



... focusing on the solar thermal sector

ISOL BUSINESS INDEX: LATEST TRENDS

Average of the company indices

Company indices have been averaged to obtain regional and global indices



Each company index ranges between 0 and 100 points (372 companies participated in Dec 2013)

The average of the 372 company indices makes up the global ISOL Index December 2013 with 386points

ISOL Index surveys started 4 years ago gathering a total of 2,217 filled in questionnaires

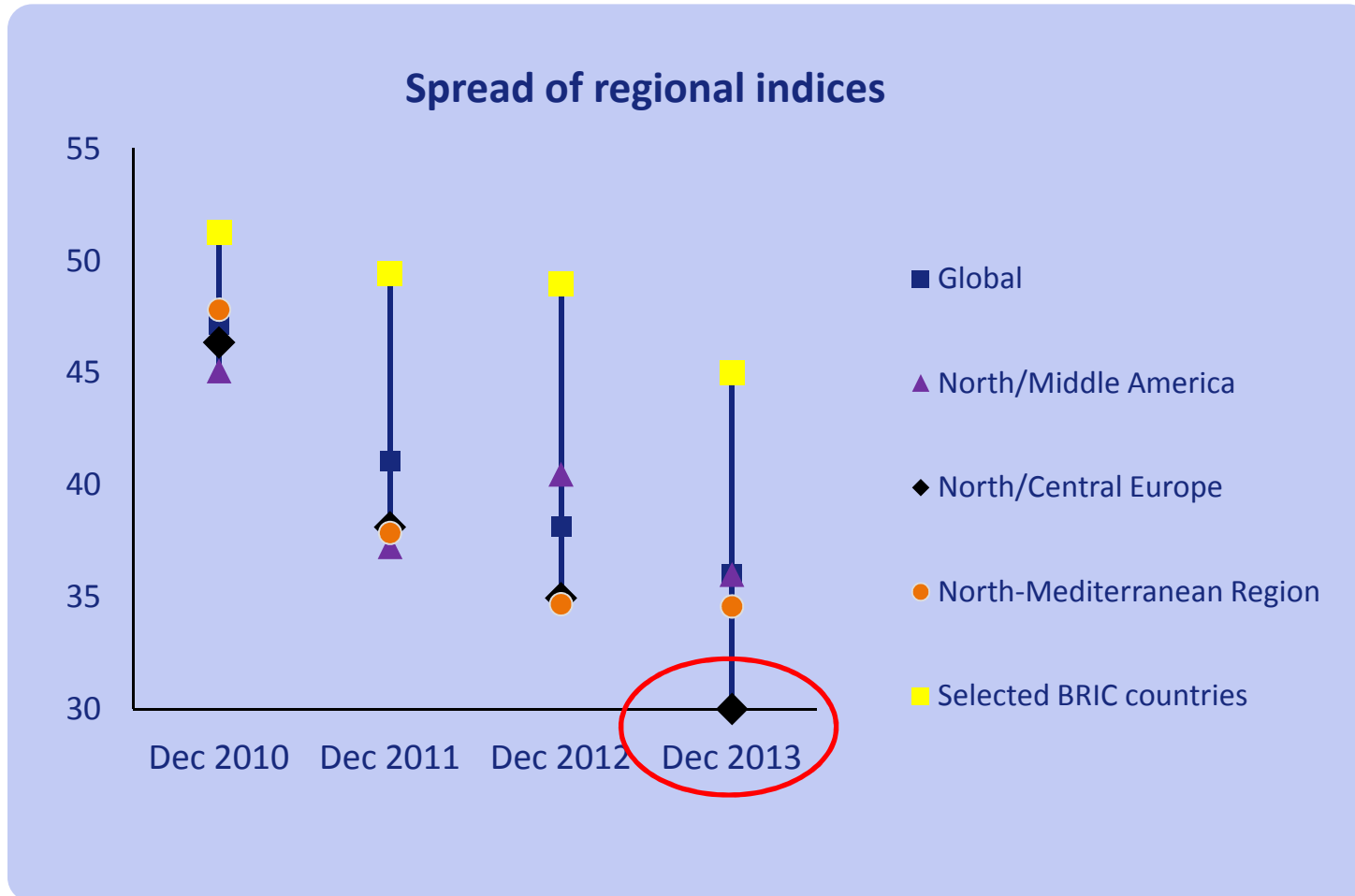
