EUROPEAN HEAT PUMP SUMMIT

POWERED BY CHILLVENTA

SYMPOSIUM + EXPO
NUREMBERG, 20–21.10.2015

Industrial | Commercial | Residential
Heating & Cooling | Components & Equipment

hp-summit.de

NÜRNBERG MESSE

European heat pump markets

Thomas Nowak
Secretary General EHPA

Contakt
thomas.nowak@ehpa.org
+49 176 6320 1140

European Heat Pump Association (EHPA)

Vision:
Heat pumps as a core technology for heating, cooling, hot wat
in Europe

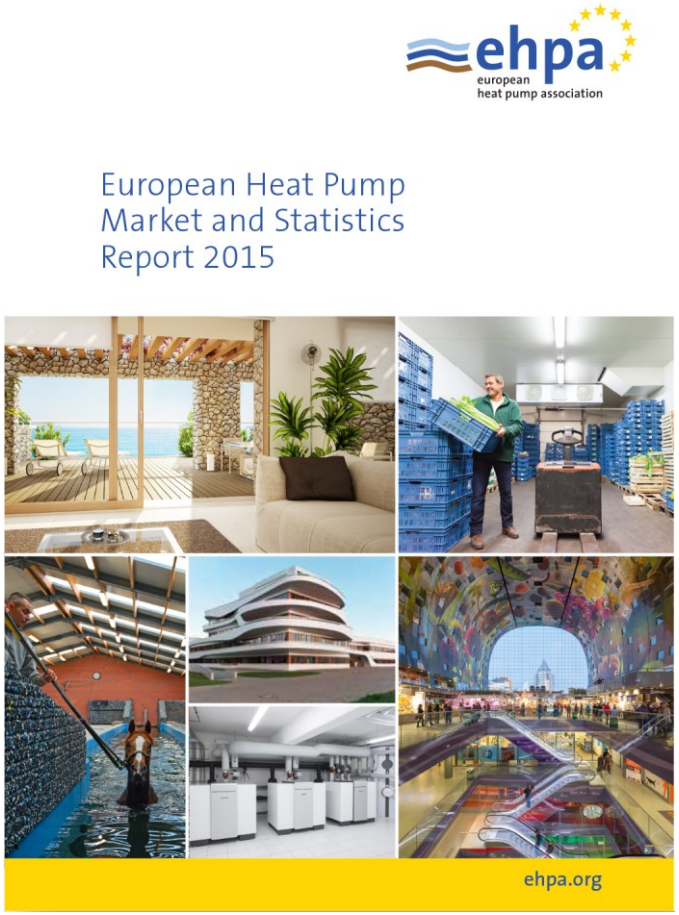
- Foundet in 2000
- 111 members in July 2015
- 22 countries
- **“We speak heat pumps in Brussels”**
  - **Advocacy**
  - **Networking**
  - **Quality**
  - **Annual conference (19./20.5.2016 | Paris)**
  - **Data collection and market studies**
  - **Projects and project facilitation**

