BRAZIL: SELECTED FINDINGS

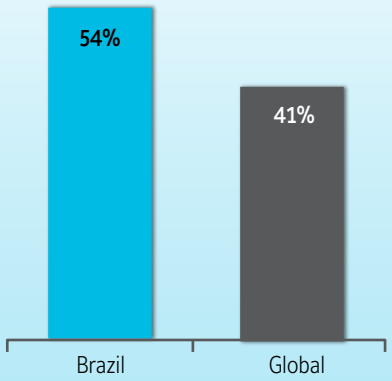
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The survey has been conducted annually since 2006. This was the third year in which it included Brazil, and it drew 233 respondents. The complete analysis of the Brazil survey results will be announced at the Green Building Brazil International Conference in Sao Paulo on Aug. 27, 2013.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- Brazil saw a significant increase in executives (52%) who said they were paying "a lot more attention" to energy efficiency than last year.
- Last year, Brazil's respondents were significantly higher than the global average in terms of those who said energy management was "extremely important" to their organizations. This year, that figure increased slightly to 54% and again is higher than the global average (41%).
- Executives in Brazil indicated that the main drivers for pursuing energy efficiency were energy cost savings, energy security (availability, reliability, and security of supply), customer attraction and retention, greenhouse gas footprint reduction, and brand or public image. Brazil is a leader in citing greenhouse gas reduction as an important driver for action, along with India, Singapore and the United Kingdom.
- There was a fairly even split among Brazil's respondents on the top barrier to action. Lack of awareness about the opportunities was the lowest concern. Lack of technical expertise to evaluate the choices, uncertainty about the performance of actions taken, internal financial requirements, and funding availability all represented barriers to respondents.
- Lighting and solar thermal technologies were expected to have the greatest increase in market adoption over the next 10 years. Brazil was among the few markets where more than 20% of respondents saw electric cars and small on-site wind generation technologies having the greatest increase in market adoption in the next decade.

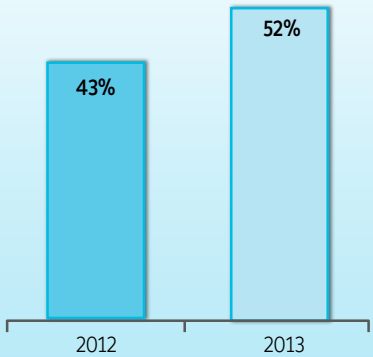
RESULTS: BRAZIL

Importance of Energy Management



How important is energy management to your company/organization? (Extremely important)

Attention to Energy Efficiency



Compared to 12 months ago, how much attention is your company/organization paying to energy efficiency now? (Paying a lot more attention)

BRAZIL: SELECTED FINDINGS

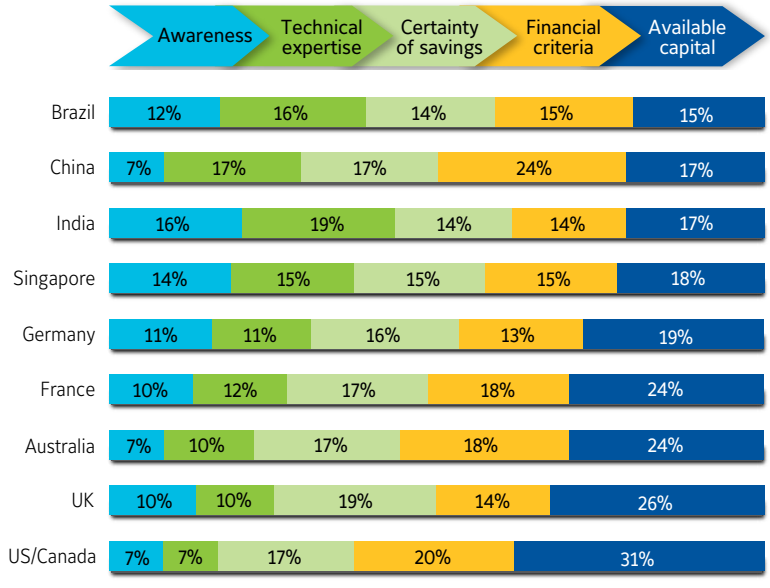
Drivers of efficiency

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Energy cost savings	1	1	1	1	1	1	1	1	1
Government and utility incentives/rebates	2	2	4	2				2	2
Increased asset value	3	5		3				3	
Energy security	5	3	2	5	2	2	2		
Customer attraction and retention			5		3	3	5	4	
Existing government policy							3	5	3
Enhanced brand or public image	4		3	4	5	5	4		5
GHG footprint reduction		4			4				
Enhanced brand or public image						4			4

Which of the following on-site technologies do you expect to have the greatest increase in market adoption over the next ten years?

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Lighting technologies	54%	40%	33%	22%	35%	33%	23%	36%	46%
Smart building technology	34%	24%	27%	22%	26%	32%	37%	31%	35%
Advanced building materials	31%	25%	23%	29%	24%	23%	32%	37%	25%
Solar photovoltaics (PV)	22%	21%	32%	26%	26%	28%	35%	25%	26%
Solar thermal		22%	24%	26%	34%	29%	36%	19%	23%
Electric and plug-in electric vehicles	23%		25%		22%		26%		19%
Advanced cooling technologies	20%		15%		19%	21%			19%
Small wind generators					21%	19%			
Geothermal/ground source heat pumps				27%					

What is the top barrier to pursuing energy efficiency for your organization?



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The Institute for Building Efficiency is an initiative of Johnson Controls providing information and analysis of technologies, policies, and practices for efficient, high performance buildings and smart energy systems around the world. The Institute leverages the company's 125 years of global experience providing energy efficient solutions for buildings to support and complement the efforts of nonprofit organizations and industry associations. The Institute focuses on practical solutions that are innovative, cost-effective and scalable.

If you are interested in contacting the authors, or engaging with the Institute for Building Efficiency, please email us at: InstituteforBE@jci.com.

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