18 countries and 5 regions



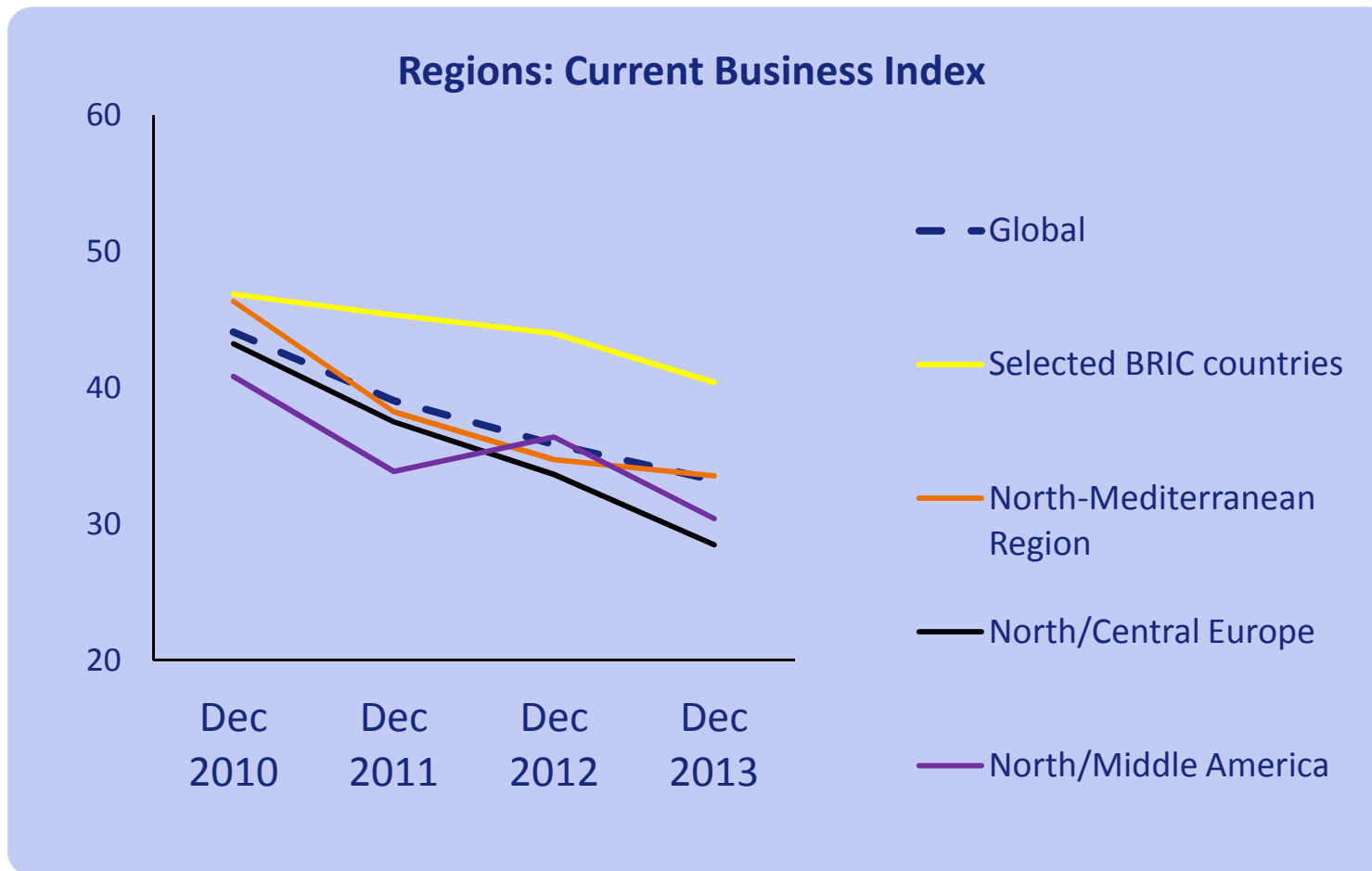
- ▶ **North/Central Europe:** Great Britain, Germany, Austria, Poland, Czech Republic... (109 questionnaires)
- ▶ **North-Mediterranean Region:** Portugal, Spain, France, Italy, Greece, Turkey... (99 questionnaires)
- ▶ **BRIC countries :** Brazil, China, India... (62 questionnaires)
- ▶ **North/Middle America:** USA, Mexico... (37 questionnaires)
- ▶ **New Emerging markets:** Chile, South Africa, Russia, Ukraine and Argentina (38 questionnaires)

