

Heat Pump Markets

UK in Europe



IEA Heat Pump Workshop

13. November 2012

Zoltan Karpathy

Agenda



 About BSRIA WMI

UK in the European Heat Pump Market

Heating Technologies in New and Existing Buildings

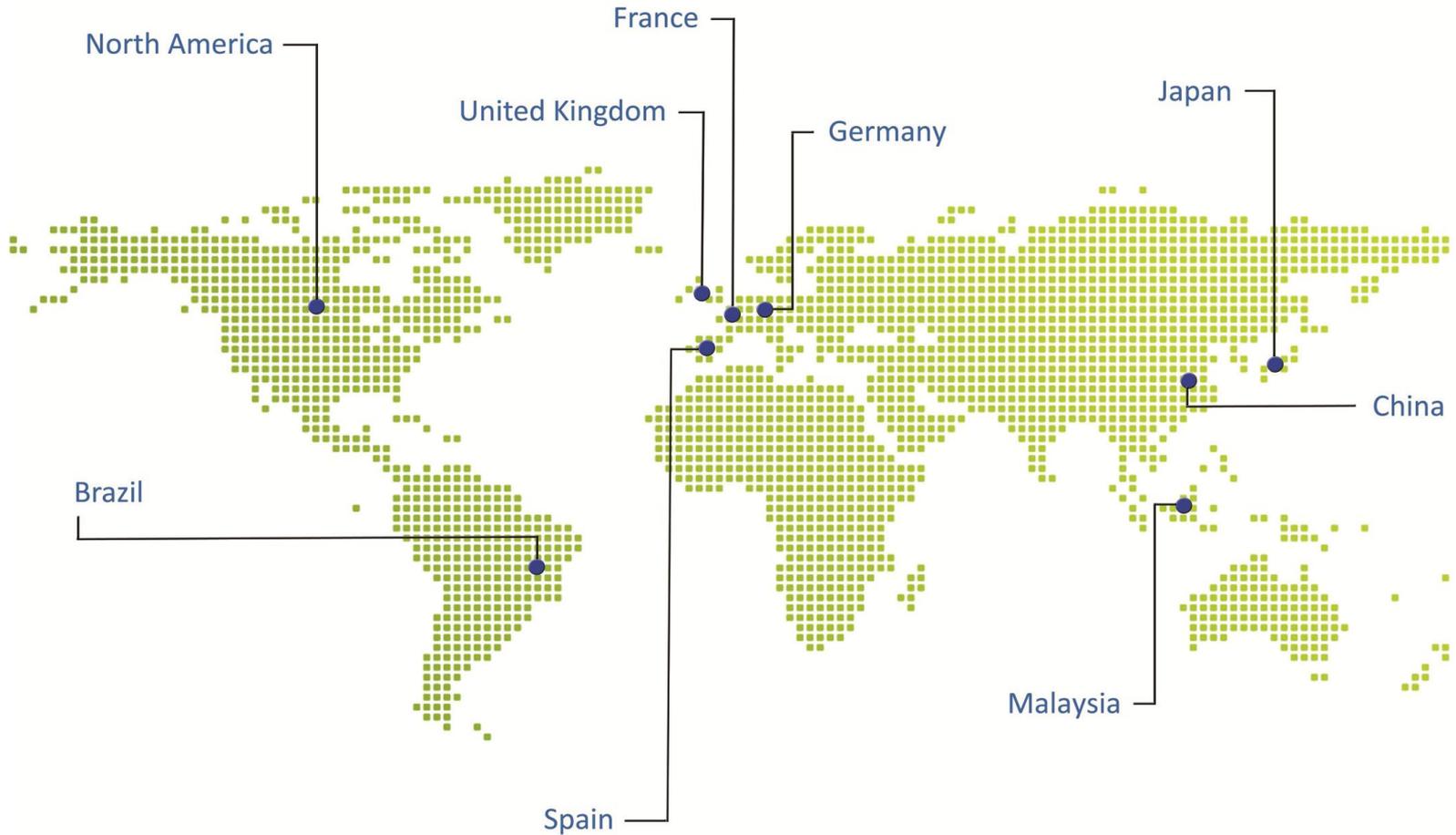
Hybrid Solutions - Road to Renewables

BSRIA Worldwide Market Intelligence



- Turnover £3.5 million for 2011
 - 50% multi-client
 - 50% private client including management consultancy
- Research across 94 countries
- 37 permanent multi-lingual analysts
- 35 independent consultants
- Offices in UK, China, US, France, Spain, Germany, Malaysia, Brazil and partners in other countries
- More offices this year
- Global network of associates eg. JARN

