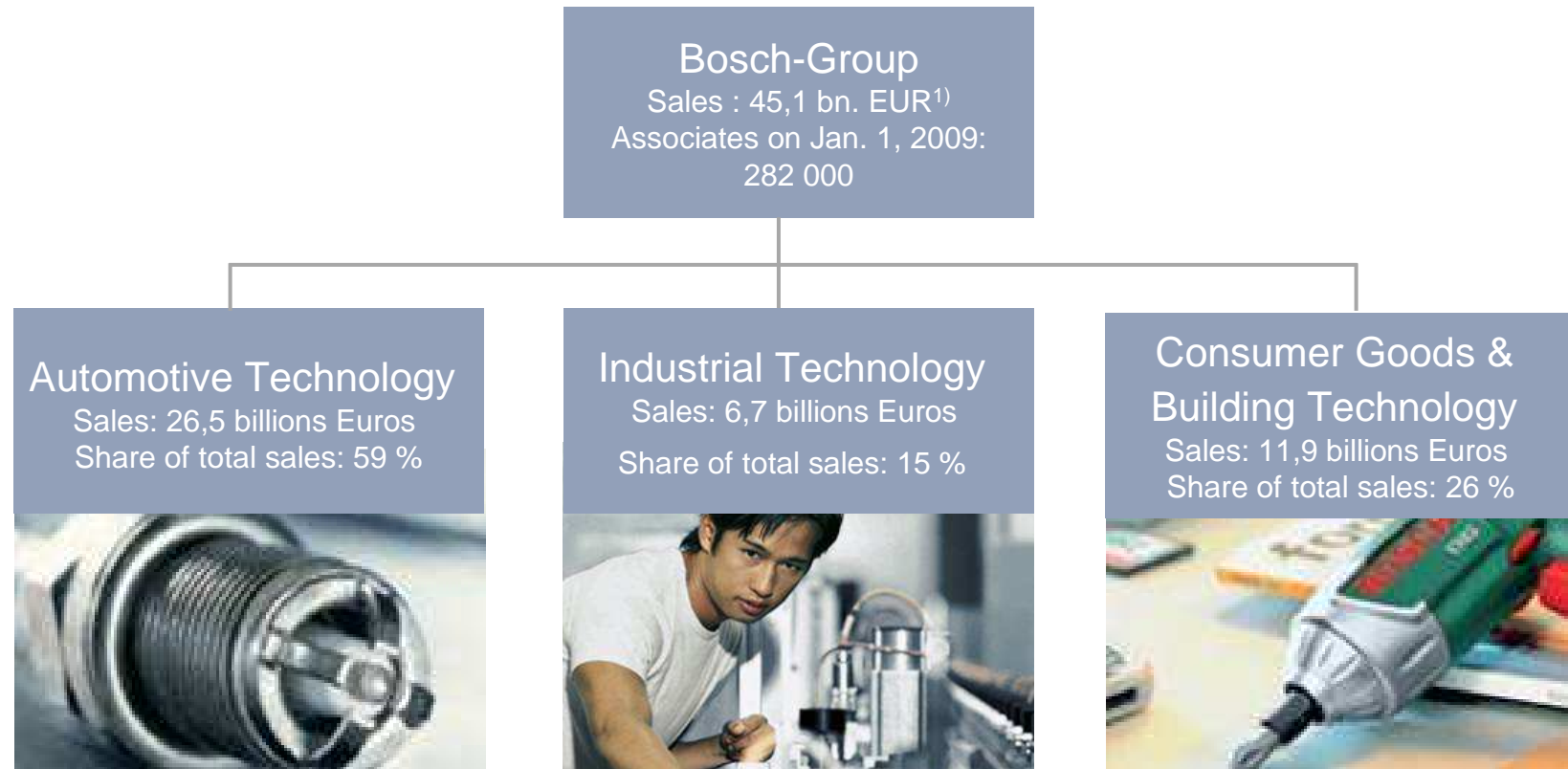


## Invented for life



<sup>1)</sup> Including other business areas

### Thermotechnology

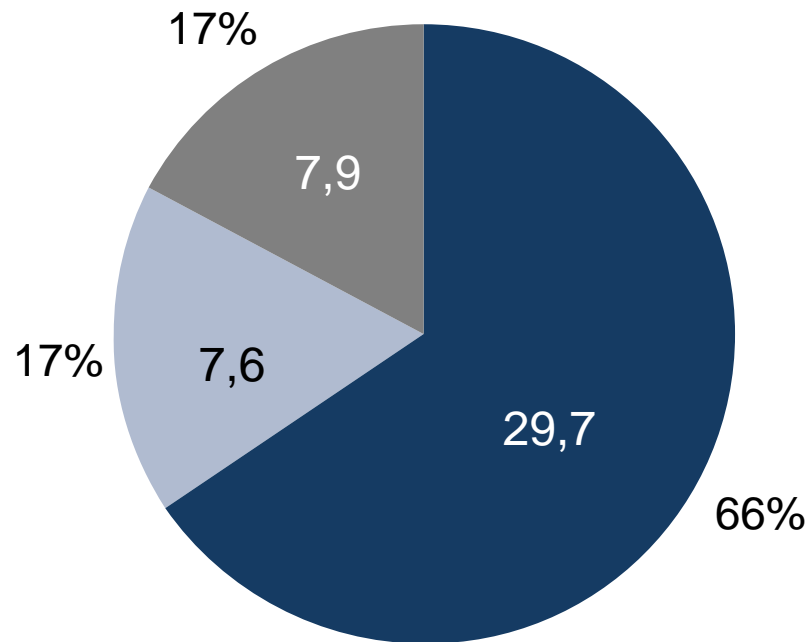
Intern | TT/OFE-Hg | 07.07.2009 | © Bosch Thermotechnik GmbH 2009. Alle Rechte vorbehalten, auch bzgl. jeder Verfügung, Verwertung, Reproduktion, Bearbeitung, Weitergabe sowie für den Fall von Schutzrechtsanmeldungen.



## 1. Robert Bosch GmbH

# Sales Bosch-Group 2008

By region in billion Euro / percent



Europe

America

Asia-Pazific<sup>1)</sup>

**Shares out of Germany 74%**  
**Overall: 45,1 bn. EUR<sup>1)</sup>**

<sup>1)</sup> Including other countries