**Business satisfaction –
the disparity is growing**

Gap in regional indices



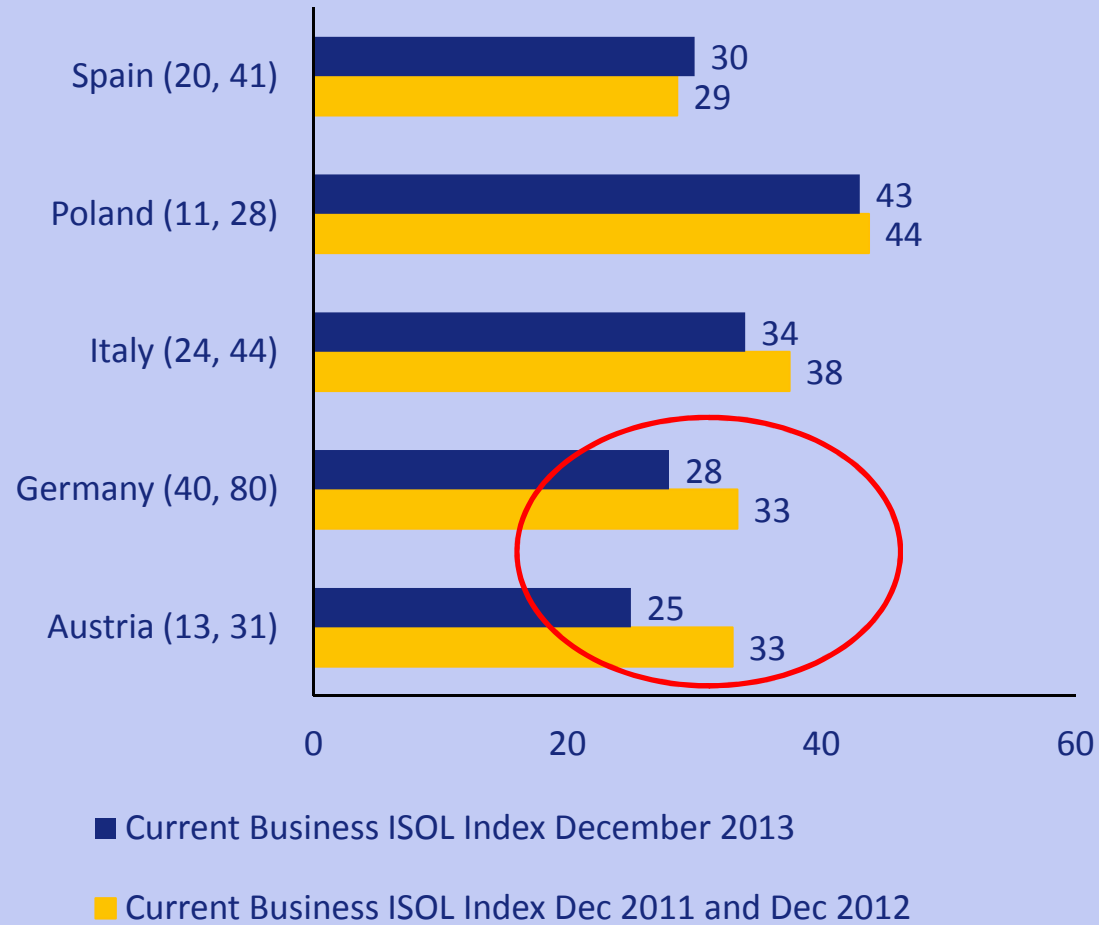
Current Business Indices: Long-term trend in the regions