Future cities can be heat pump cities

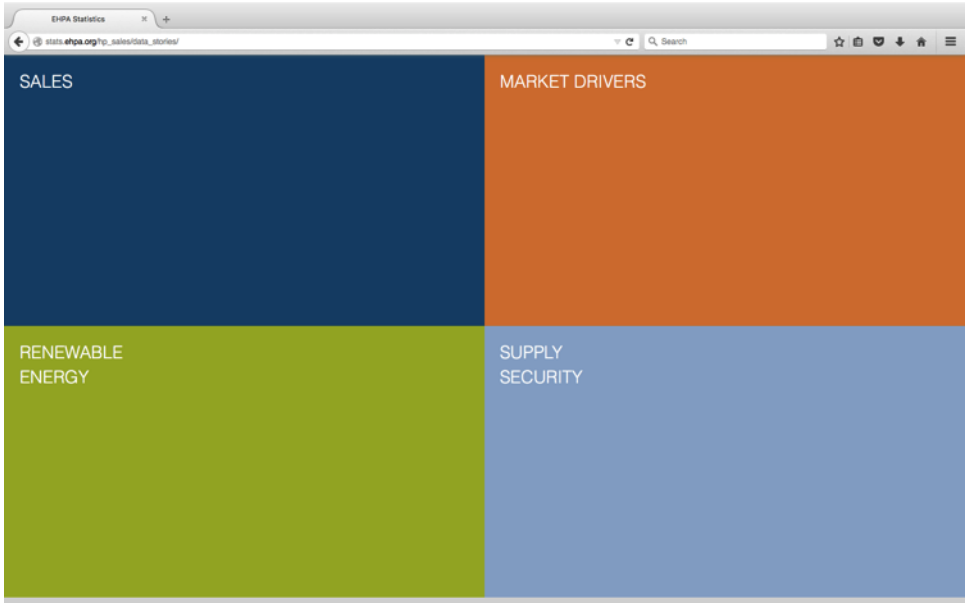
EUROPEAN HEAT PUMP SUMMIT

European Heat Pump Market and Statistics report 2015 version available now

EUROPEAN HEAT PUMP SUMMIT



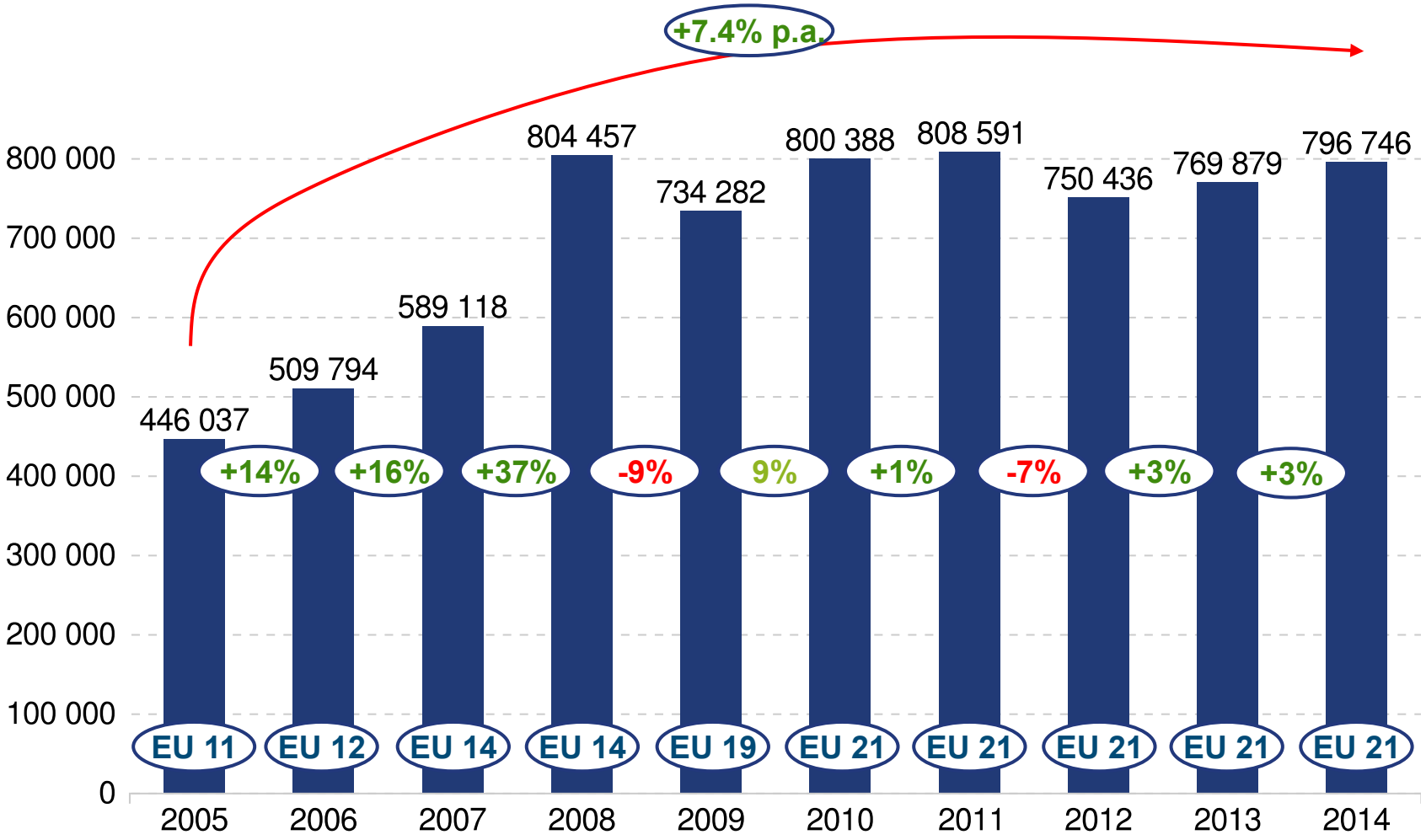
+



http://www.ehpa.org/market-data/2014/

market development 2005 – 2014 accumulated: 7.5 million units installed

EUROPEAN HEAT PUMP SUMMIT

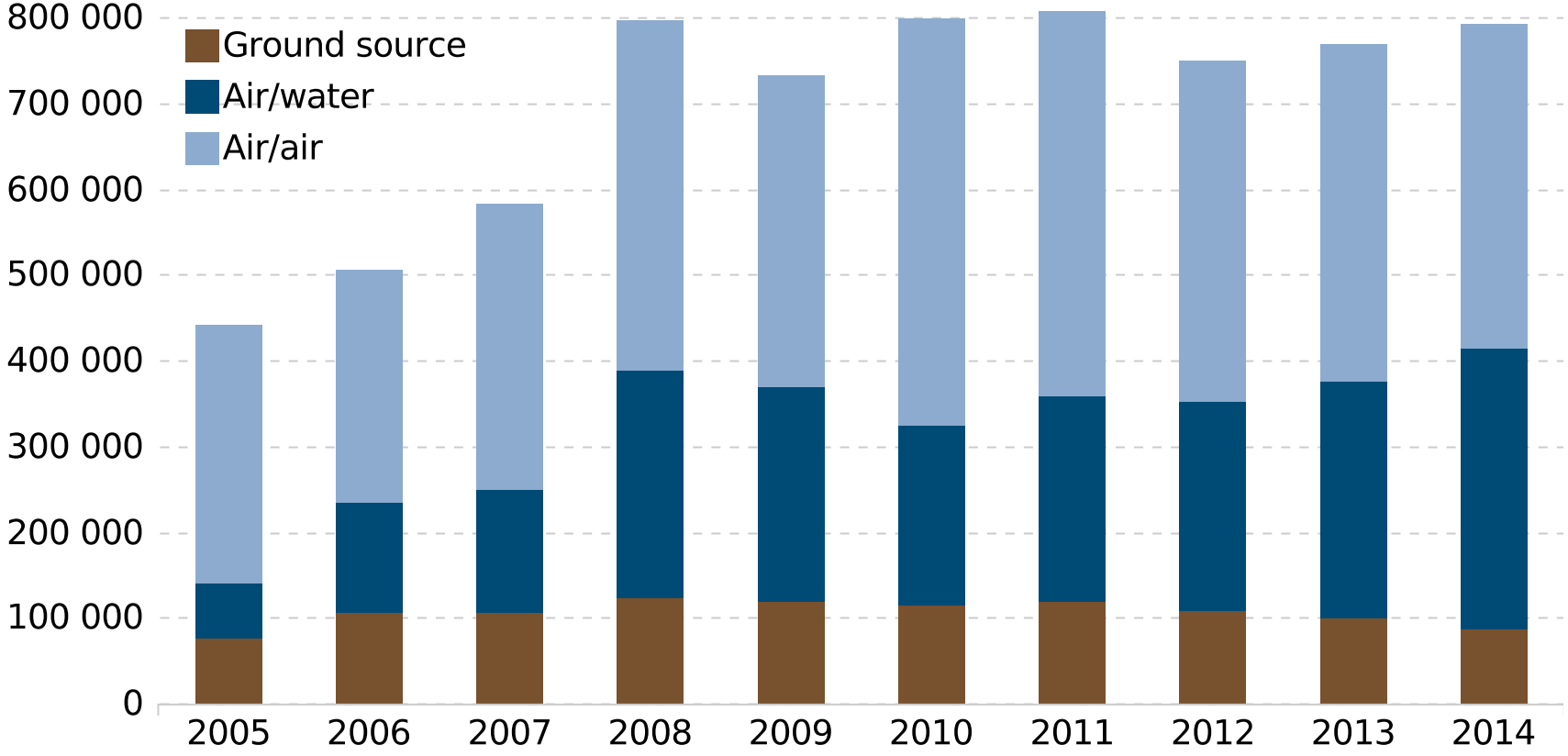


market growth rates 2006 - 2014

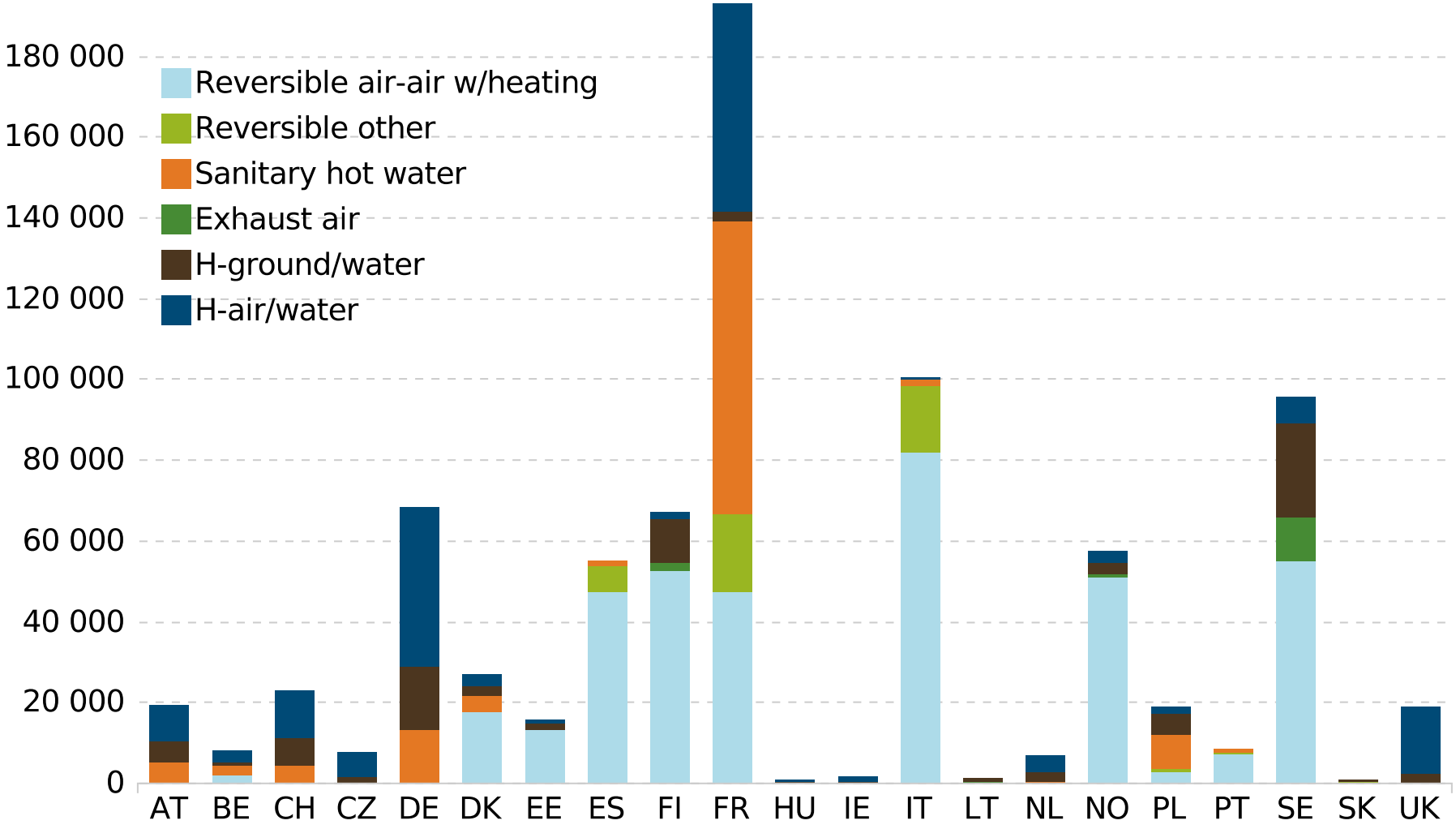
EUROPEAN HEAT PUMP SUMMIT

	2006	2007	2008	2009	2010	2011	2012	2013	2014