BSRIA WMI Offices



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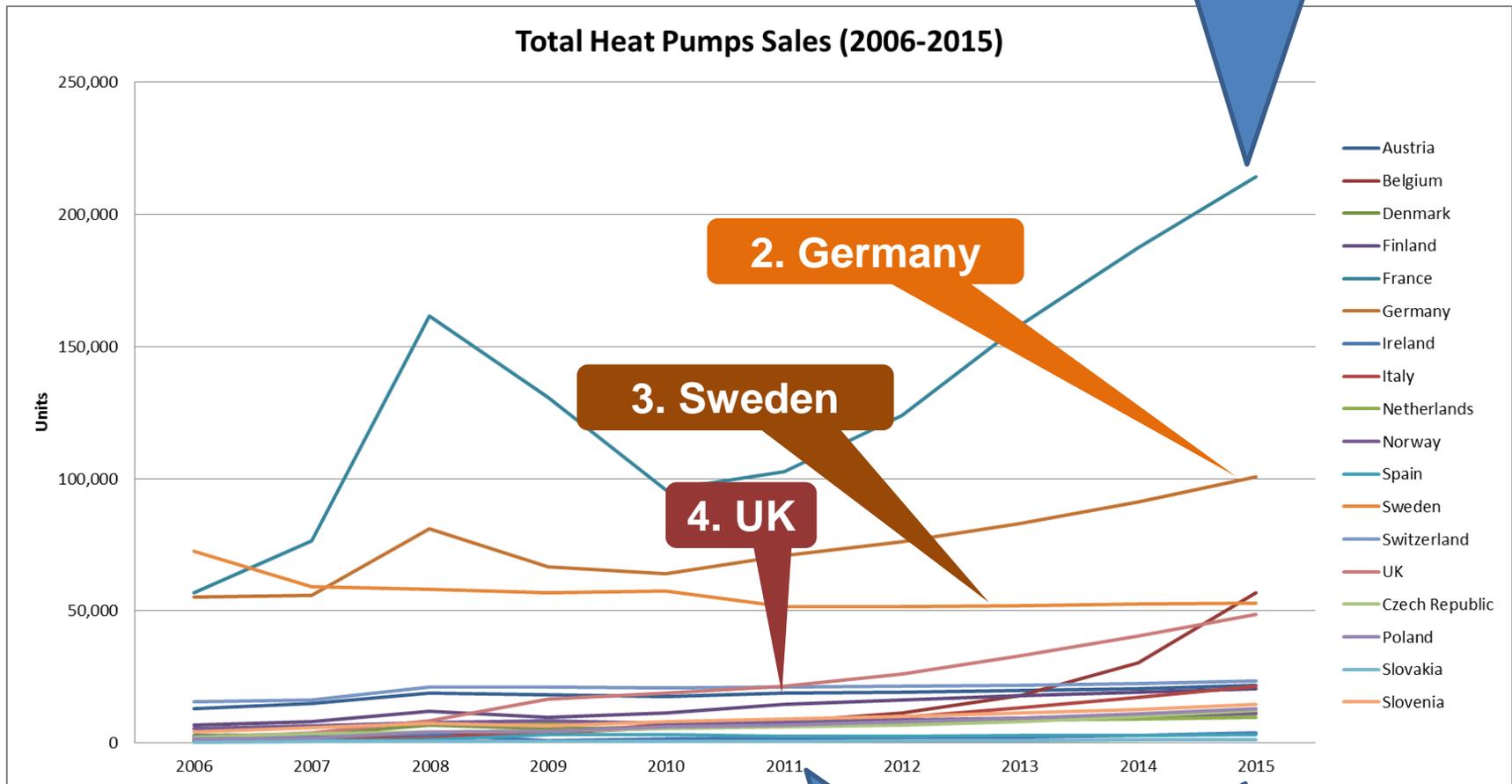
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Total Heat Pump Sales – Europe (2006-2015)