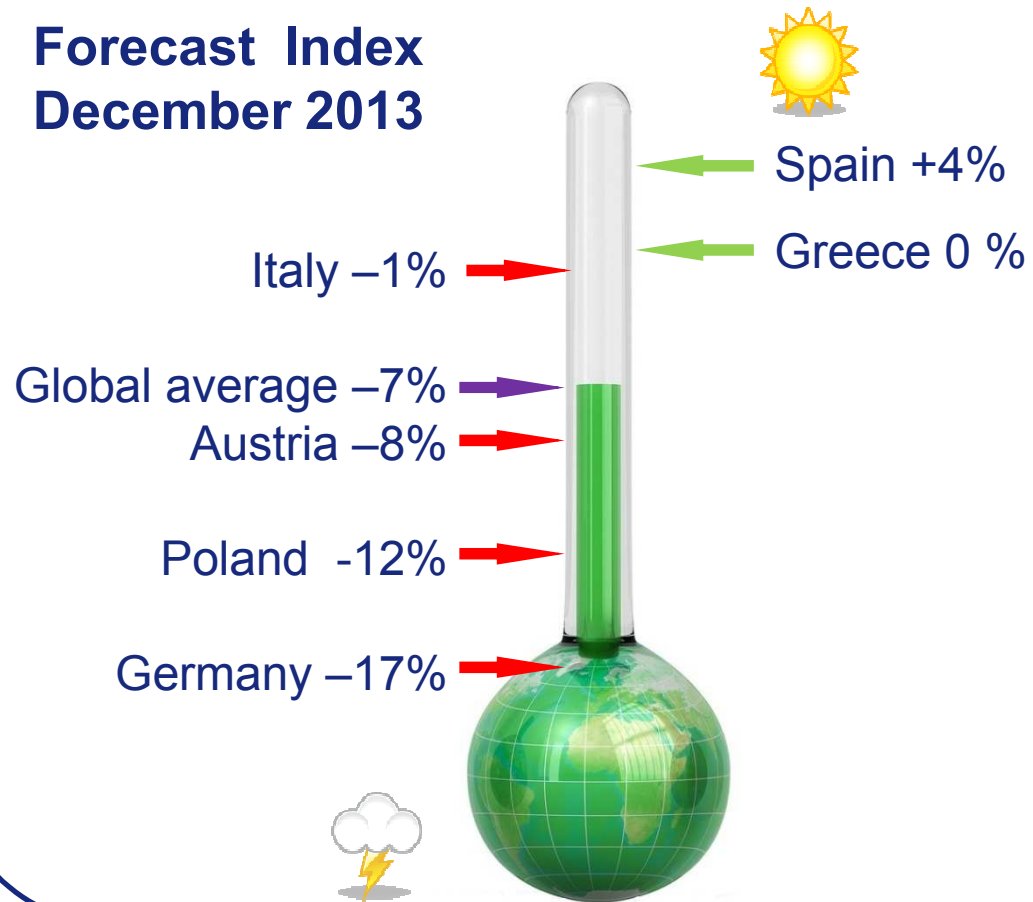
Depressive mood in Germany and Austria

Country ISOL Index = Indicator for market development!