UK	149.3%	103.2%	125.3%	92.2%	13.9%	-1.3%	-3.4%	-1.3%	6.1%
SK					54.7%	-38.4%	33%	22.3%	14.8%
SE	20.9%	-23.5%	42.3%	-12.4%	9.1%	-16.3%	-10.9%	1.5%	-1%
PT	8.5%	50.8%	-6.6%	62.1%	57.5%	-23%	-38.9%	16.3%	-12.7%
PL						29%	18.1%	19.8%	24.6%
NO	38.7%	26.7%	20.5%	-0.8%	11.7%	-11.1%	-19.3%	-7.2%	-8.1%
NL		-6.7%	46.7%	20.3%	-3.8%	9.8%	-3.4%	-15.3%	-8.1%
LT					-6.7%	15.5%	8%	11.6%	52.1%
IT	-36.8%	34.1%	2.7%	-22.3%	12.9%	0.3%	-7.4%	-0.6%	-12.1%
IE					42.8%	-14.5%	13.1%	9.1%	53.5%
HU					18.1%	-9.4%	-18.8%	14%	0%
FR	71.2%	28.7%	70.8%	-11.8%	-31.2%	18.1%	1.9%	8.1%	27.1%
FI	25.5%	19%	43.8%	-15.1%	-4%	11.1%	-15.6%	0.4%	9.7%
ES						5.7%	-32.3%	4.4%	4.7%
EE			52.2%	-11.3%	2.5%	12.8%	14.3%	8.6%	8.2%
DK			78.9%	59.7%	-3.8%	6.4%	23.4%	2.9%	-14.2%
DE	102.2%	1.7%	54.6%	-16.9%	-6.1%	5%	6.7%	2.6%	-5.1%
CZ	48.7%	32.1%	-3.5%	40.3%	78%	0.2%	3.2%	13%	3.7%
CH	33.1%	5.8%	26.8%	-0.9%	-1.7%	-2.1%	6.3%	5.2%	0.8%
BE					101%	73.2%	22.4%	1.6%	-15.1%
AT	39.3%	12.1%	23.5%	-3%	-6.5%	-1.6%	4.8%	5.6%	4.9%

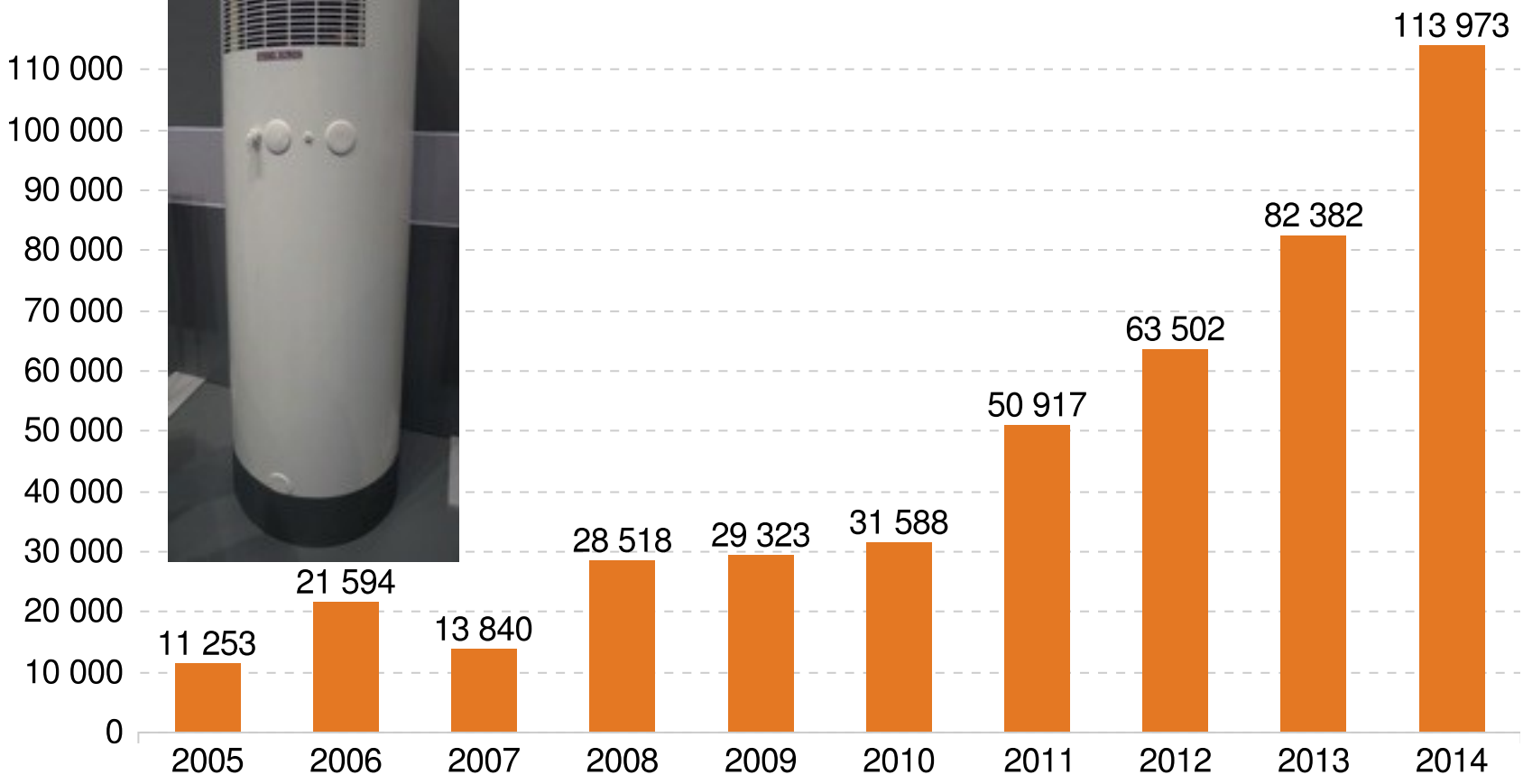
Air dominant energy source for HP in Europe
Annual sales by energy source