1. France

2. Germany

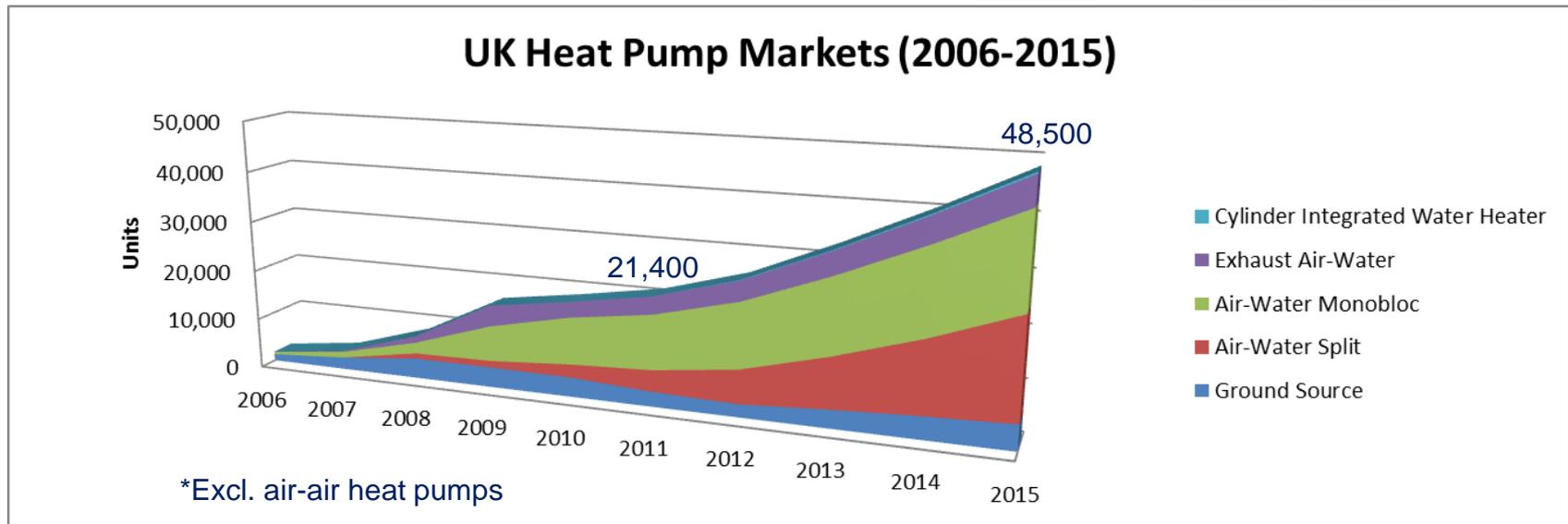
3. Sweden

4. UK

**2011 Total
c. 366,000**

**2015 Total
c. 640,000**

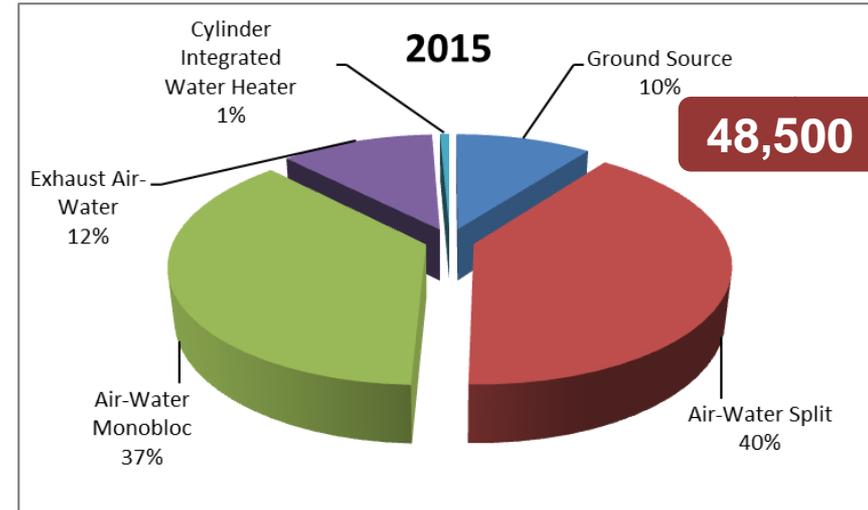
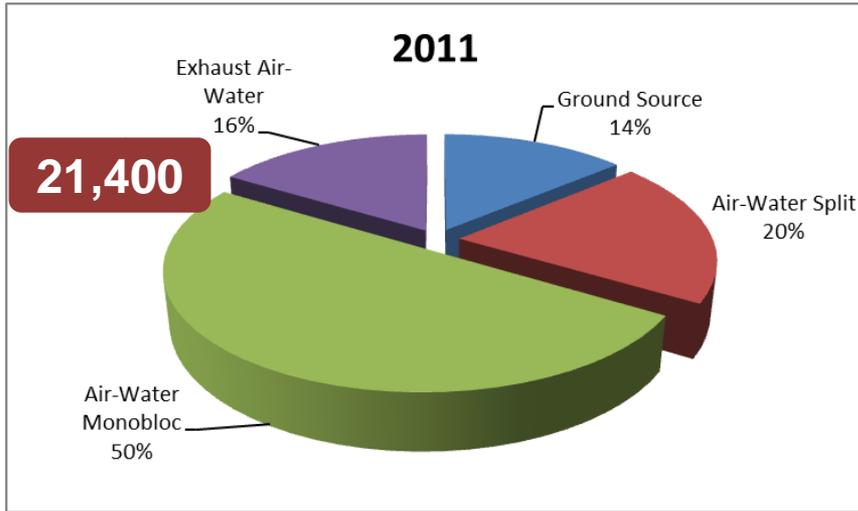
UK Heat Pump Market / Total Heat Pump Sales



- Overall CAGR (2011-2015): > +22%
- Ground-water CAGR (2011-2015): +2%
- Air-water monobloc CAGR (2011-2015): +7.6%
- Air-water split CAGR (2011-2015): +26.8%

NB: Forecast takes into account RHI being launched in 2013

UK Heat Pump Market / Total Heat Pump Sales (2011 vs. 2015)



Share in UK (2011 vs. 2015)

Air-Water Monobloc

Ground Source

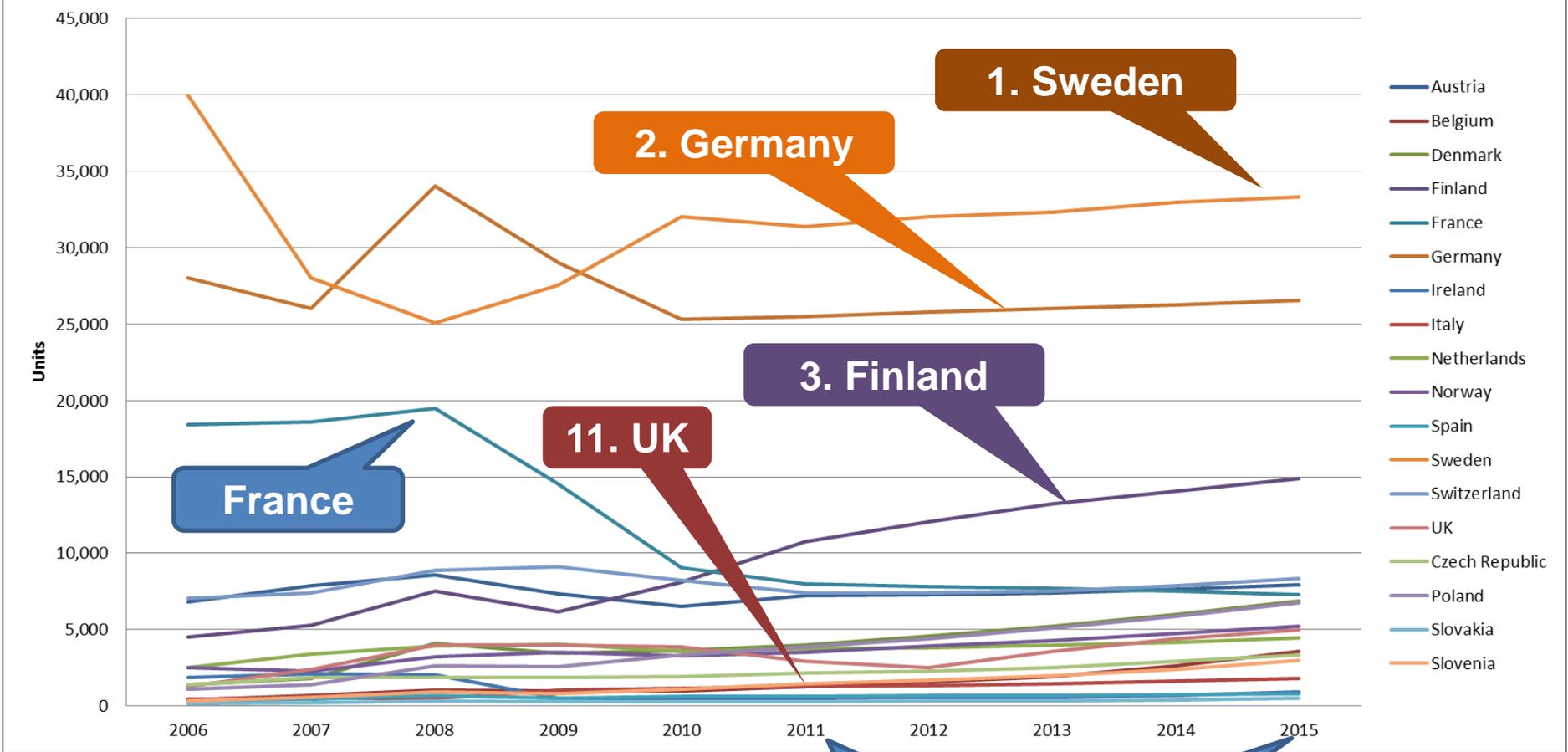
Exhaust Air-Water

Air-Water Split

Cylinder Integrated

Ground Source Heat Pump Sales – Europe (2006-2015)

