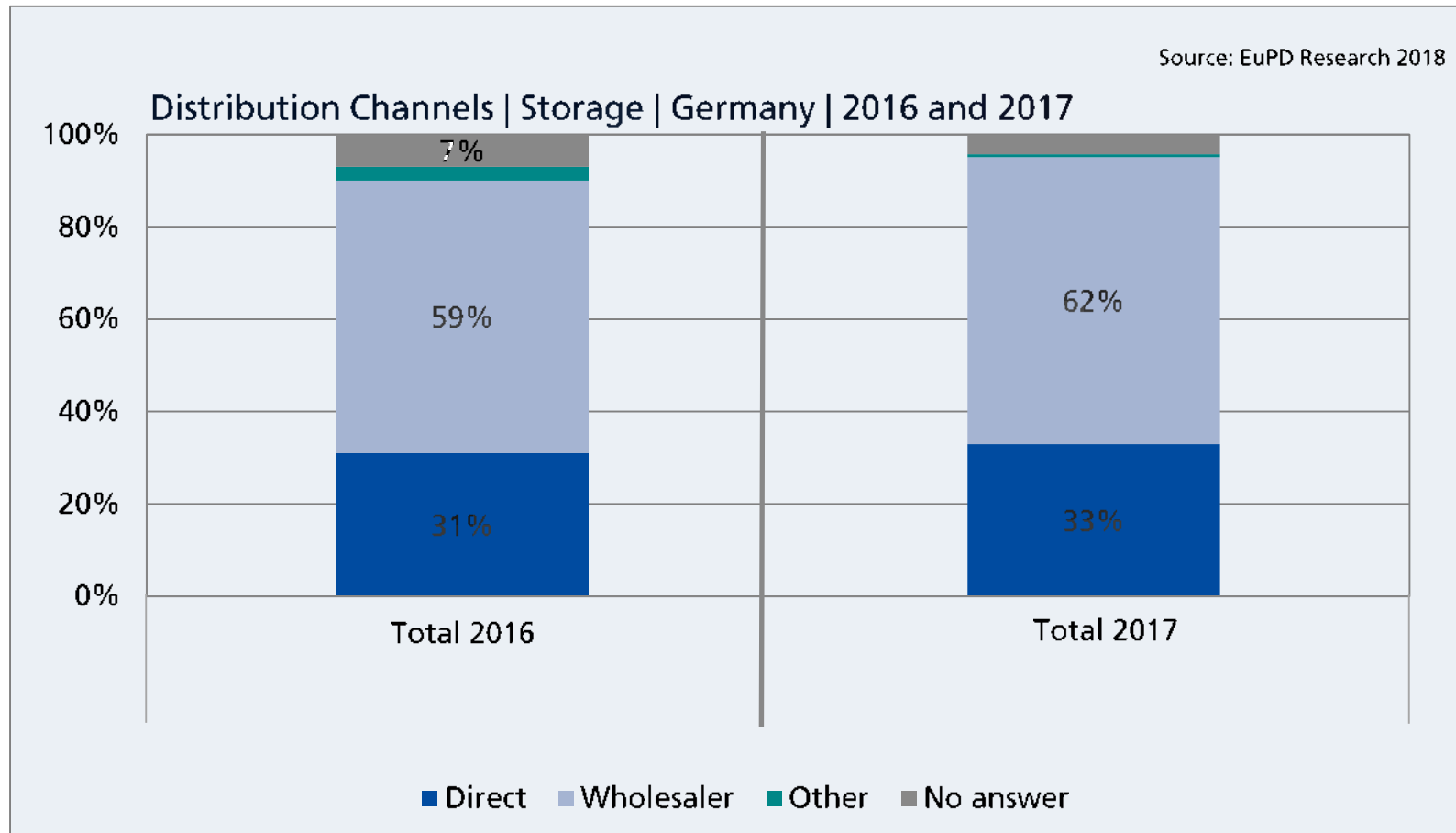


## Sourcing of storage systems

- In 2016 and in 2017, storage systems were mainly bought via wholesaler.



## Sourcing of storage systems

---

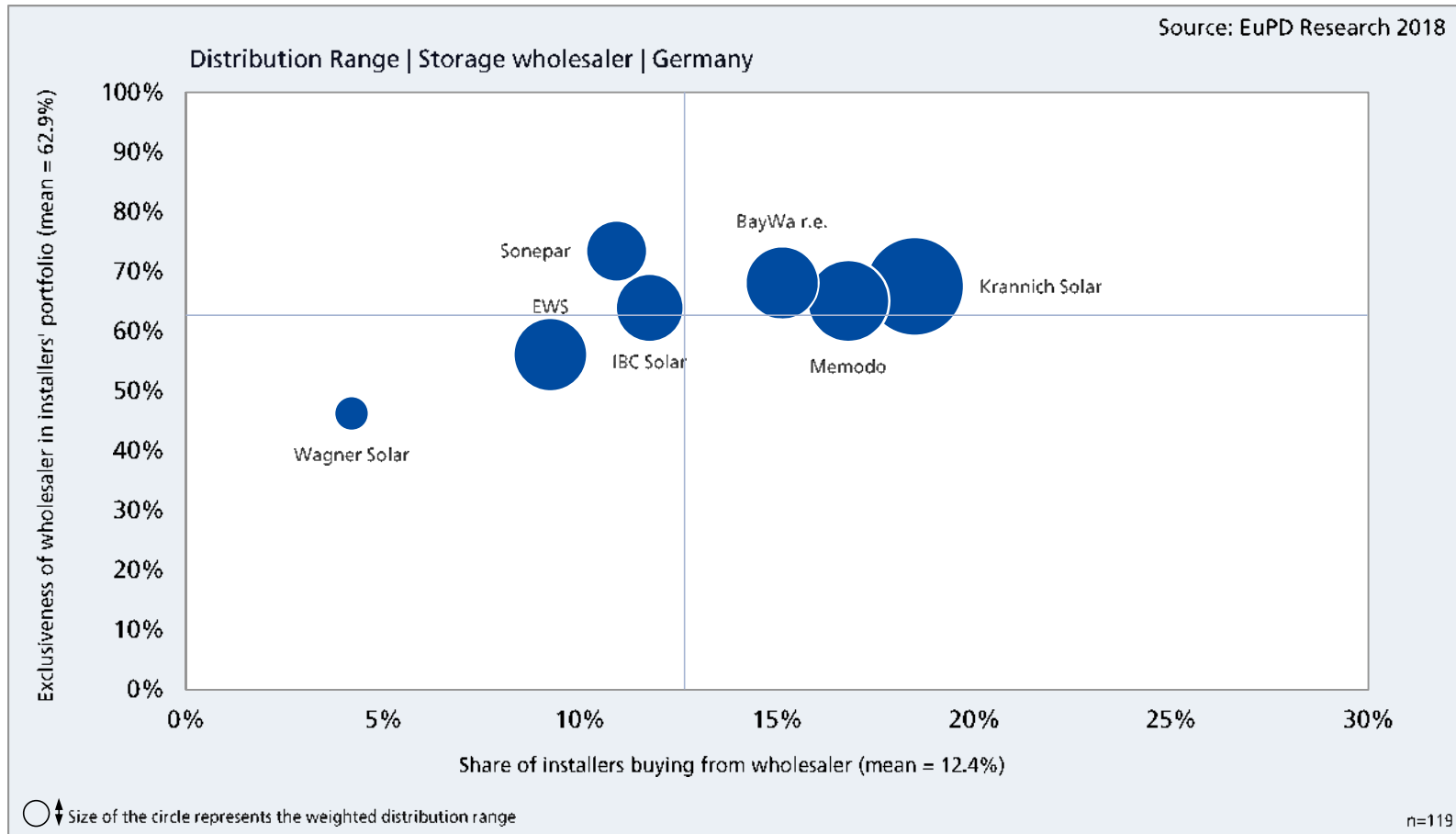
### European comparison – Share of indirect procurement