Comparison of Current Business Indices

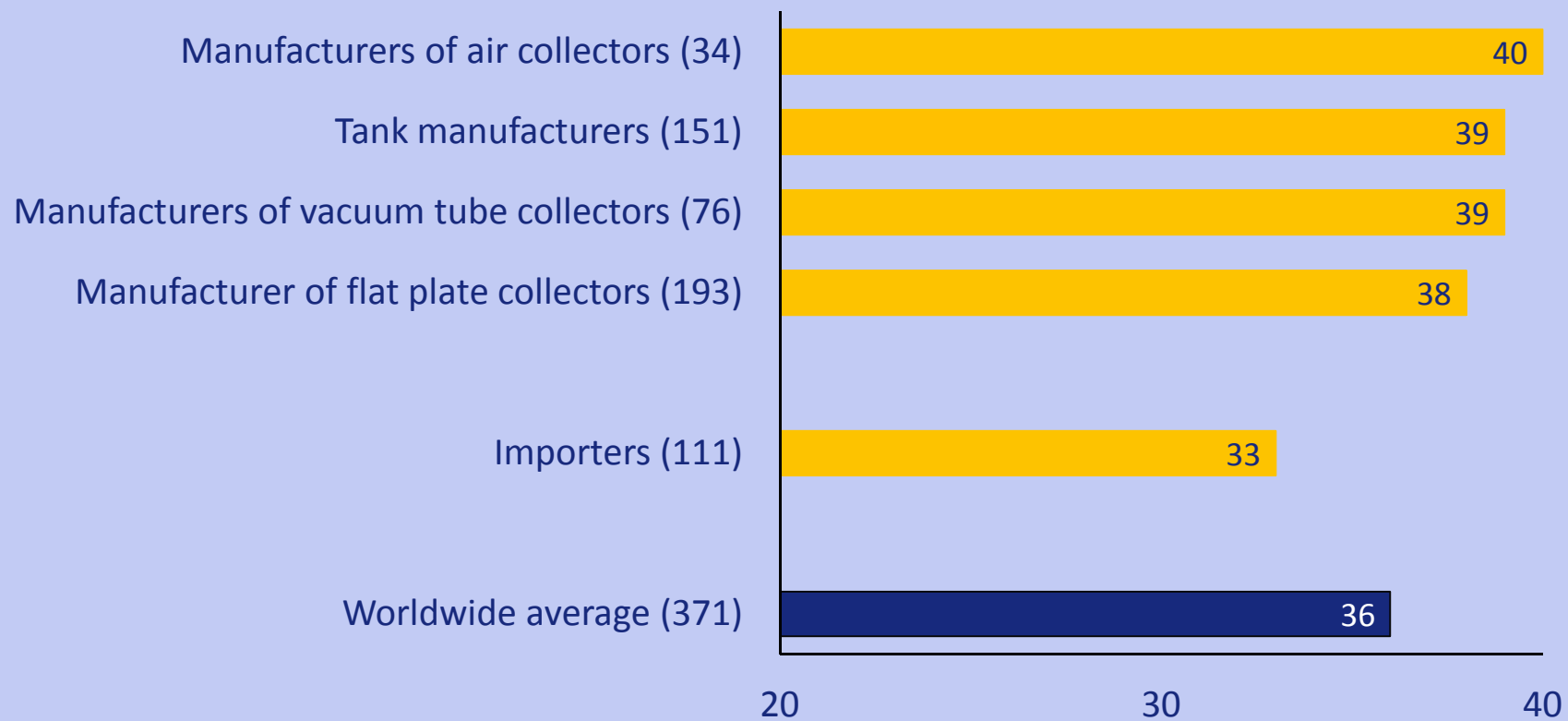


Forecast Index December 2013



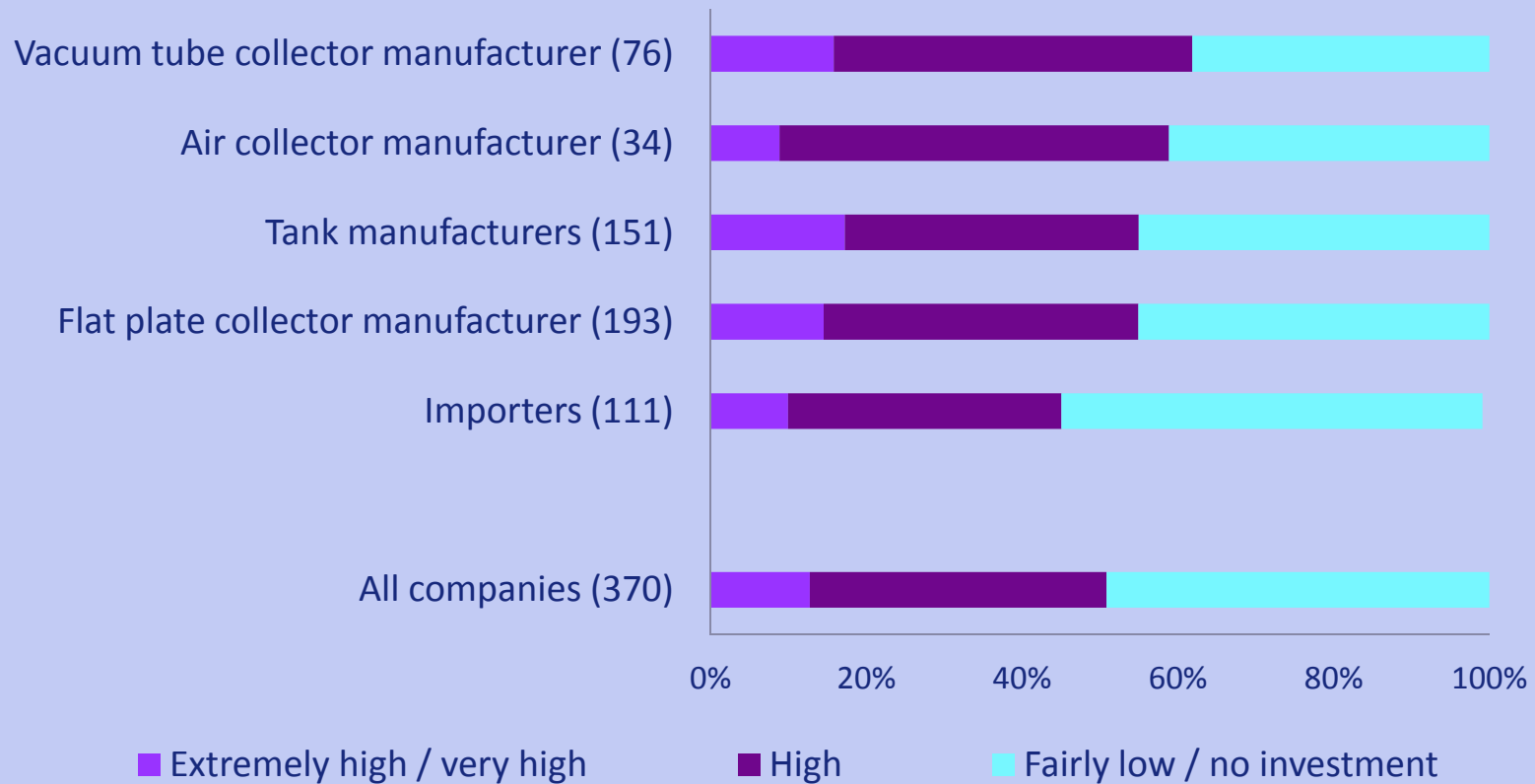
Large portfolio results in higher business satisfaction

ISOL Index December 2013 based on company type



Level of investment based on company type

How would you rate the current level of investments in your solar thermal business?

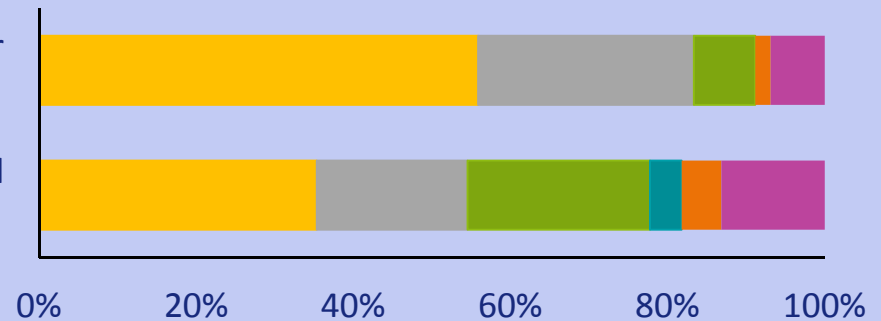


Commercial applications gains importance

Mediterranean Countries

Which market segment has the highest share in your sales in 2013?

What is the fastest growing segment in your national market?