Ground Source Heat Pumps Sales (2006-2015)



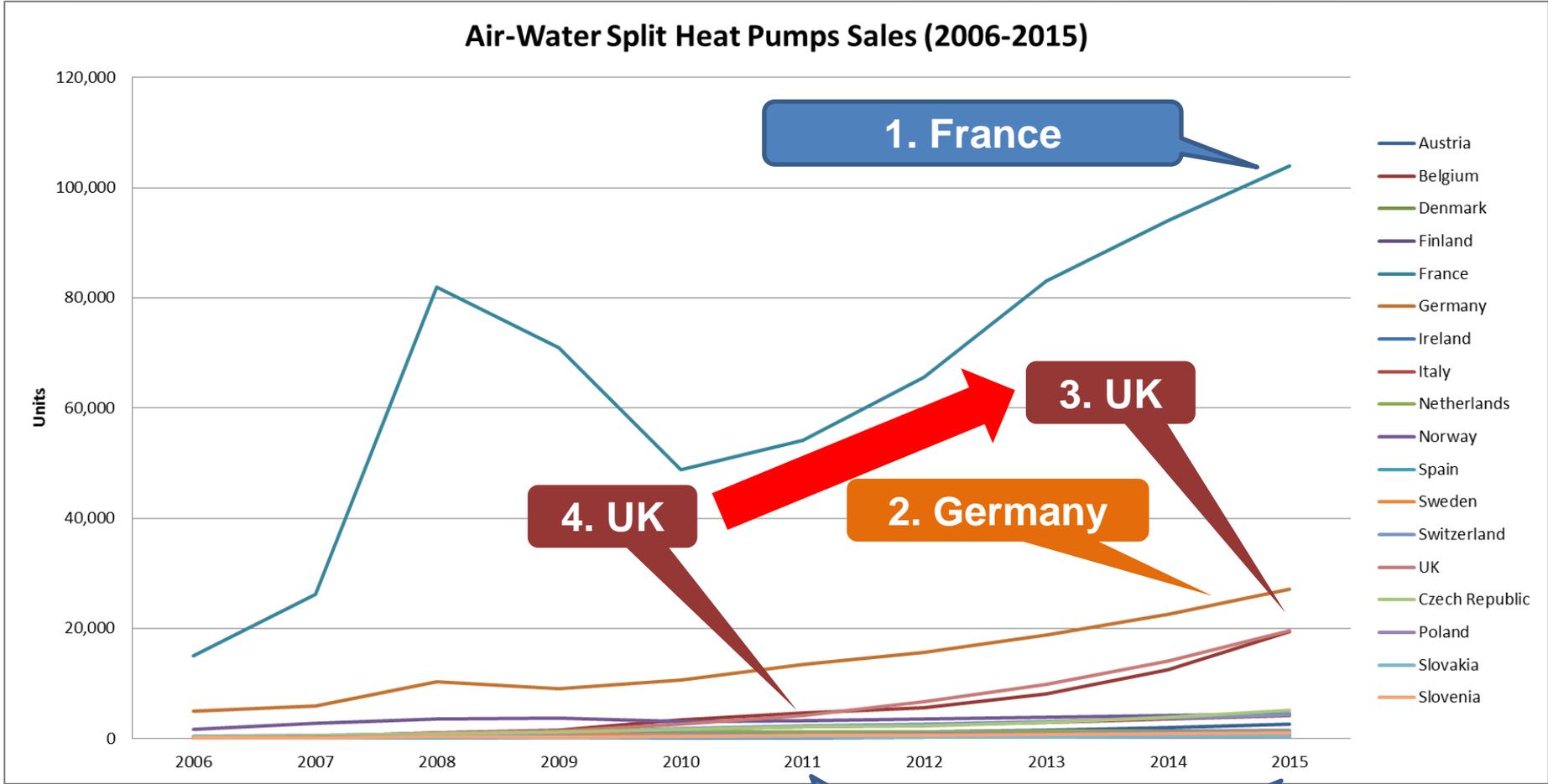
Excellence in Market Intelligence

2011 Total
c. 116,000

2015 Total
c. 140,000



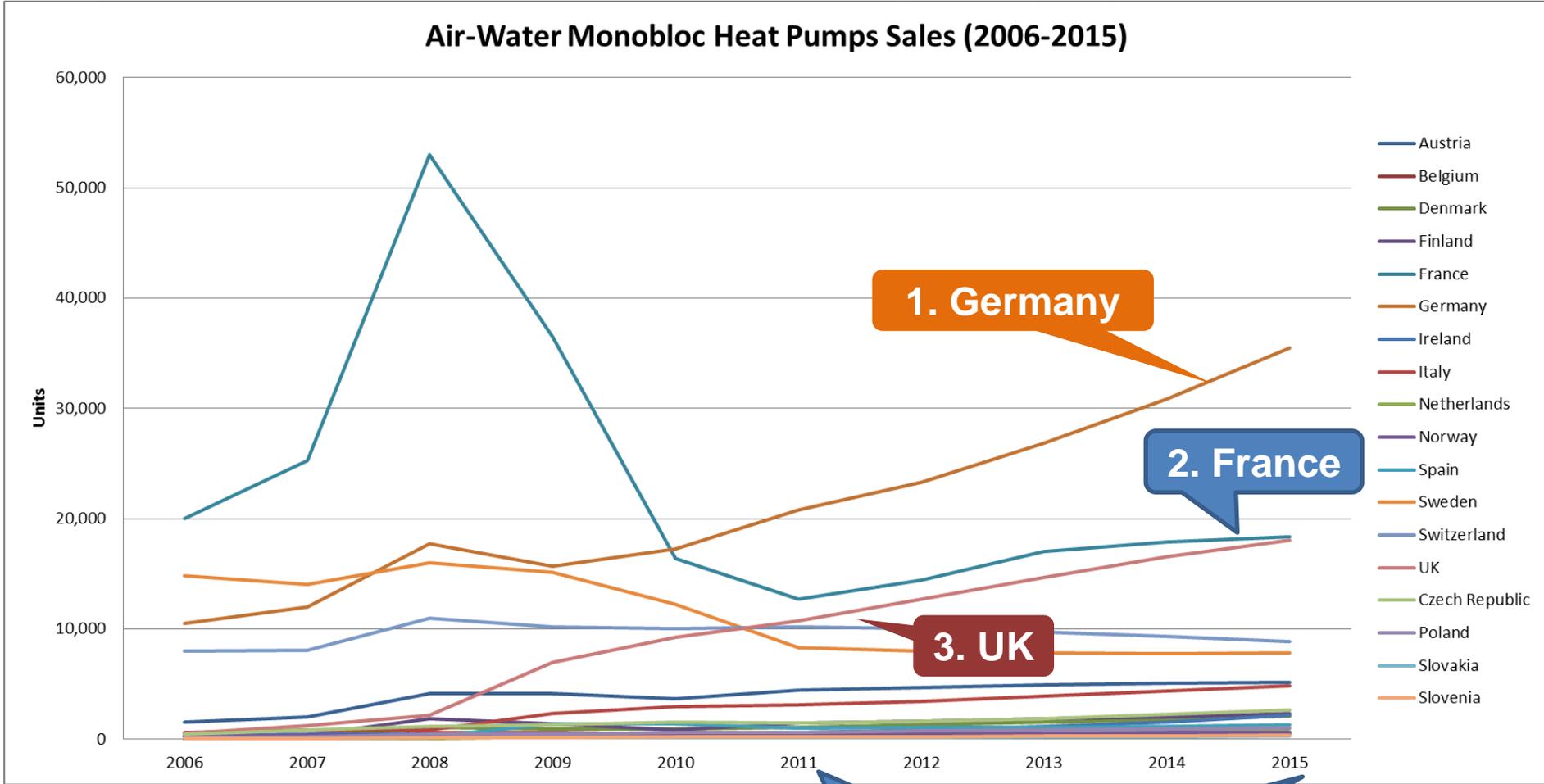