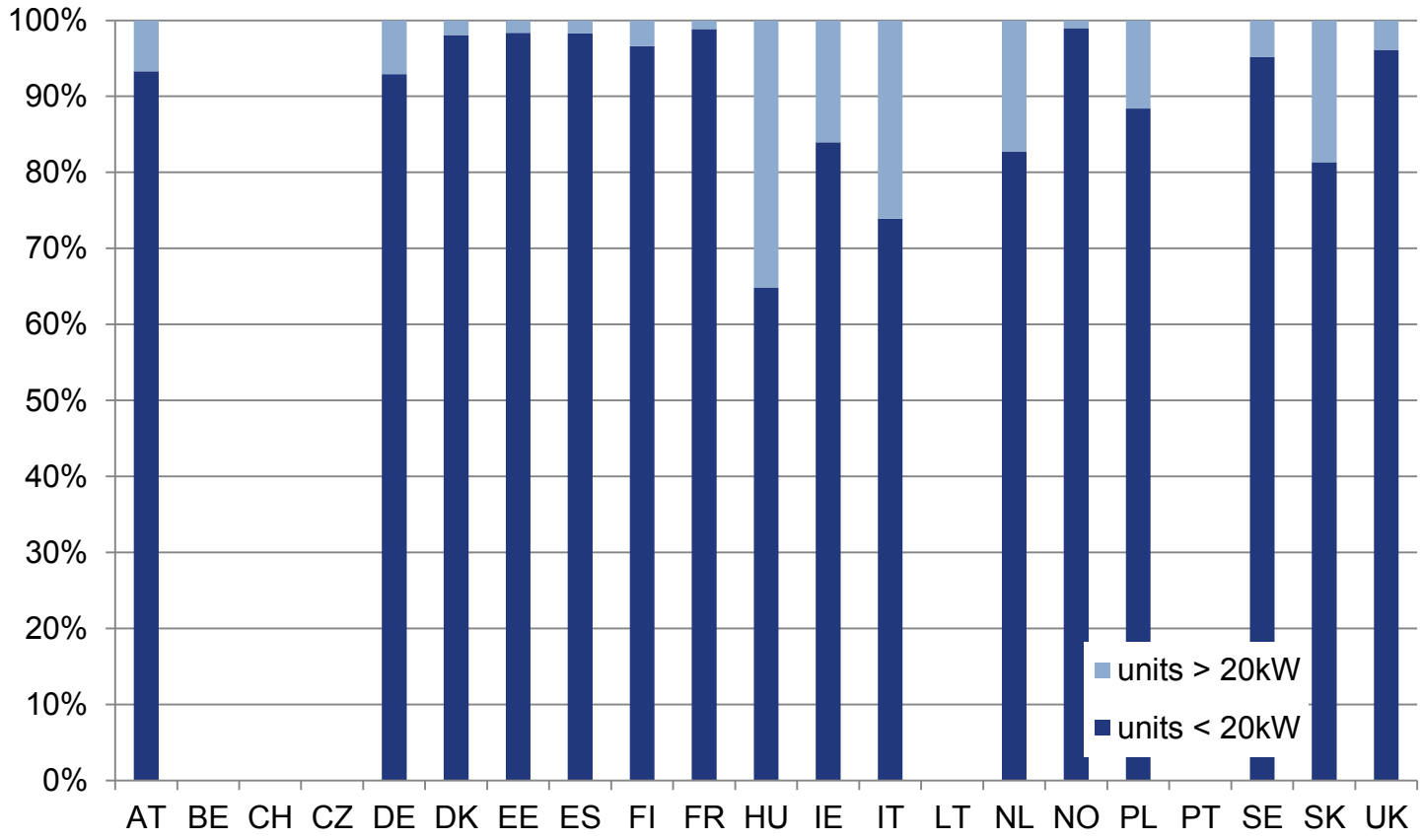
Split picture of preferred HP across Europe
Sales 2014 by country