Source: EuPD Research 2018

Country	Share of wholesale 2016 [%]	Share of wholesale 2017 [%]	Growth rate
GER	59	62	+ 5 %
IT	41	63	+ 54 %
FR	21	47	+ 124 %
ACH	-	66	-

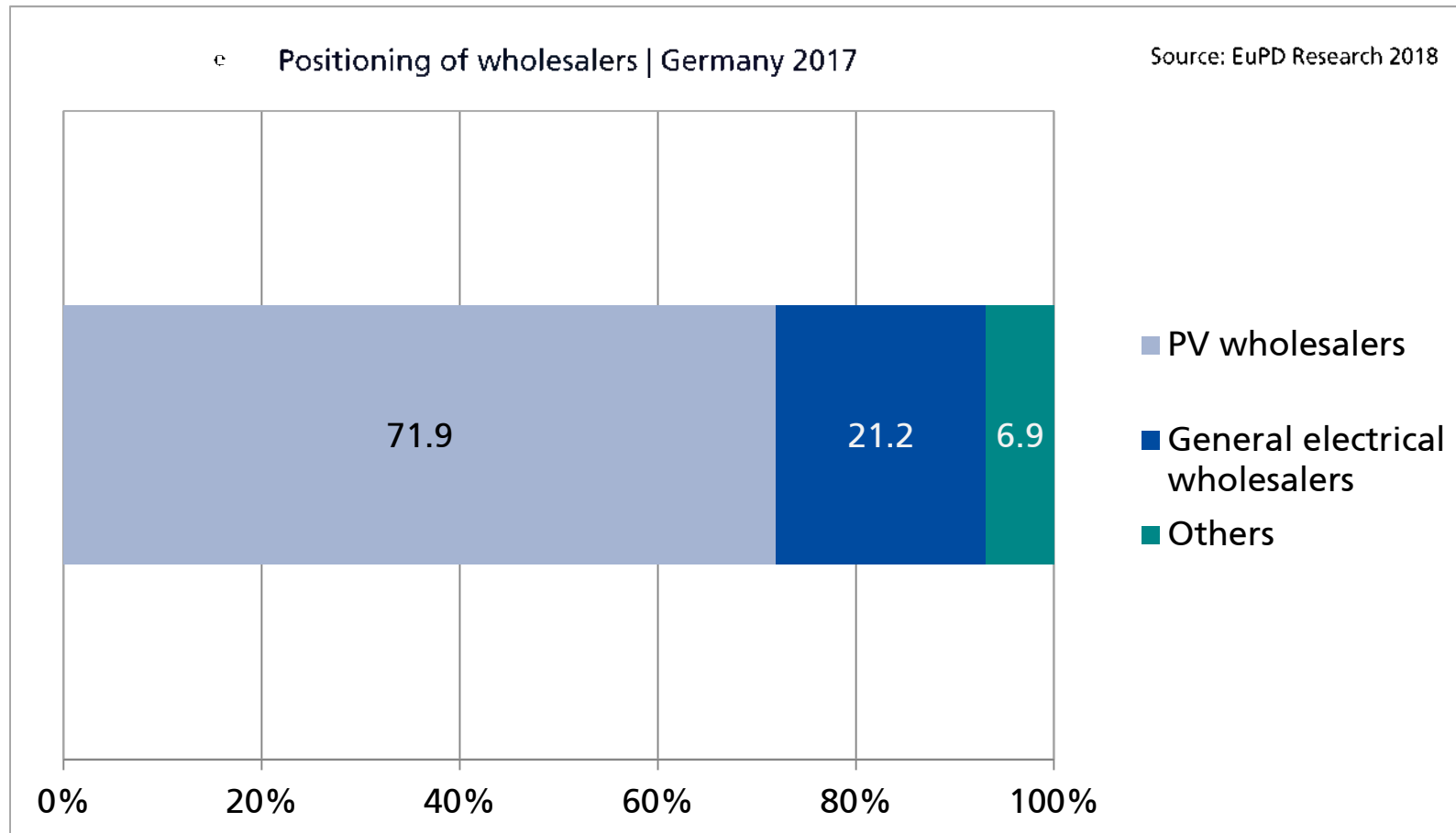
## Positioning of wholesalers

- ⓘ Krannich Solar, Memodo and BayWa r.e. are closely together regarding distribution range.