Air-Water Split Heat Pump Sales – Europe (2006-2015)



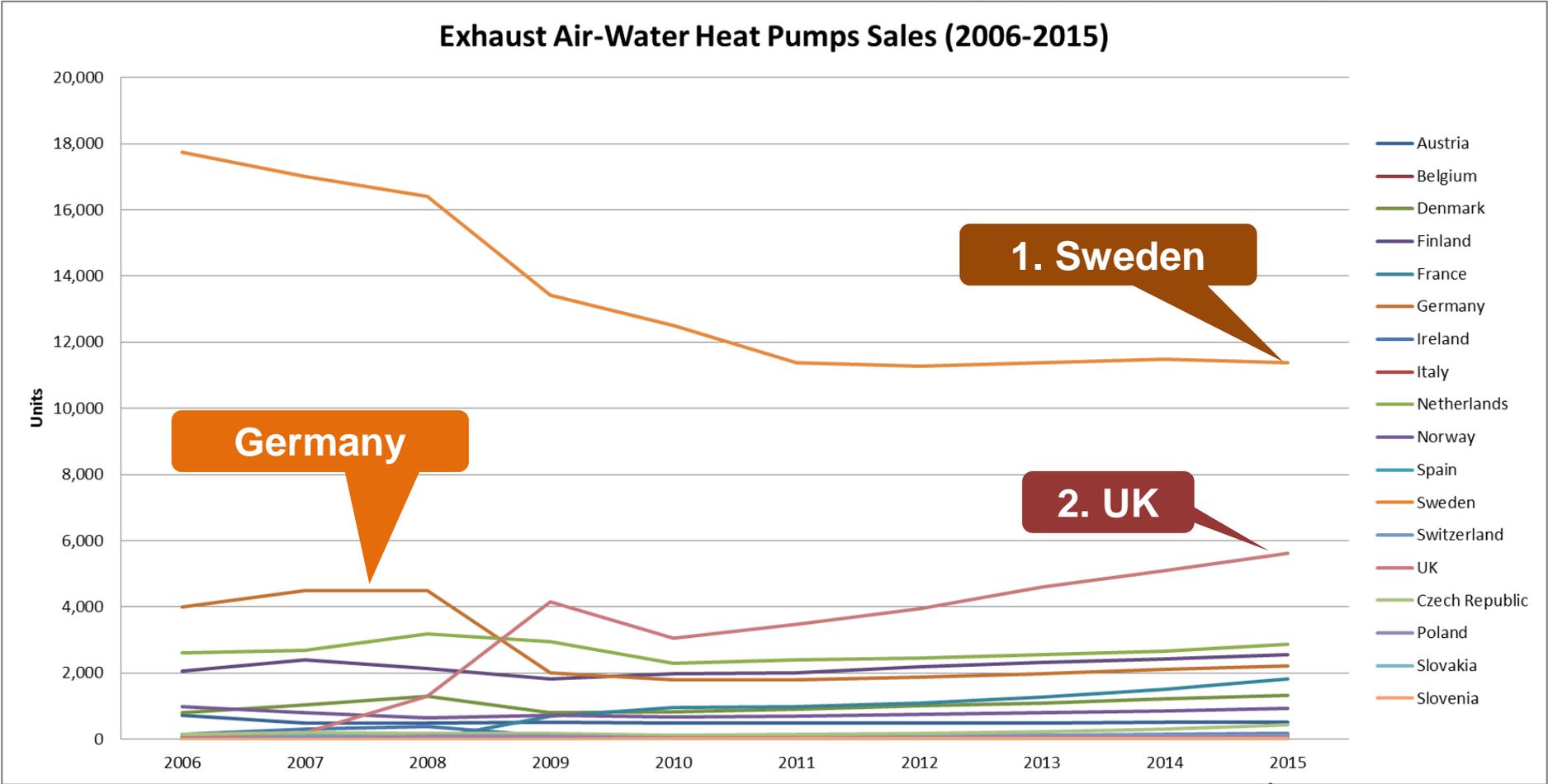
**2011 Total
c. 92,000**

**2015 Total
c. 198,000**

Air-Water Monobloc Heat Pump Sales – Europe (2006-2015)