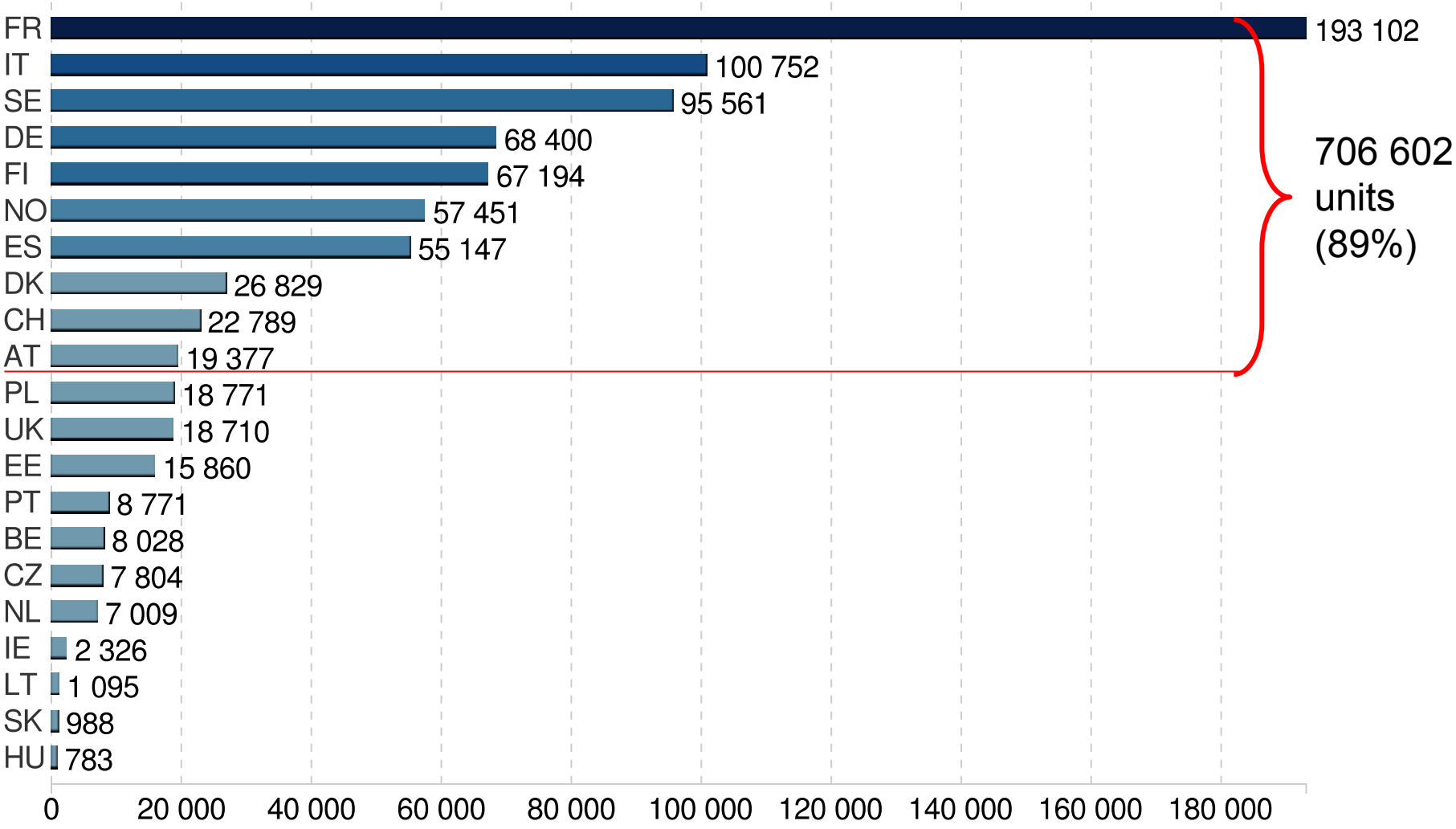
Biggest growth in sanitary hot water HP



Large heat pumps – hidden champions?
Split of sales in 2014 by capacity

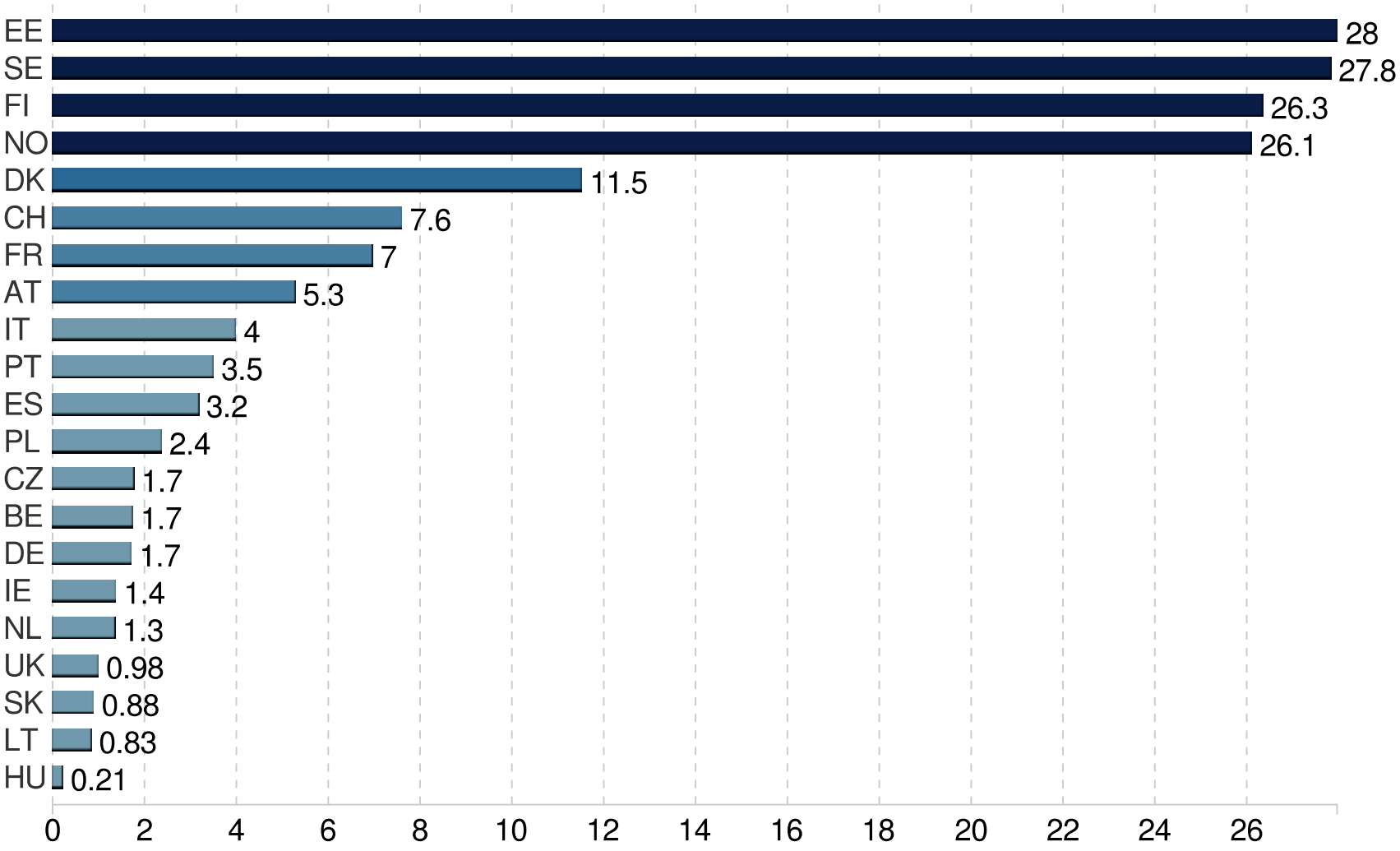


France leads EU heat pump markets again in 2014