# Thermotechnology within the Bosch Group

## Robert Bosch GmbH

Business sector  
Consumer Goods and  
Building Technology

Business sector  
Industrial  
Technology

Business sector  
Automotive  
Technology

Thermotechnology division  
Bosch Thermotechnik GmbH

overall 16  
business sectors at Bosch

Regional companies of  
Bosch Thermotechnik GmbH

6 Business units  
6 Sales regions



# Bosch Thermotechnology

Solid Fuel Boiler

Gas- Water  
Heater

Gas- / Oil-Boiler  
Wall-hanging

Central  
Heatpumps

Decentralized  
Energy Management

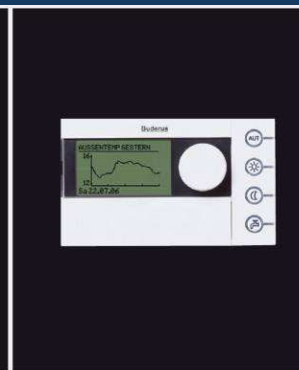
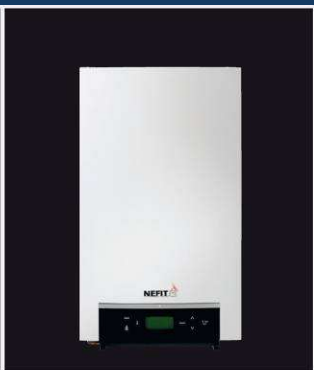
Industrial Boiler  
High Output