## Positioning of wholesalers

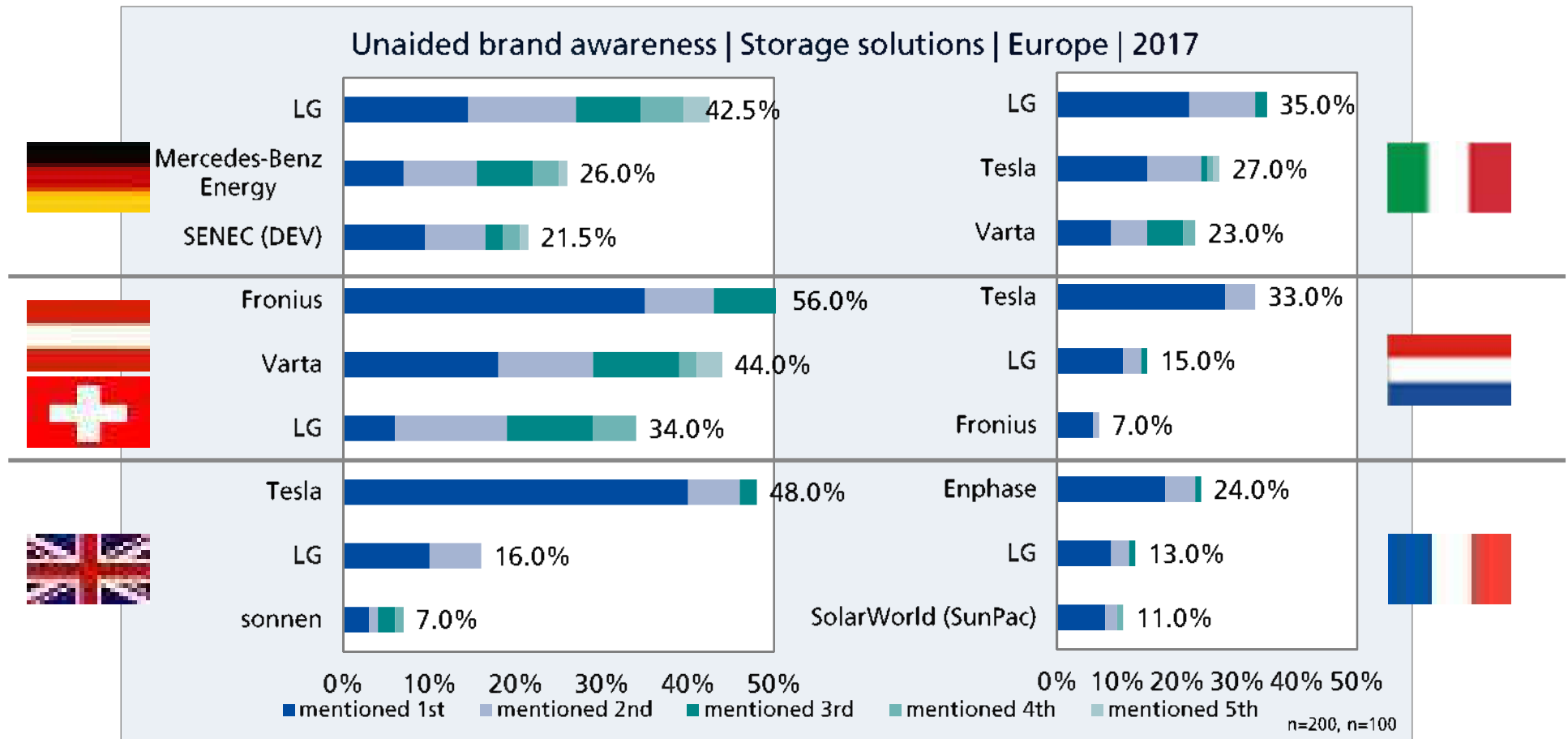
- Share of specific PV wholesalers (such as Memodo and Krannich), general electrical wholesalers and others such as utilities



Brand Awareness

# Unaided brand awareness – Germany 2017

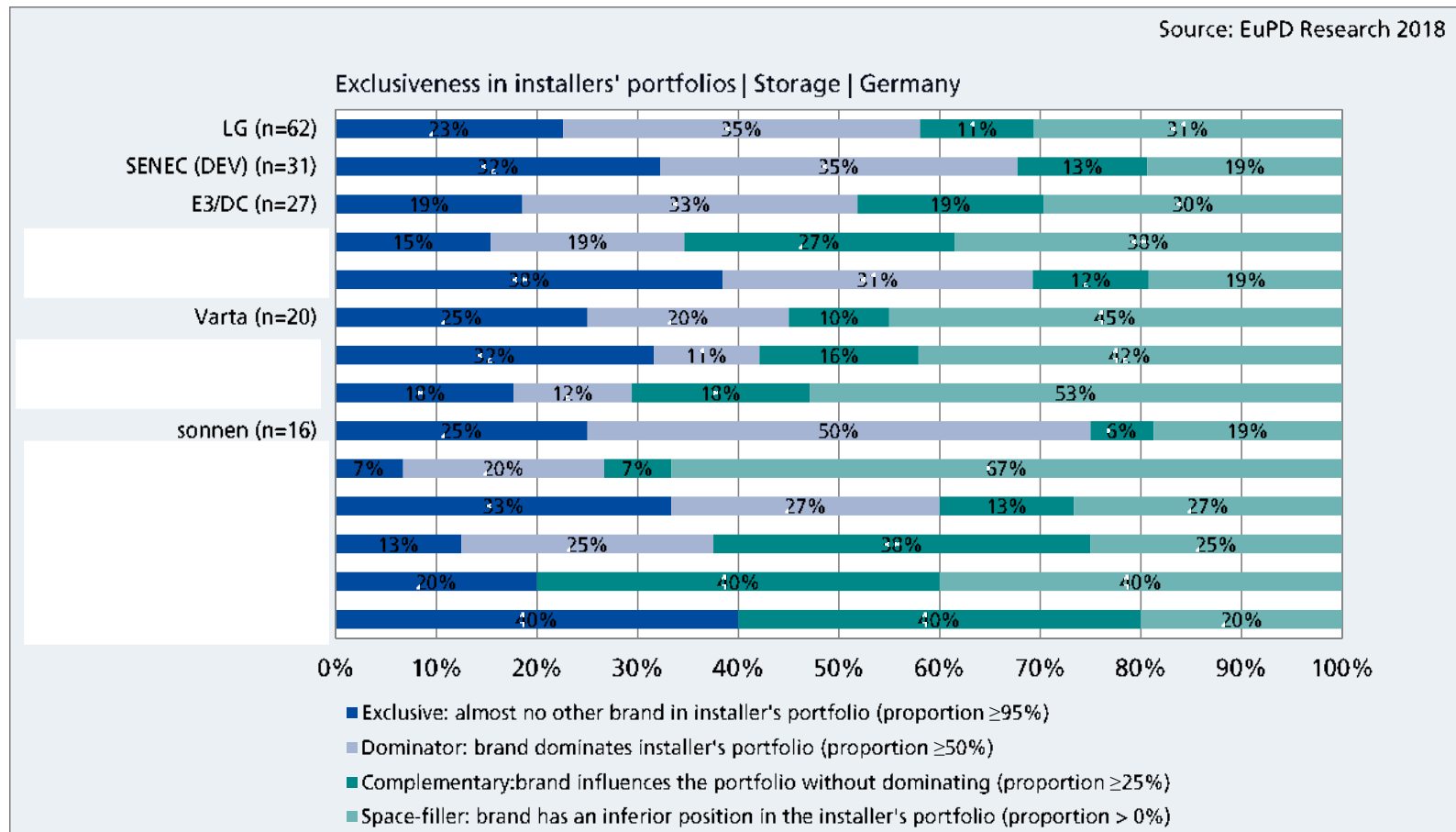
## European Comparison – Unaided brand awareness.