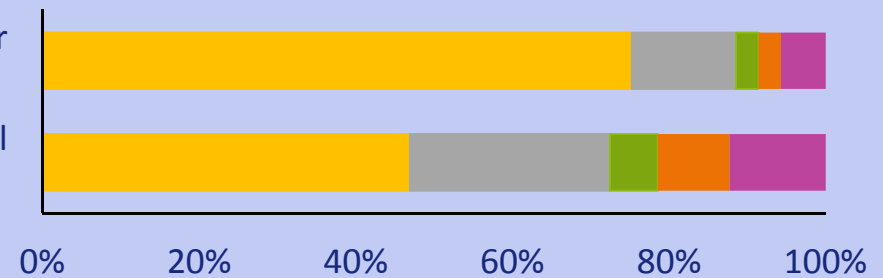


■ Single-family houses
 ■ Multi-family houses
 ■ Tourism sector
 ■ Solar Cooling
 ■ Process heat
 ■ Public sector

North / Central Europe

Which market segment has the highest share in your sales in 2013?

What is the fastest growing segment in your national market?



Solar plus heat pump makes the race

Mediterranean Countries

Which system type has the highest share in your sales in 2013?



Which type of systems experience the fastest growth in your national market?



0% 20% 40% 60% 80% 100%

■ Thermosiphon systems

■ Pumped hot water systems

■ Combi systems

■ Roof integration

■ Solar plus heat pump

North / Central Europe

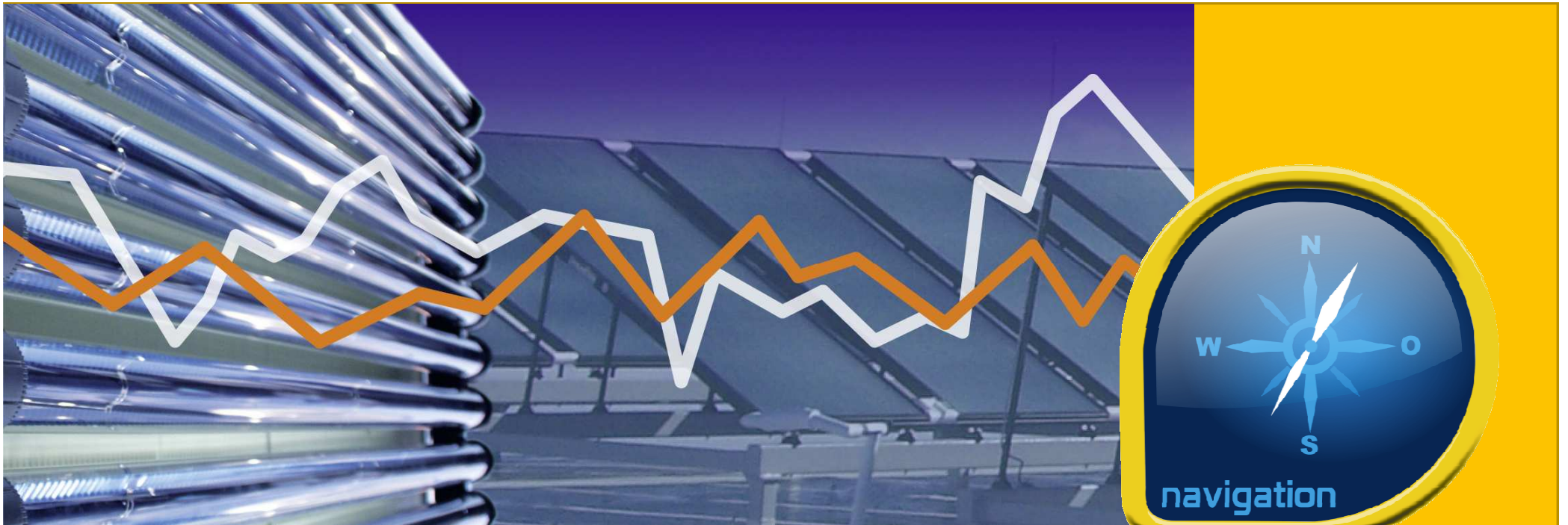
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Thanks for your attention!

For all further questions:

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