Gas- / Oil-Boiler  
Floor- Standing

Solar Thermal  
PV Collectors

Combined  
Heat and Power

Accessories  
Components



## Thermotechnology



## Current market situation

# Market segments of Bosch Thermotechnology

Bosch Thermotechnology market segments	Domestic Hot Water	Heating	Ventilation Air Conditioning (VAC)	Decentralized energy generation
	<ul style="list-style-type: none"> <li>- Gas-Water-Heater</li> <li>- Solar Thermal</li> <li>- Cylinders (Storage)</li> <li>- Electrical Hot water</li> <li>- CO<sub>2</sub> Heatpumps</li> </ul>	<ul style="list-style-type: none"> <li>- Gas/Oil boilers</li> <li>- Industrial boilers (High output)</li> <li>- Solid fuel boilers</li> <li>- Electrical Heatpumps</li> <li>- Electrical boilers</li> </ul>	<ul style="list-style-type: none"> <li>- Central Heatpumps (FHP)</li> <li>- High efficiency VAC-solution</li> </ul>	<ul style="list-style-type: none"> <li>- CHP<sup>1</sup></li> <li>- PV</li> <li>- DEM<sup>2</sup></li> </ul>
				Room HVAC products
				<ul style="list-style-type: none"> <li>- Radiators</li> <li>- Floorheating</li> </ul>

Thermotechnology

<sup>1</sup> Combined Heat and Power

<sup>2</sup> Decentralized Energy Management

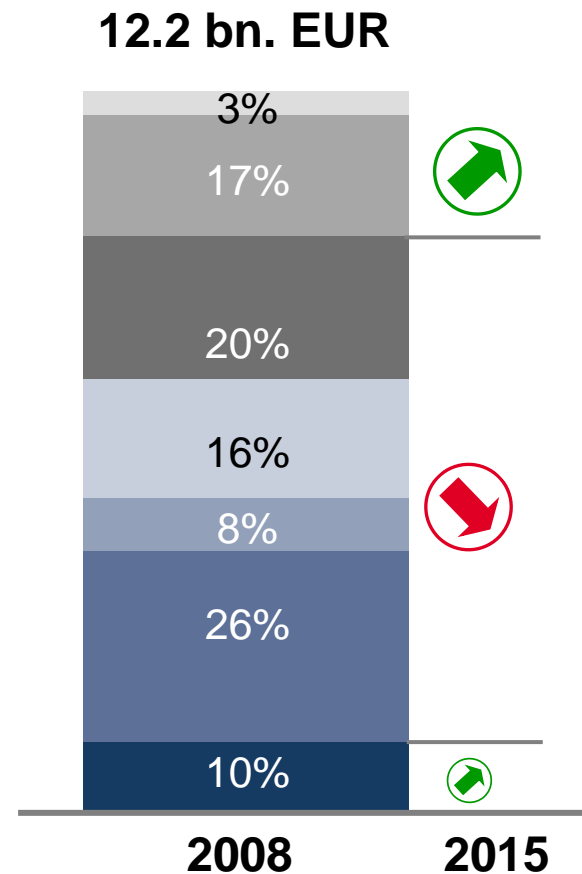


## Current market situation

### World market: Hot Water

- **Solar storage**
- **Solar collectors**
- Gas Instantaneous Water Heater
- **Gas Storage Tank**
- **Electric Instantaneous Water Heater**
- Electric Storage Tank
- **Electric Heat Pump Warm Water**