Exhaust Air-Water Heat Pump Sales – Europe (2006-2015)



Excellence in Market Intelligence

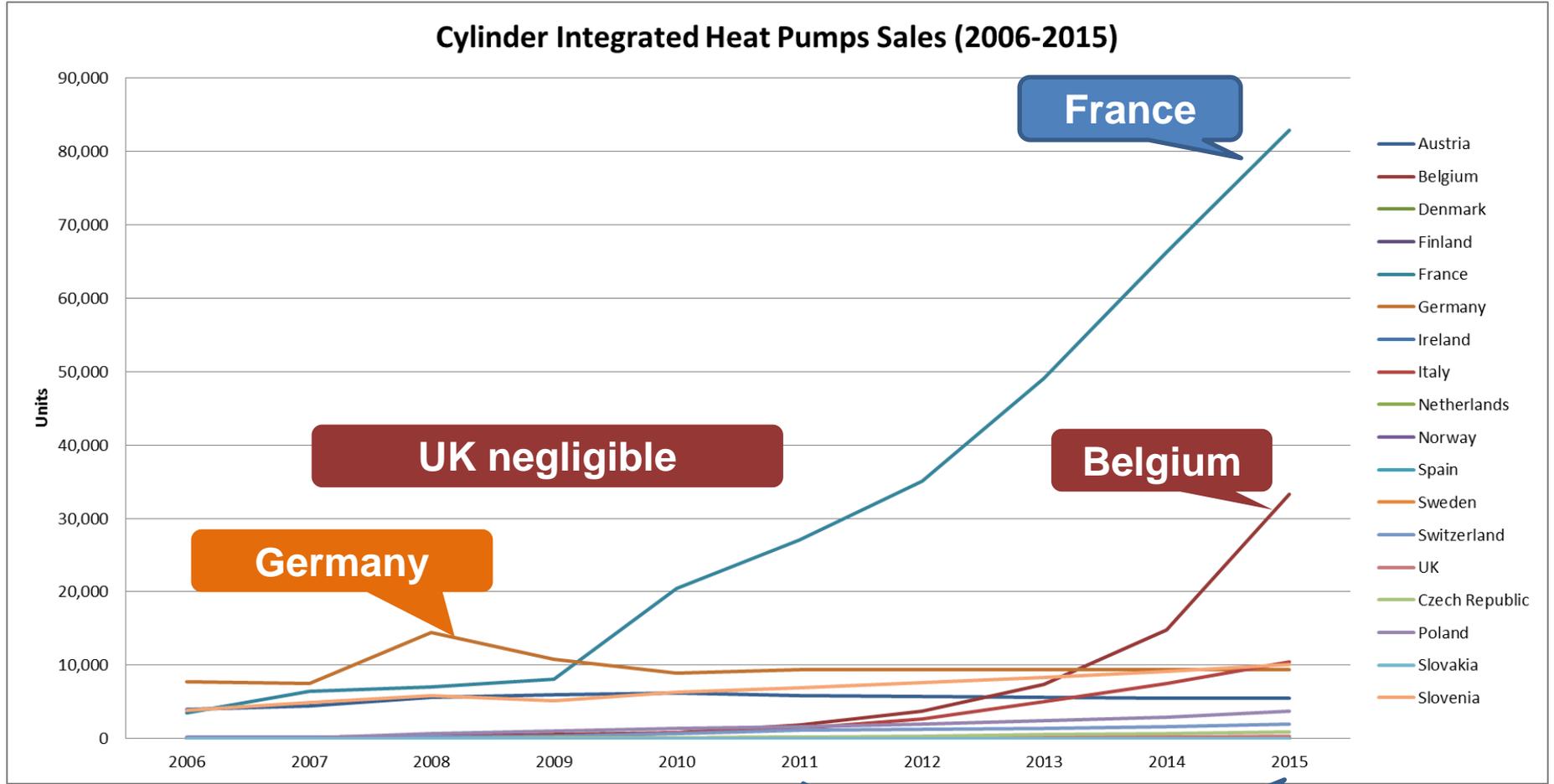
**2011 Total
c. 25,000**

**2015 Total
c. 30,000**



Cylinder Integrated Heat Pump Sales – Europe (2006-2015)

Cylinder Integrated Heat Pumps Sales (2006-2015)