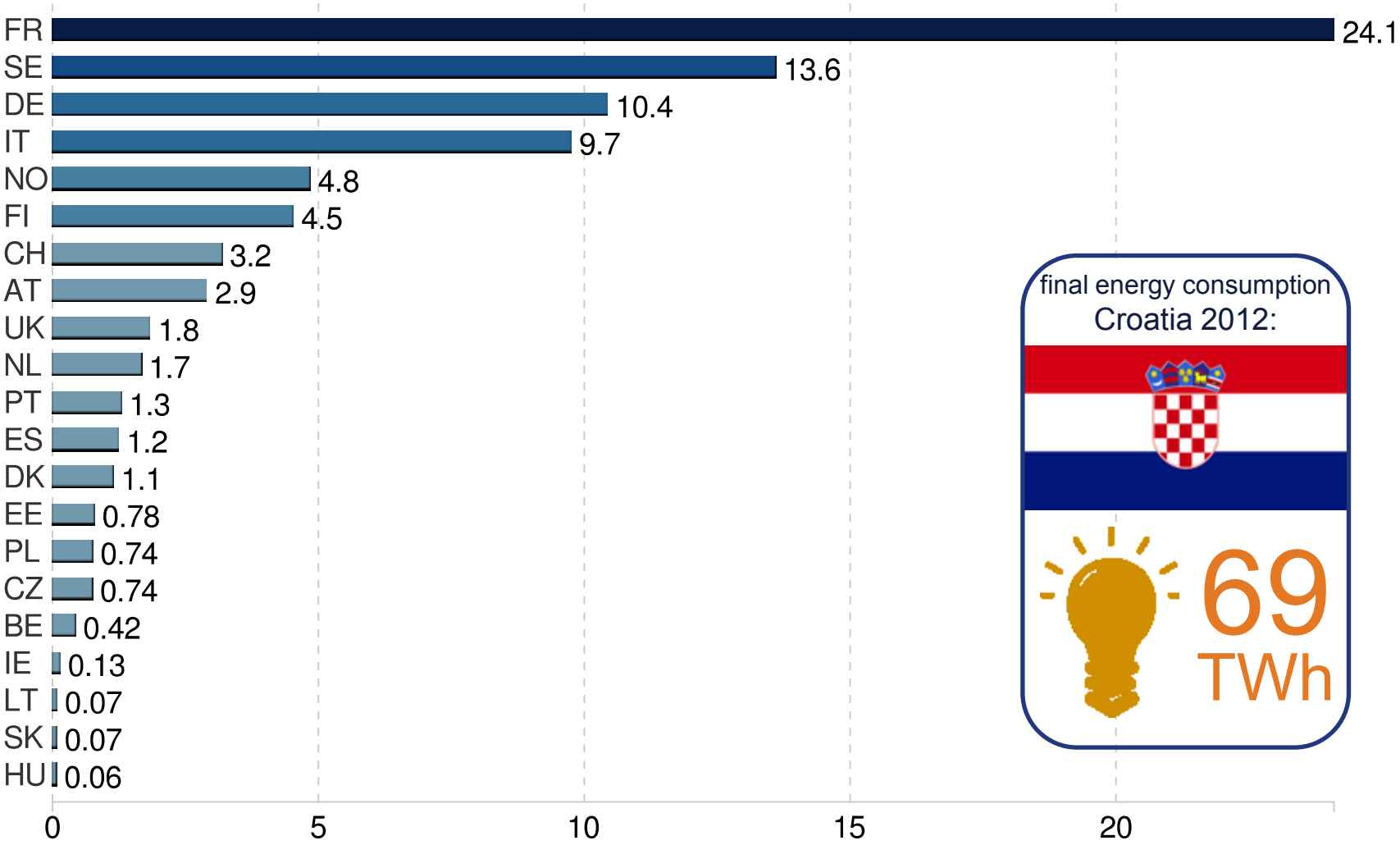
Scandinavia + Baltics lead HP penetration sales per 1000 households

EUROPEAN HEAT PUMP SUMMIT



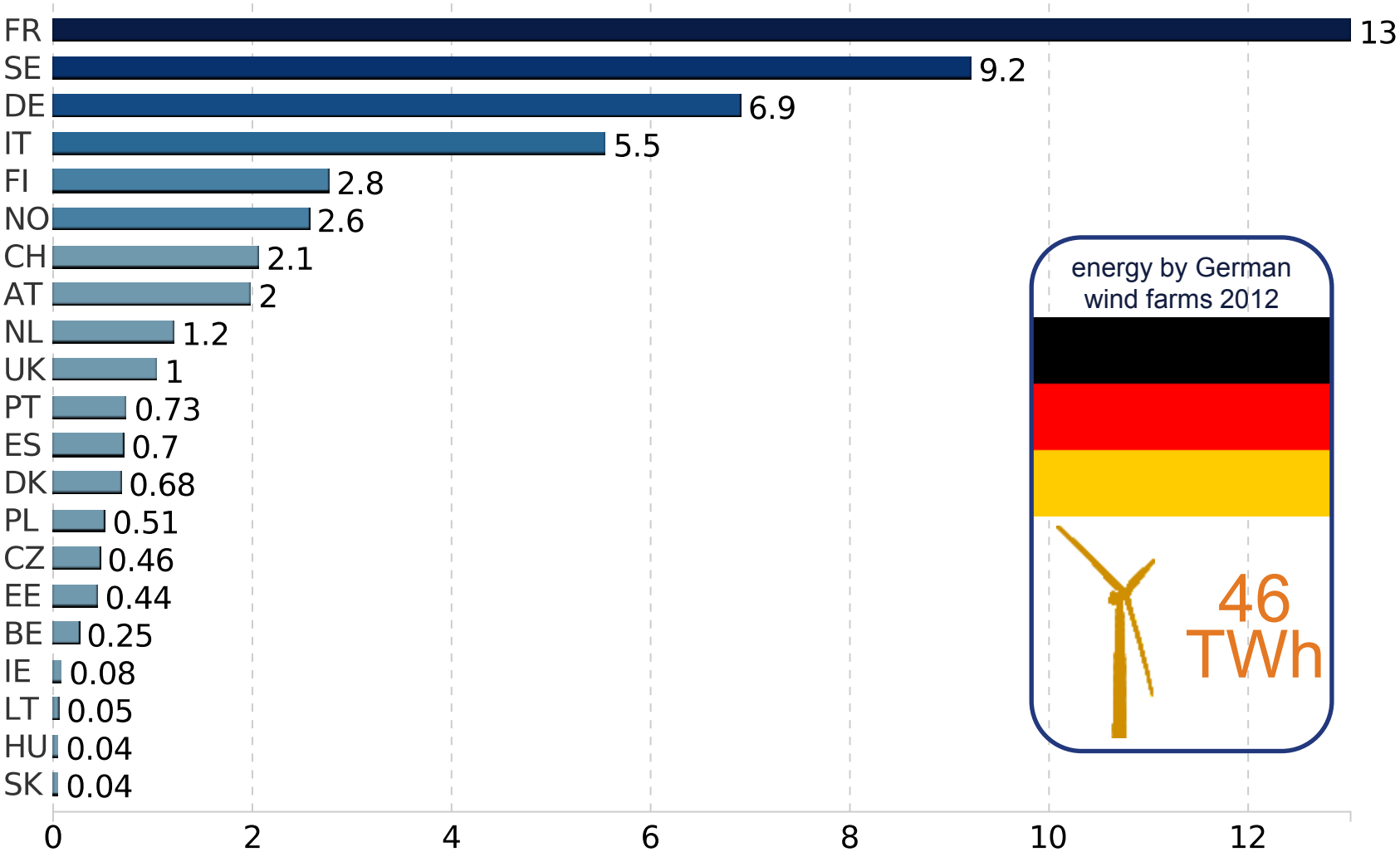
85.8 TWh renewable energy provided in 2014
2.7% of the 2030 target

