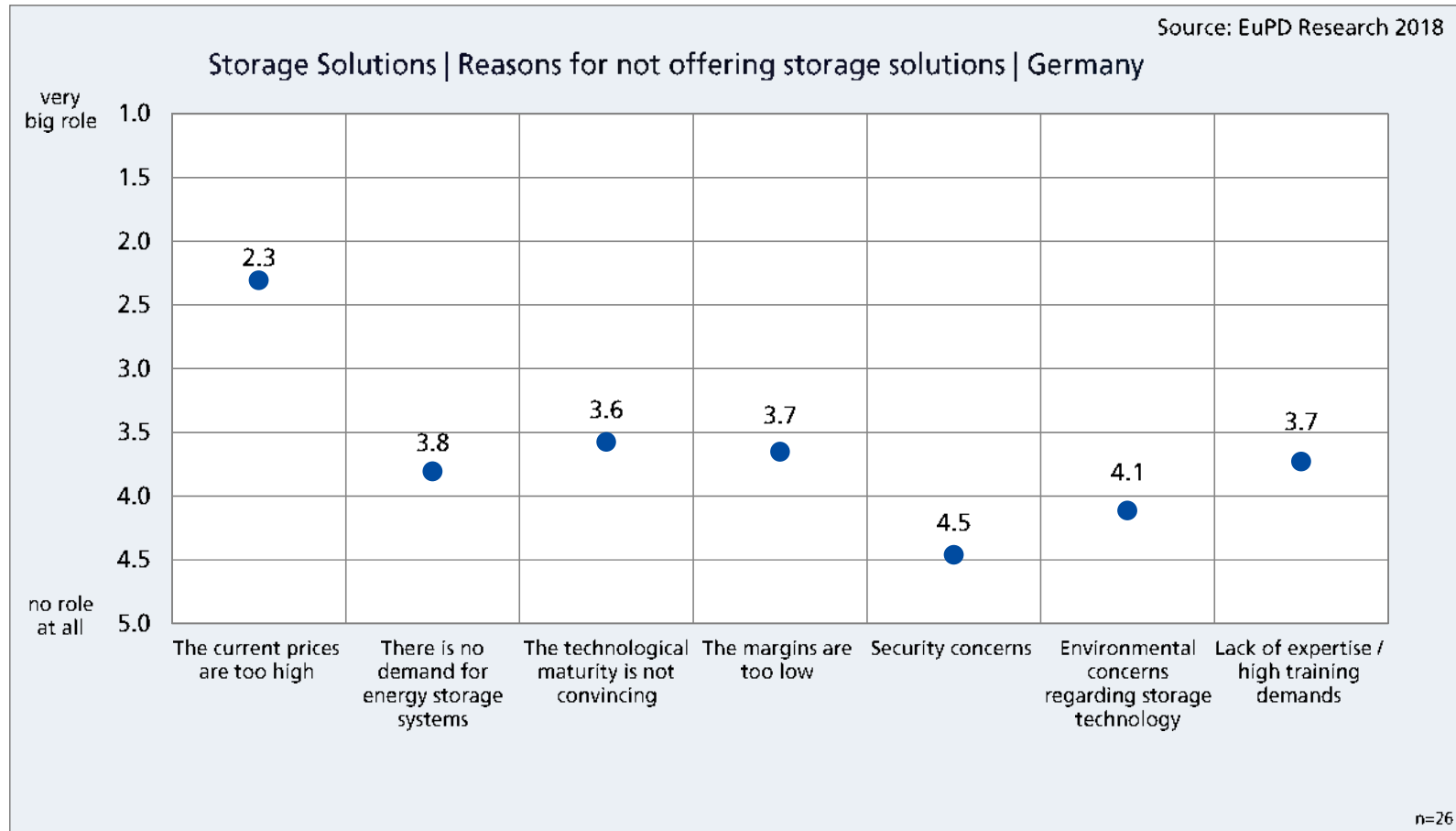
Installers' portfolios

- European comparison – Number of installers who offer storage solutions Source: EuPD Research 2018

Country	2016 [%]	2017 [%]	Growth rate
NL	6	20	+ 233 %
UK	18	22	+ 22 %
FR	33	32	- 3 %
IT	21	48	+ 129 %
GER	77	81	+ 5 %
ACH	-	86	-

Reasons for not offering storage solutions

- The price plays the biggest role when deciding against offering storage solutions.



Reasons for not offering storage solutions

- European comparison – Most important reasons for not offering storage solutions

Source: EuPD Research 2018

Country	Reason
NL	No demand for energy storage systems
UK	No demand for energy storage systems, margins too low
FR	The current prices are too high
IT	The current prices are too high
GER	The current prices are too high
ACH	Environmental concerns, lack of expertise

Procurement of storage systems