Germany

UK negligible

France

Belgium

2011 Total
c. 56,000

2015 Total
c. 159,000

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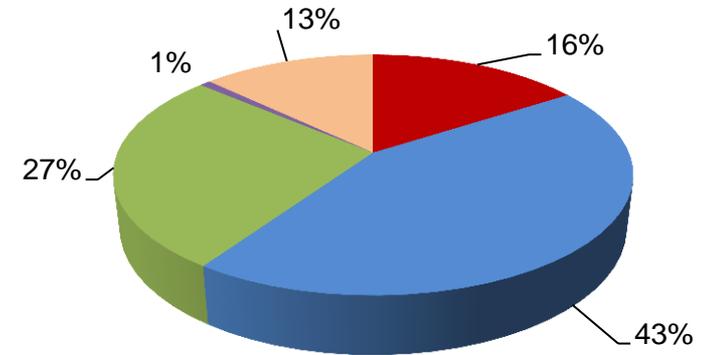
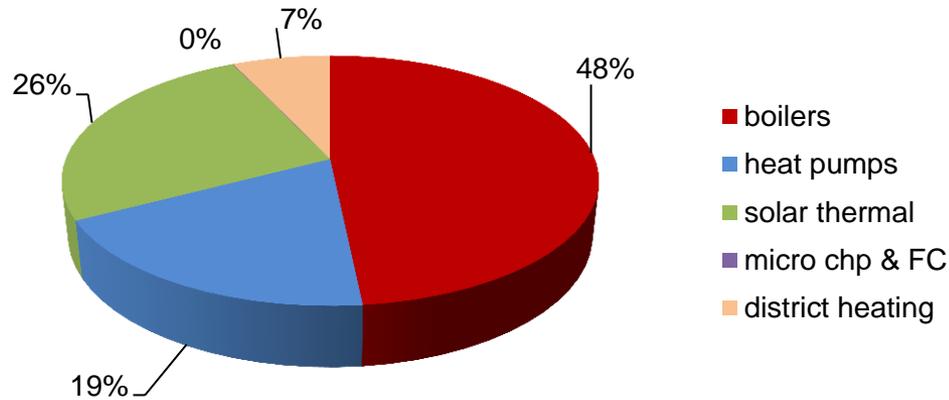
Hybrid Solutions - Road to Renewables

German Heating Technologies

2010

Sales to new build

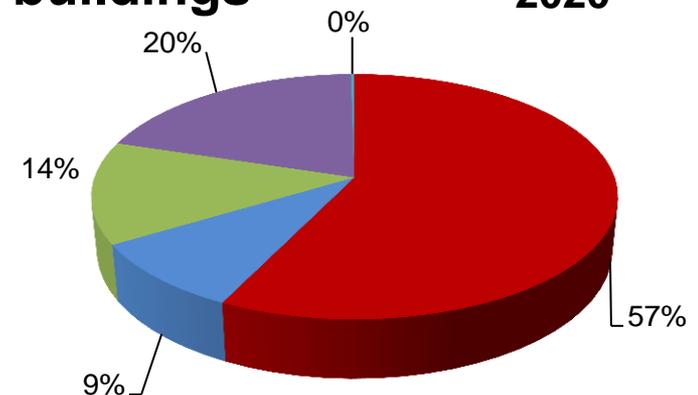
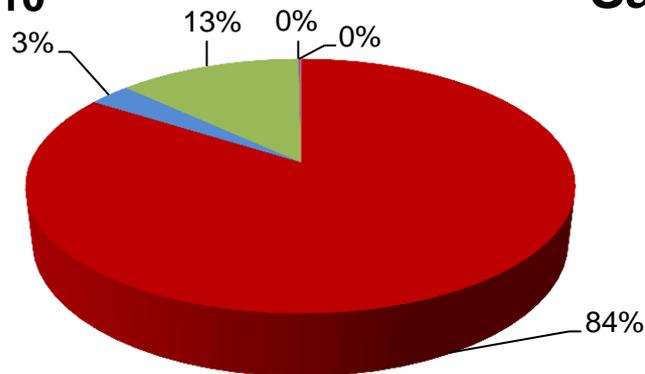
2020



