



TASK 2 – MARKETS (DRAFT)

2nd Stakeholder Meeting, Ecodesign Preparatory Study for Lifts

Technical team leader:

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ISR-University of Coimbra



Waide Strategic Efficiency



Fraunhofer
ISI



IMPORTANT NOTE ON STAKEHOLDER FEEDBACK

Please be aware that this is a draft consultation document that is only published for the purpose of receiving stakeholder comments. The underlying report may still undergo substantial revisions prior to being released as a final report of this preparatory study.

All stakeholders are invited to submit feedback using the default feedback form available in the download section of the project website at www.eco-lifts.eu.

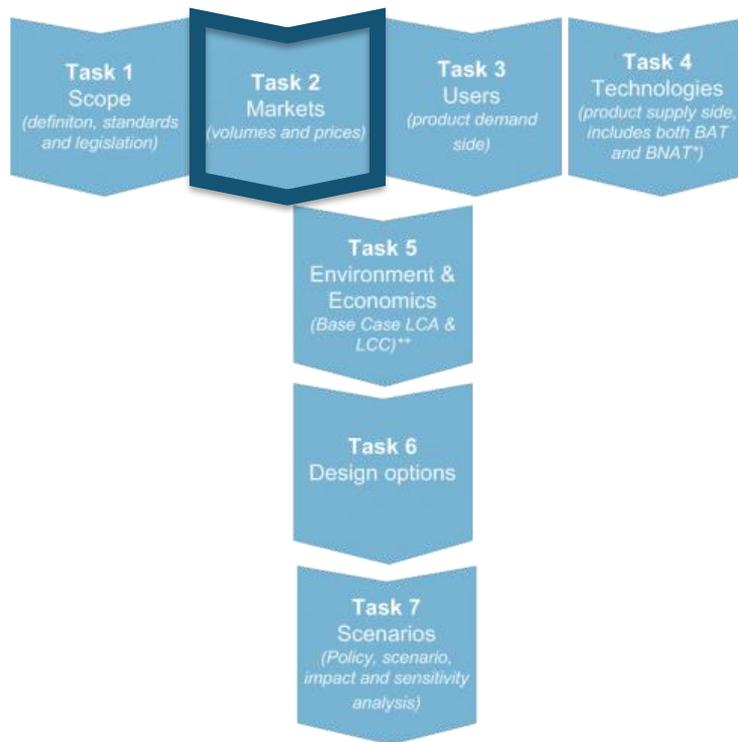
For references, please see the draft report.



TASK STRUCTURE

Project team members involved in Task 3 preparation

- Authors: A. Soares, P. Van Tichelen (Vito)
- Review: P. Waide (Waide Strategic Efficiency)



Aim of Task 2 (volumes and prices)

- present an economic and market analysis of lifts according to the definition presented in Task 1
 - place lifts within the context of EU industry and trade policy
 - provide market size and cost inputs for the EU-wide environmental impact assessment of the product group
 - provide insight into the latest market trends to help assess the impact of potential Ecodesign measures with regard to market structures and ongoing trends in product design
 - provide a practical data set of prices and rates to be used for LCC calculations

TASK 2

- **Objective**
- Present an economic and market analysis of lifts.

- **Methodology**
- Data collection from different sources such as ELA, ELCA and the E4 Project;
- Extrapolation and calculations to distribute the data according to ISO 25745-2:2015;
- Feedback from relevant stakeholders.

- **Subtasks**
- Subtask 2.1: Generic economic data
- Subtask 2.2: Market and stock market
- Subtask 2.3: Market trends
- Subtask 2.4: Consumer expenditure base data
- Subtask 2.5: Recommendations

- **Output**
- Economic and market analysis of lifts.

MAIN OBJECTIVES OF TODAY'S MEETING

- **We want...**
 - ...to inform you about the work on the preparatory study;
 - ...to communicate the changes that we did;
 - ...to get your feedback.

- **Overview of the changes does not include**
 - Minor changes;
 - Formatting issues;
 - Non specific remarks;
 - Informative comment, not applicable comments.

- **but includes**
 - Major comments;
 - Main changes.

Stakeholders' feedback

- **Feedback received included:**

1. Answers to specific questions that we had in the original document;
2. Comments about the reliability and up-to-date market size;
3. Comments about the reliability and up-to-date data extracted based on the PRODCOM codes;
4. Comments on new lifts definition, lifetime, product life and renovation/sales rate;
5. Comment on the amount of lifts installed in 2016 which is below 200 000 (stated limit for the product to be relevant for an Ecodesign study);
6. Discussion on maintenance costs.
7. Minor typos.

TASK 2

Main changes based on stakeholders' feedback

1. Answers to specific questions that we had in the original document;
 - Stakeholders were not able to answer some of the questions, in particular those concerning PRODCOM codes, maintenance costs, disaggregation between top and grounded supported lifts
 - ➔ *data from PRODCOM (as much as possible) + disaggregation between top and grounded supported lifts were dropped*
 - Note:** *indicative prices for some important lifts' component repairs or upgrades were however kept until since the source is considered to be reliable (FOD Economie) and no better estimations were obtained*
2. Comments about the reliability and up-to-date market size + use of data from the E4 Project and extrapolation to fit the usage categories;
 - Text was added to explain the rational behind the data extrapolation.
3. Comments about the reliability and up-to-date data extracted based on the PRODCOM codes;
 - Data from PRODCOM was removed as much as possible from the document since we got several comments asking not to use it.

TASK 2

Main changes based on stakeholders' feedback

4. Comments on new lifts definition, lifetime, product life and renovation/sales rate;
 - Notes were added to clarify these aspects.
 - Two scenarios with two different renovation rates are used:
 - ❖ average = 68 years equivalent to a sales rate of 1.46 %

	1995	2005	2015	2025	2035	2045
non residential new building sales rate	1,100%	1,100%	1,1000%	1,100%	0,500%	0,500%
non residential renovation sales rate(assumption)	1,461%	1,461%	1,4614%	1,461%	1,461%	1,461%
residential new building sales rate	0,800%	0,800%	0,8000%	0,700%	0,500%	0,300%
residential renovation sales rate(assumption)	1,461%	1,461%	1,4614%	1,461%	1,461%	1,461%

- ❖ 'accelerated renovation scenario' = 3% based on the recast of the EPBD Directive

	1995	2005	2015	2025	2035	2045
non residential new building sales rate	1,100%	1,100%	1,1000%	1,100%	0,500%	0,500%
non residential renovation sales rate(assumption)	1,461%	1,461%	1,4614%	3,000%	2,500%	2,000%
residential new building sales rate	0,800%	0,800%	0,8000%	0,700%	0,500%	0,300%
residential renovation sales rate(assumption)	1,461%	1,461%	1,4614%	3,000%	2,500%	2,000%

TASK 2

Main changes based on stakeholders' feedback

5. Comment on the amount of lifts sales in 2016 which is below 200 000 (stated limit for the product to be considered relevant for an Ecodesign study);
 - The Ecodesign working plan 2016-2019 study considered lifts relevant despite below 200 K/y sales because of the potential cumulative impact in TWh/y.
6. Minor typos.
 - The document was checked and typos corrected.

THANK YOUR FOR YOUR ATTENTION

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