Market Penetration

## Distribution depth of energy storage suppliers

- Among the most frequently named brands, Fronius has the highest exclusiveness values.

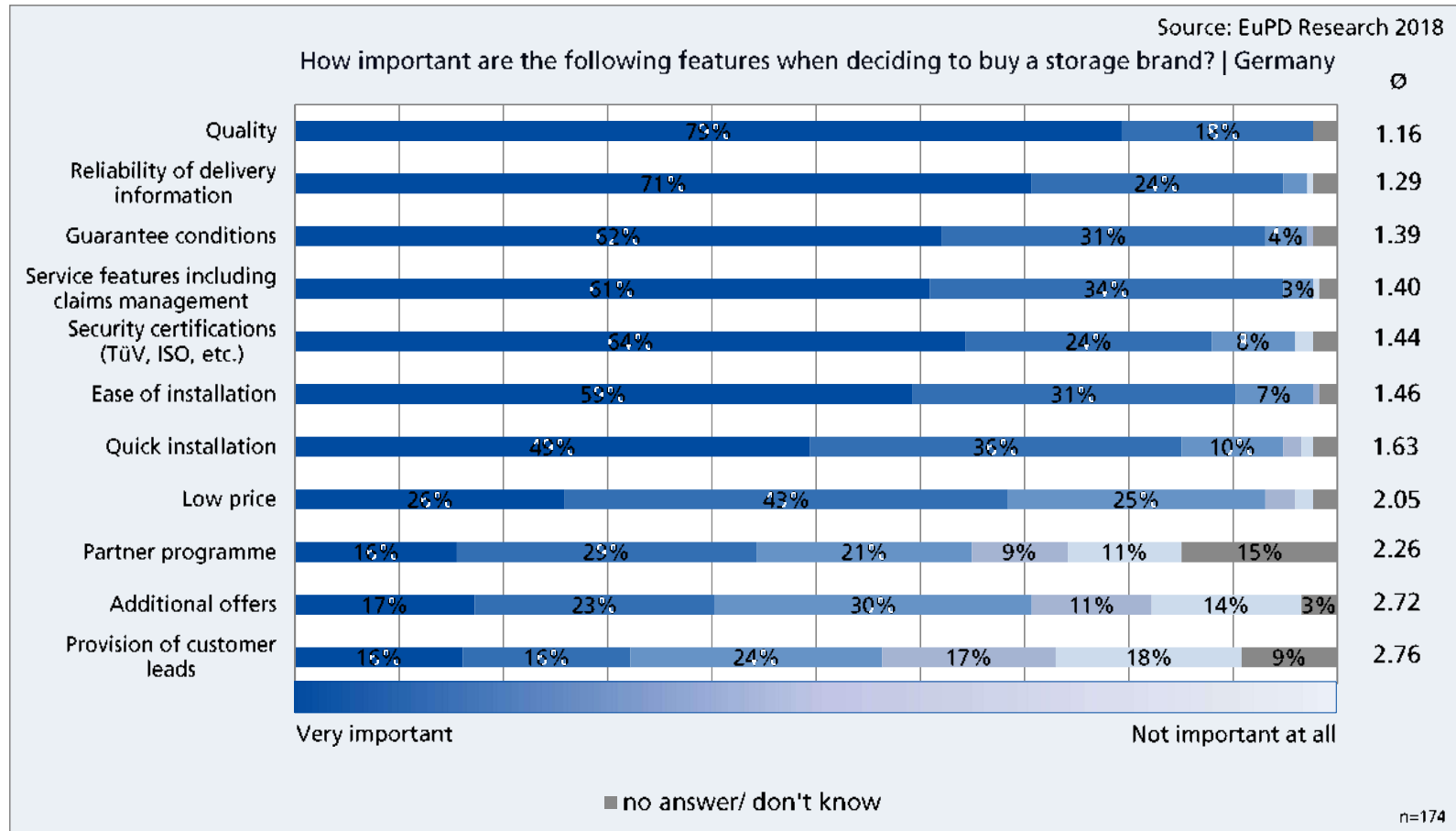




# Satisfaction Analysis

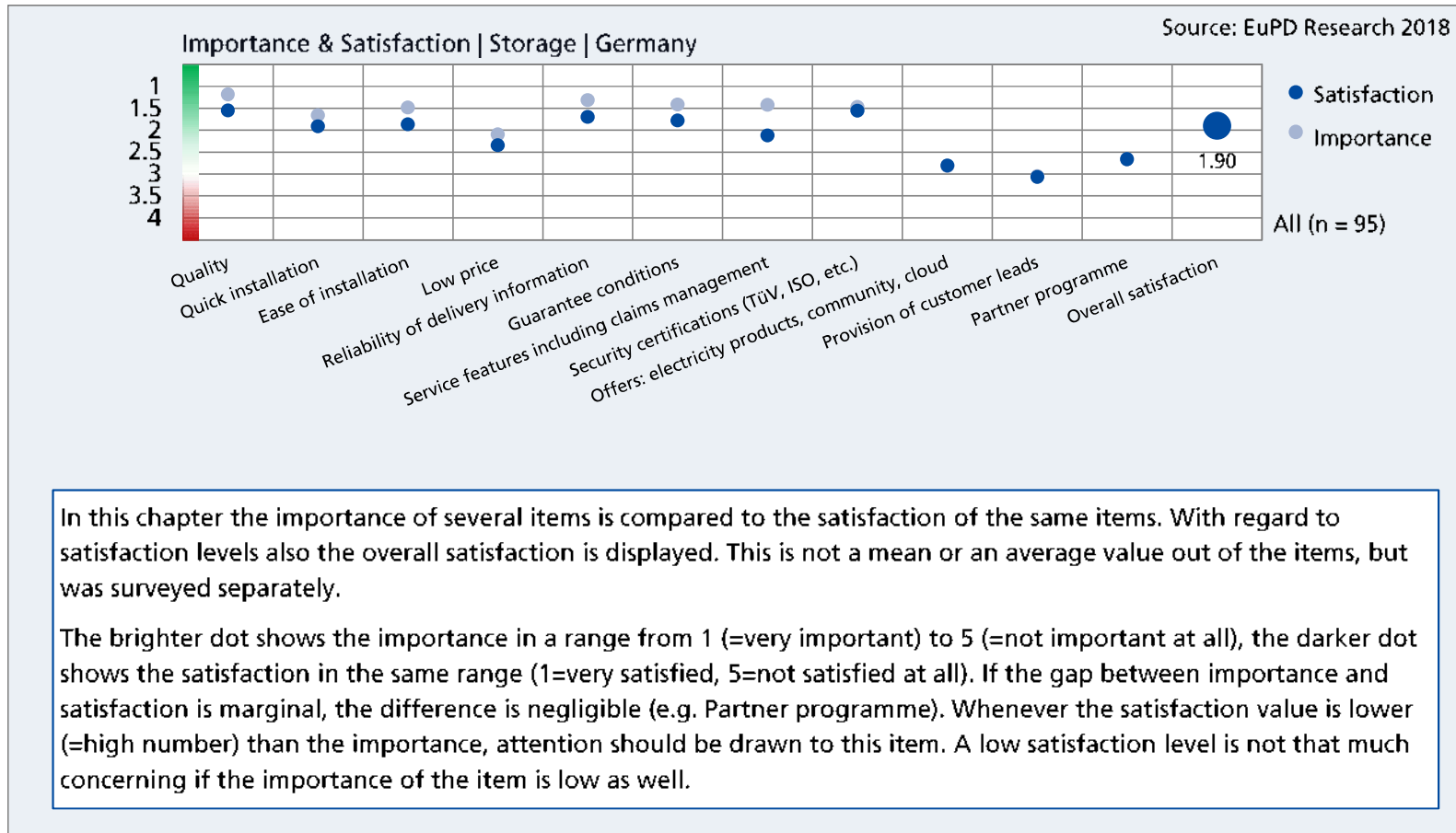
## Importance of aspects

- Quality is the most important feature in the decision for a storage brand.