- 📈 Market growth
- 📉 Decreasing Market shares

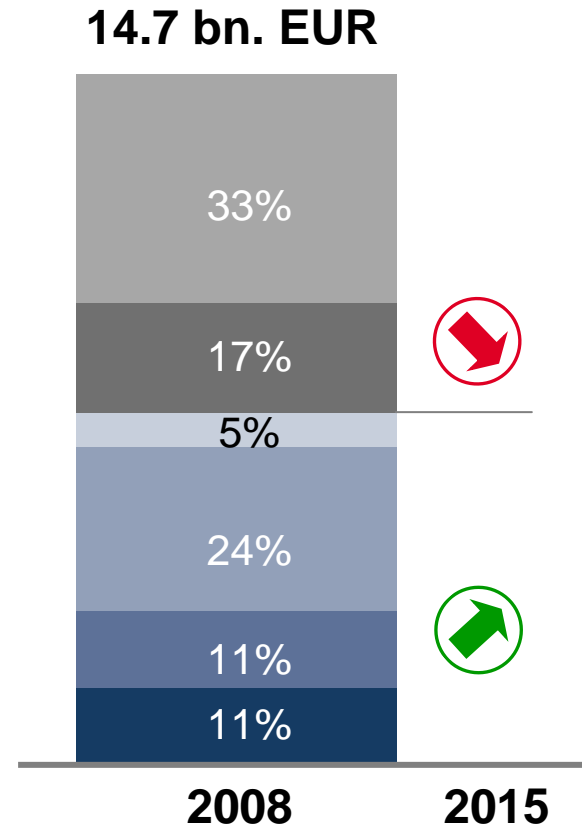


## Current market situation

### World market: Heating

- Wall mounted boilers
- Floor standing boilers
- Solid fuel boilers
- Commercial/Industrial Boilers
- Electric Heat Pump
- Furnaces

- ↗ Market growth
- ↘ Decreasing Market shares

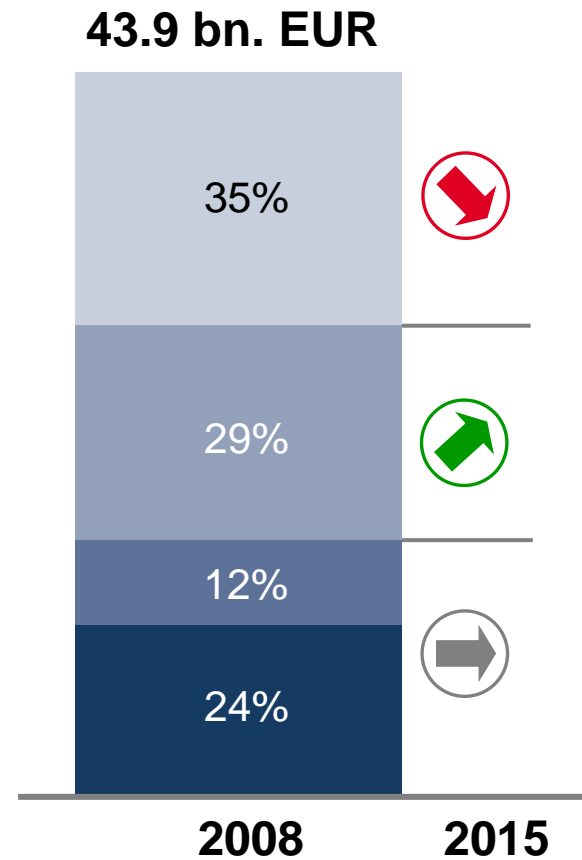


## Current market situation

### World market: VAC

- Local < 5 kW
- Local > 5 kW
- Central < 5kW
- Central >5 kW

- constant
- Market growth
- Decreasing Market shares



# Bosch Thermotechnology

## Brand portfolio

International  
brands



National /  
Regional  
brands



Thermotechnology



# Bosch Thermotechnology

## Sales channels

Independent  
Wholesale



Own  
Wholesale /  
Direct Sales

**Buderus**

**IVT**

**LOOS  
INTERNATIONAL**

Professional  
Customers:

Installers,  
heating engineers,  
planning offices,  
etc.

(End Customers)



## Renewable energies

# The world is getting green

### Europe

- -20 % CO<sub>2</sub> until 2020
- In many states attractive subsidies by using energy efficient systems

### G8-States

- -50 % CO<sub>2</sub> until 2050

### China

- 35 % renewable energies until 2020

### USA

- 15 % renewable energies
- High tax credit for solar and heatpumps