2010

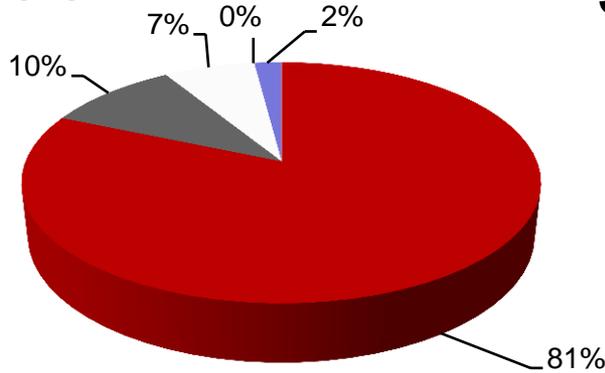
Sales to existing buildings

2020



UK Heating Technologies

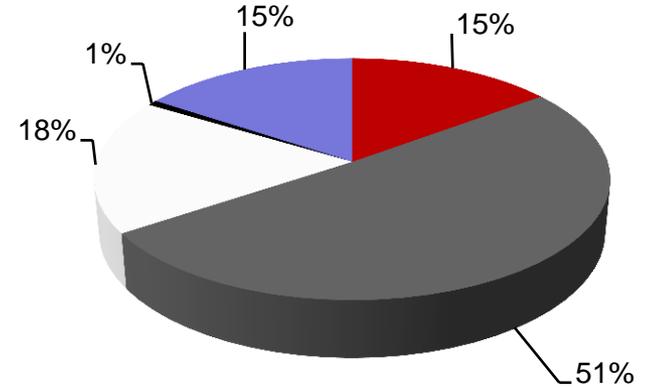
2010



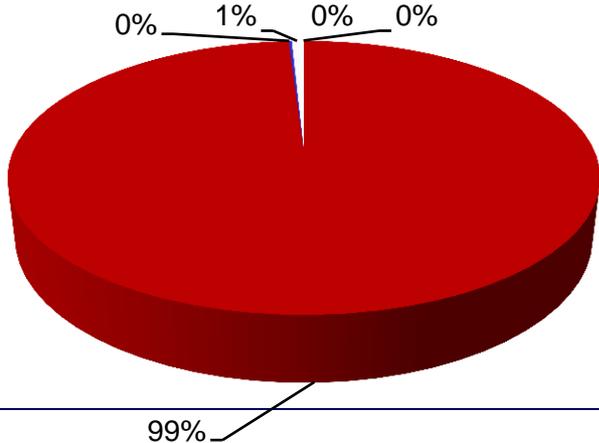
Sales to new build

- boilers
- heat pumps
- solar thermals
- micro chp & FC
- district heating

2020

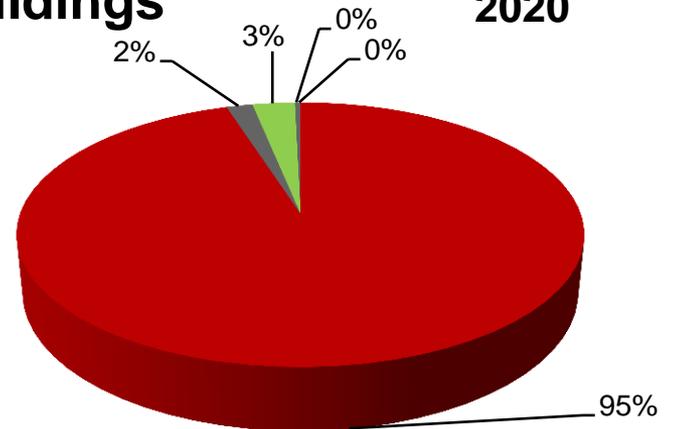


2010



Sales to existing buildings

2020



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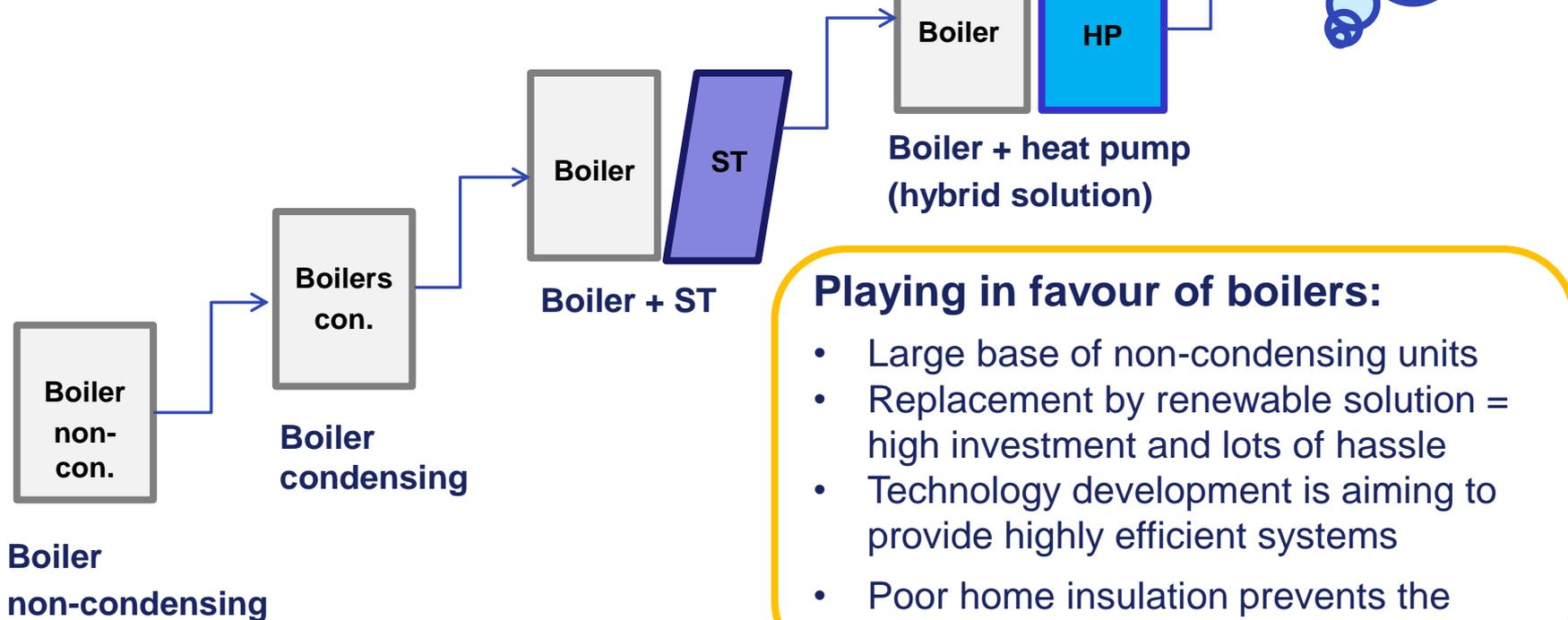
 Hybrid Solutions - Road to Renewables

Existing Dwellings / Road to Renewables

Existing boiler customers are moving slowly

Problems with boilers:

- Growing gas/oil prices
- Low efficiency of many existing units



Playing in favour of boilers:

- Large base of non-condensing units
- Replacement by renewable solution = high investment and lots of hassle
- Technology development is aiming to provide highly efficient systems
- Poor home insulation prevents the deployment of full HP saving potential.

Hybrid solutions Talk of the day?

Hybrid solutions

Heat pump + condensing boiler



- More expensive than boilers & currently not included in incentive programs

New build

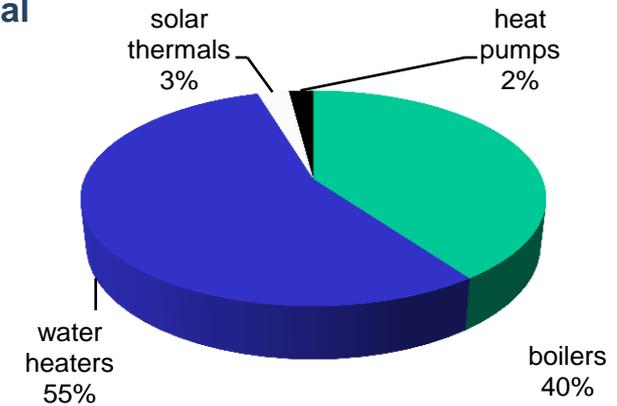
- Help achieving current building requirements in some countries.



Existing buildings

Sales of space & water heating products in Europe, 2011.

- Large potential available



Analysis is based on data from following European countries: Austria, Belgium, France, Germany, Italy, Netherlands, Spain, Switzerland.



Thank you for your attention!

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