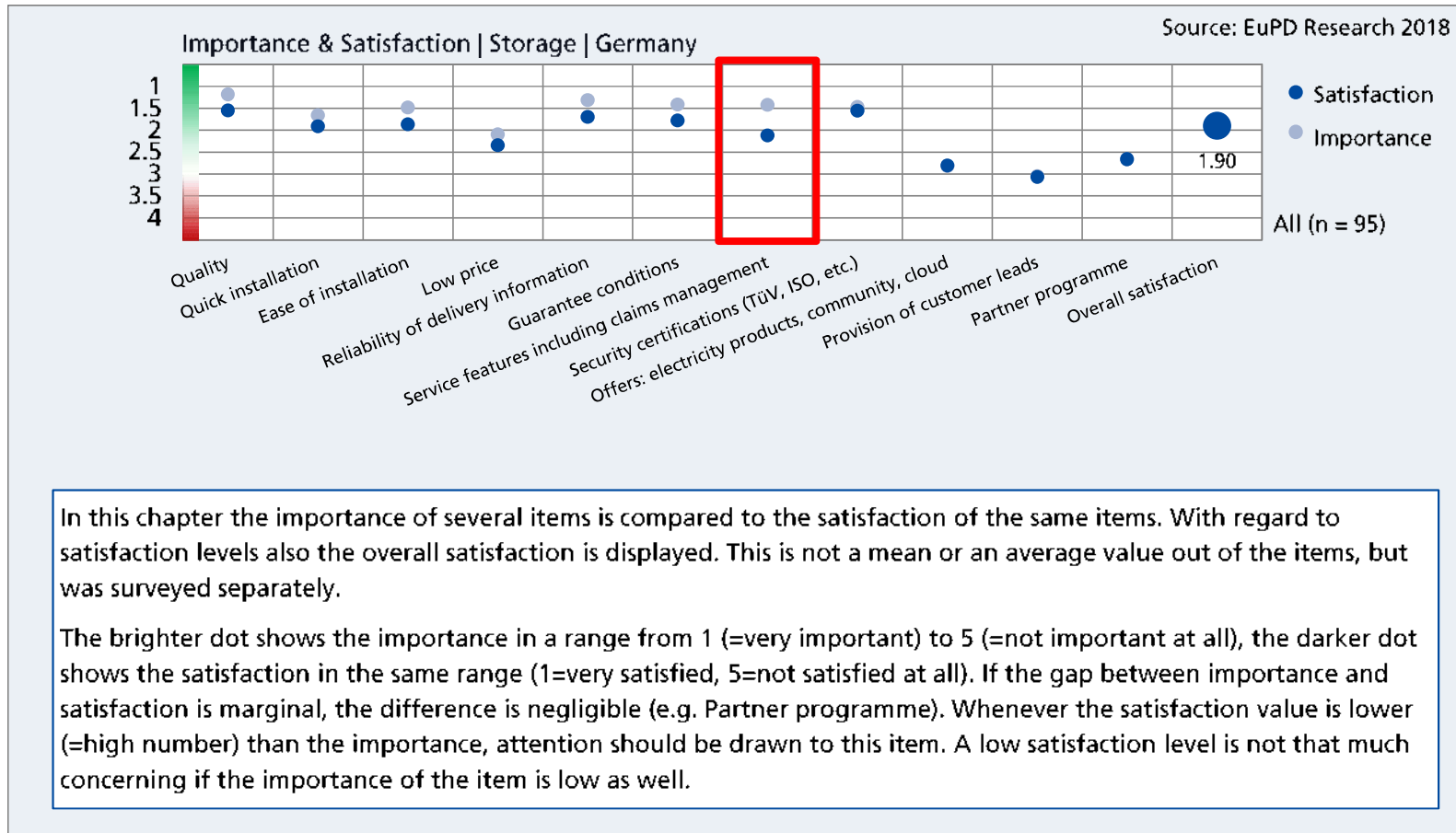
# Satisfaction vs. importance – Storage

- Explanatory remarks – The comparison of importance and satisfaction.



# Satisfaction vs. importance – Storage

- Explanatory remarks – The comparison of importance and satisfaction.



## Satisfaction vs. importance – Storage

---

- European comparison – Most important feature in the decision for a storage brand

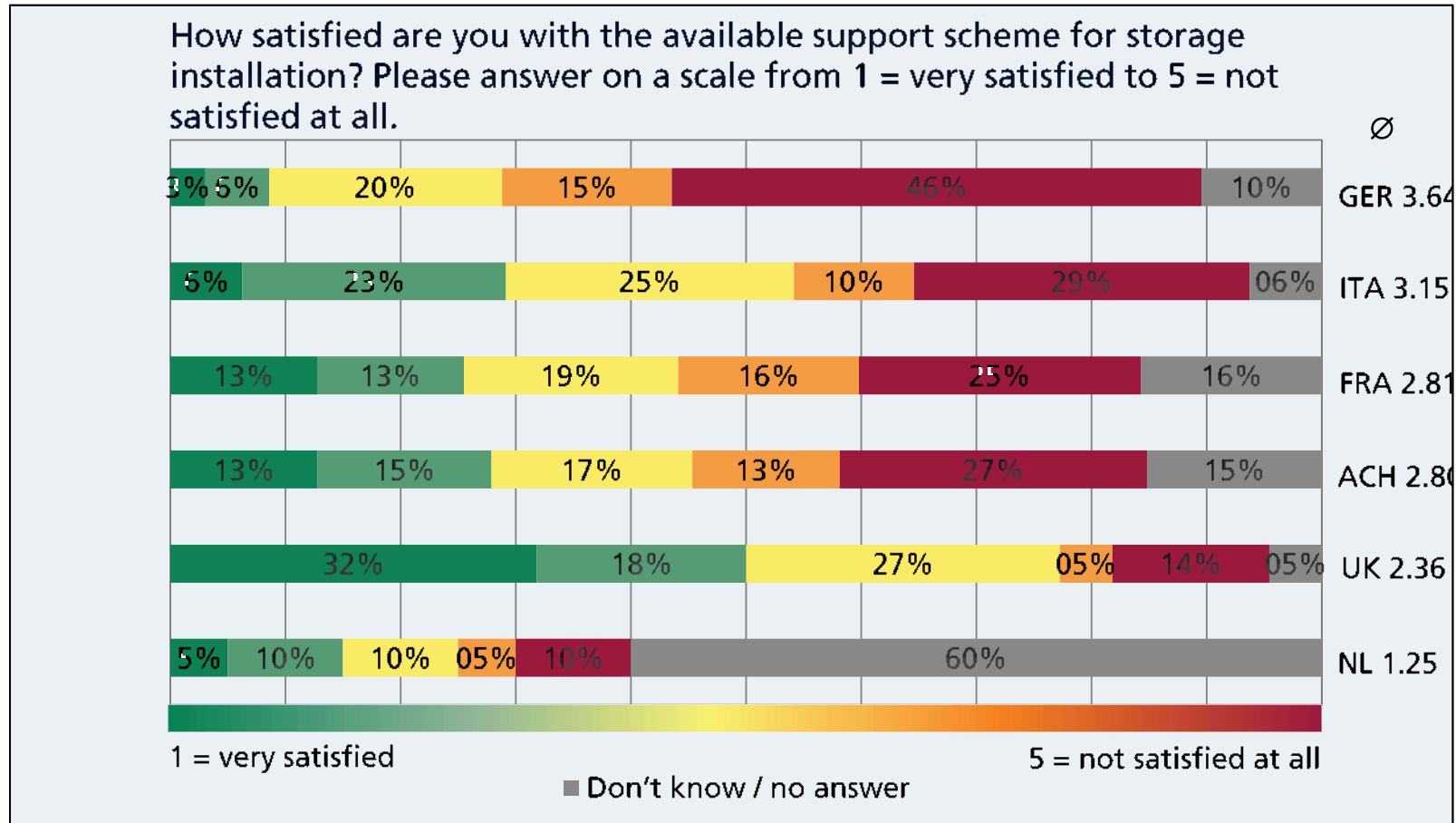
Country	Reason	Overall Satisfaction
NL	Quality (rather unsatisfied)	2,0
GER	Quality (rather unsatisfied)	1,9
ACH	Quality (rather unsatisfied)	1,86
IT	Quality and Guarantee conditions (both rather unsatisfied)	1,72
UK	Quality (marginal gap)	1,68
FR	Quality (marginal gap)	1,36

Source: EuPD Research 2018

## Storage Support Schemes

## Storage support schemes

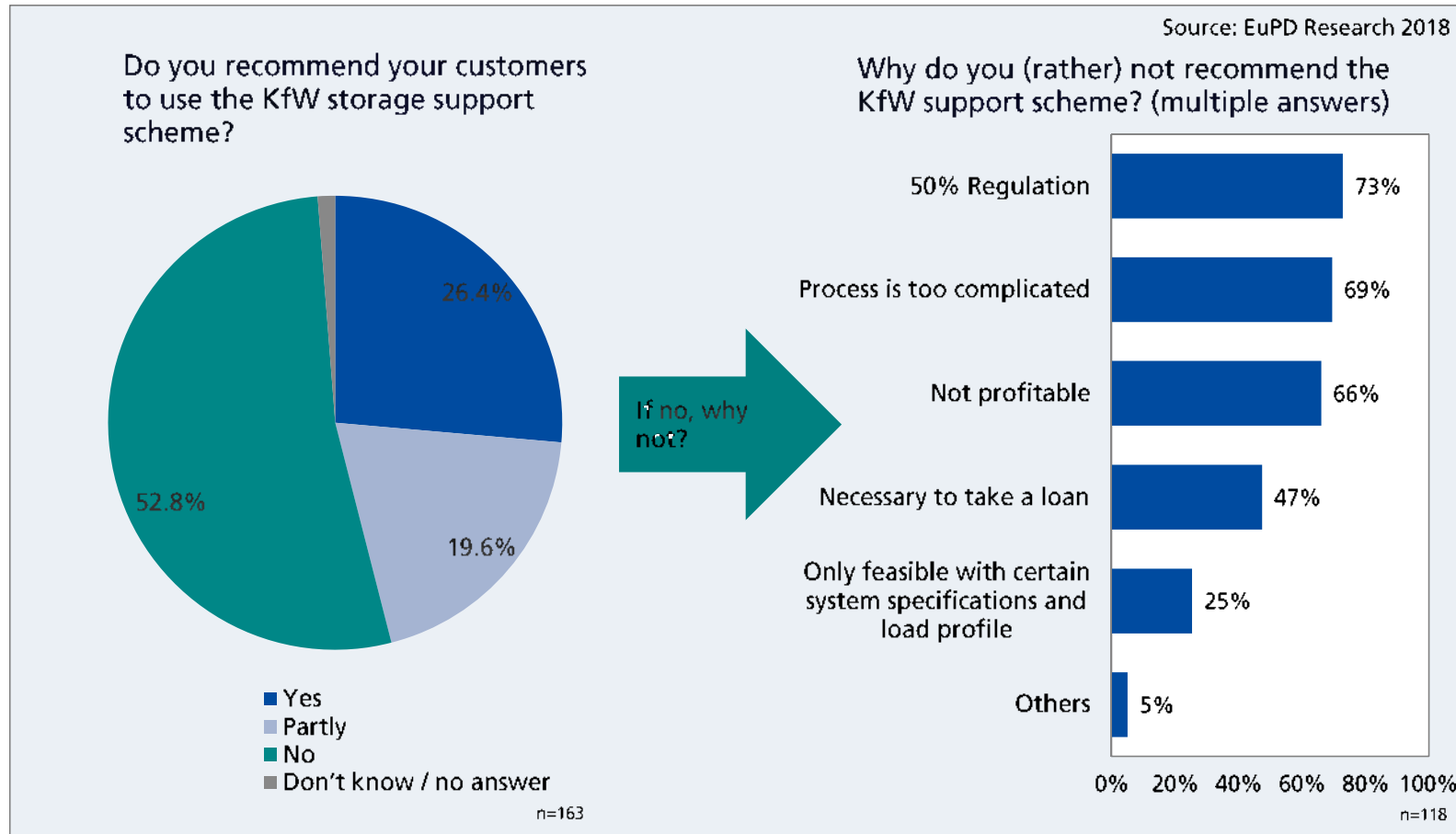
- Almost 50 percent of the German installers are not satisfied at all with the KfW storage support.



Source: EuPD Research 2018

## KfW storage support scheme

- About half of the surveyed installers do not recommend the KfW storage support scheme. The main reason is the 50 percent regulation.

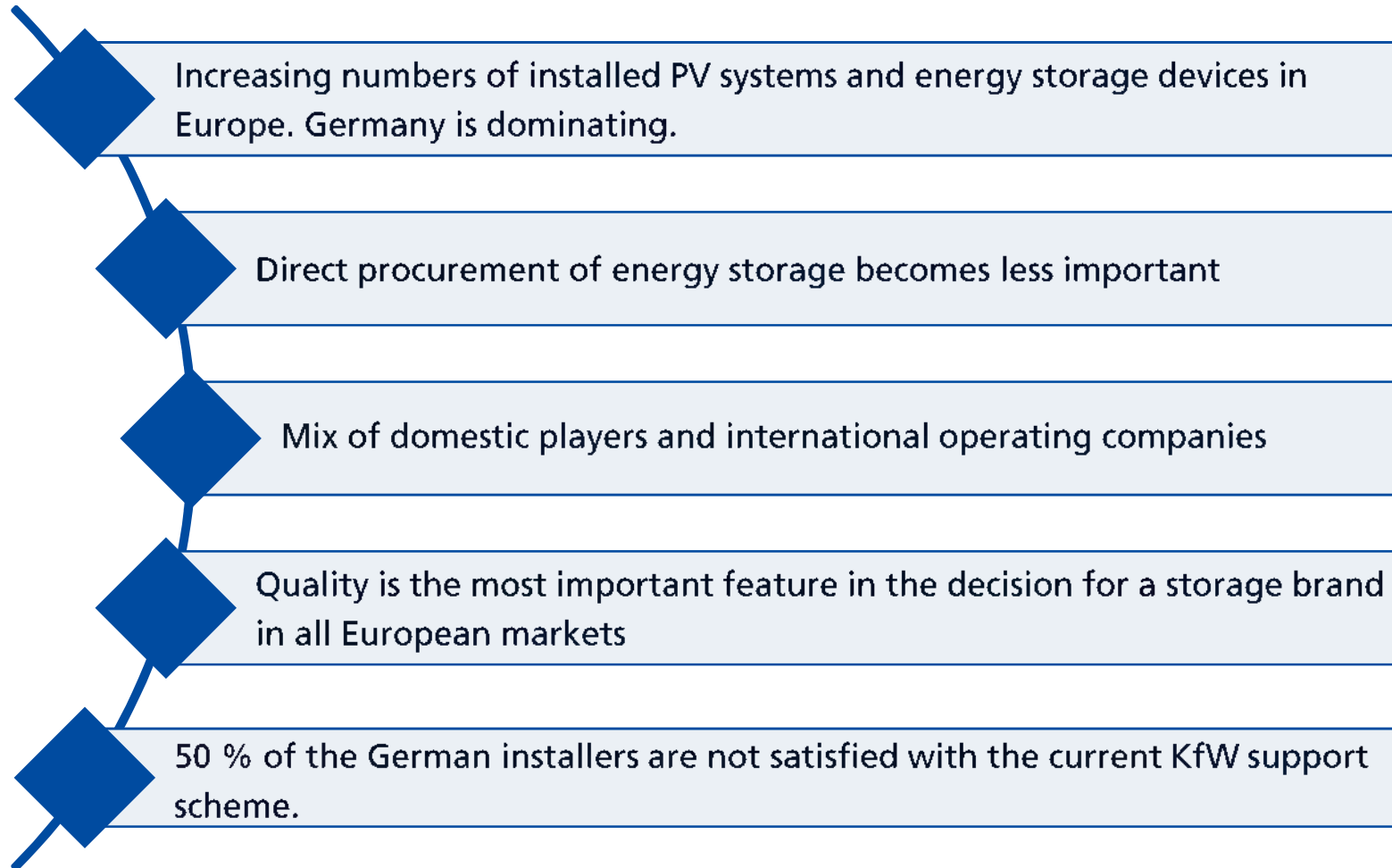




Summary

## Summary

---



# Contact

---

EuPD Research Sustainable Management GmbH  
Adenauerallee 134  
53113 Bonn  
Telephone +49 (0) 228-971 43-0  
Fax +49 (0) 228-971 43-11  
info@eupd-research.com  
www.eupd-research.com

## Contact

Julian Lückerath  
Junior Sales Manager  
j.lueckerath@eupd-research.com



Saif Islam  
Senior Consultant  
s.islam@eupd-research.com

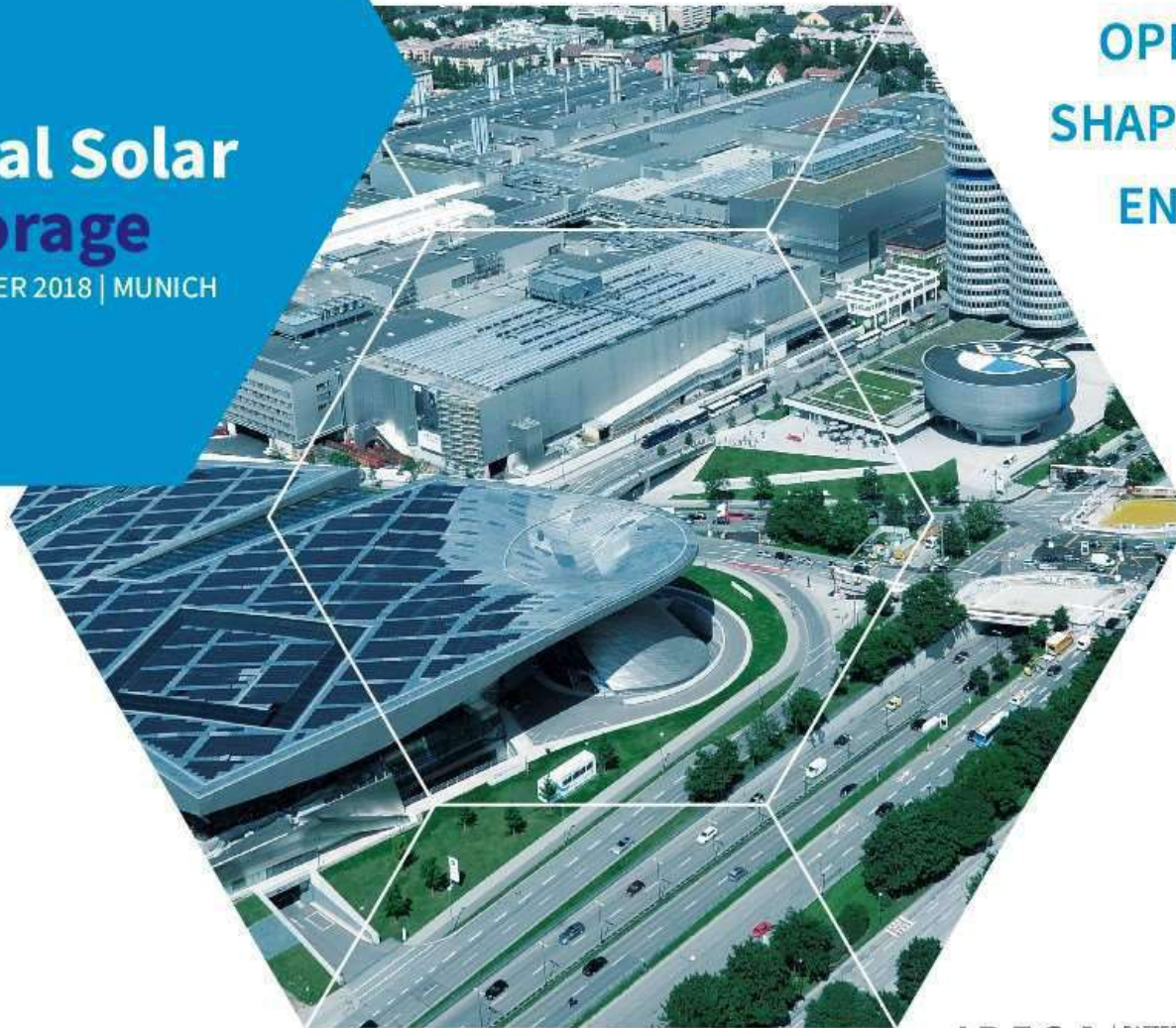




# Digital Solar & Storage

4-5 DECEMBER 2018 | MUNICH

CHALLENGES &  
OPPORTUNITIES  
SHAPING THE NEW  
ENERGY WORLD



organised by



in collaboration with



Sponsored by



SONCE

SUNCONTRACT



[www.digitalsolar-storage.org](http://www.digitalsolar-storage.org)

SolarPower Webinar

# Thank you for attending