EUROPEAN HEAT PUMP SUMMIT



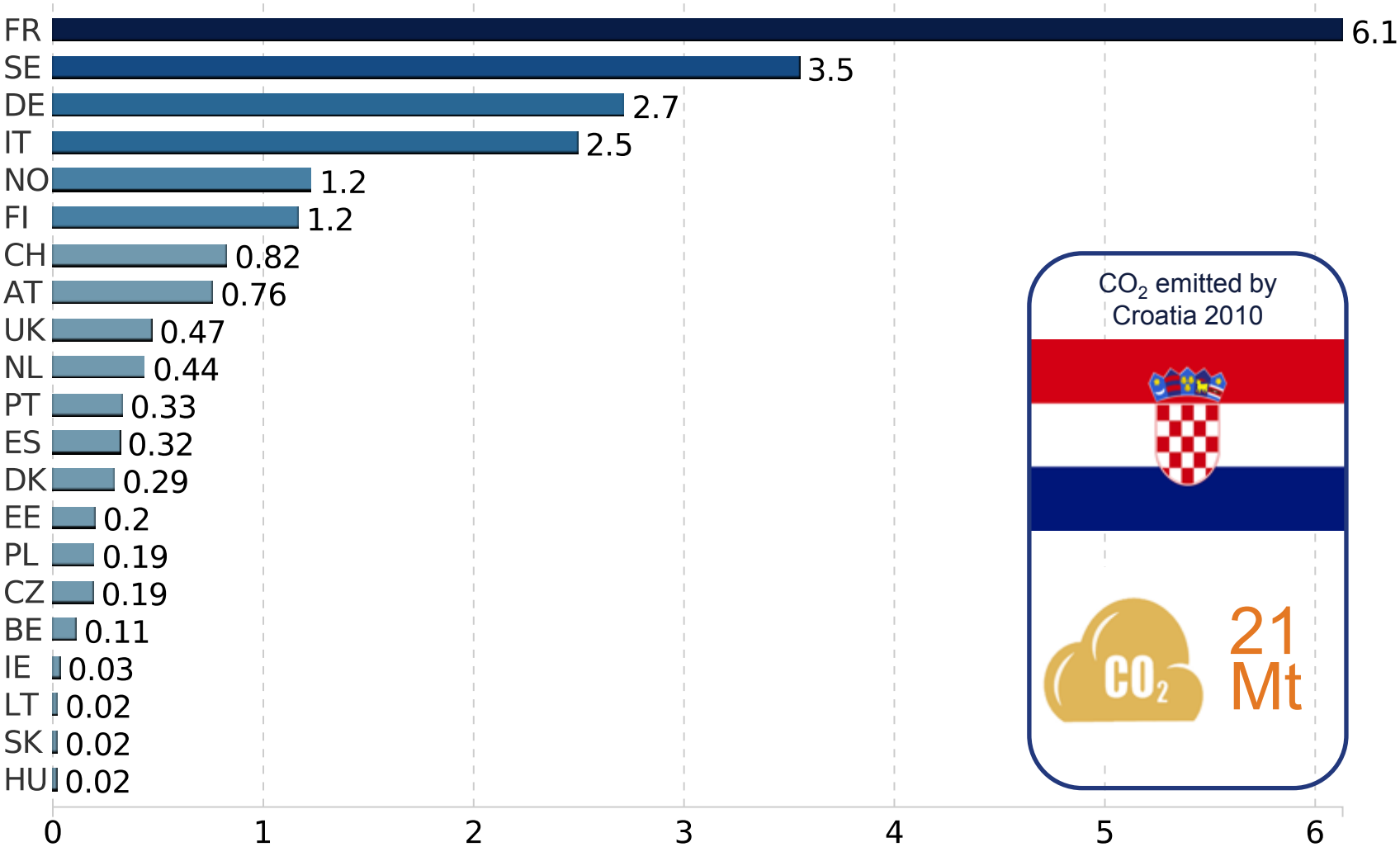
51.7 TWh primary energy savings in 2014
0.2% of the 2030 target

EUROPEAN HEAT PUMP SUMMIT



22.1 Mt of GHG emission reduction
1.2% of the 2030 target

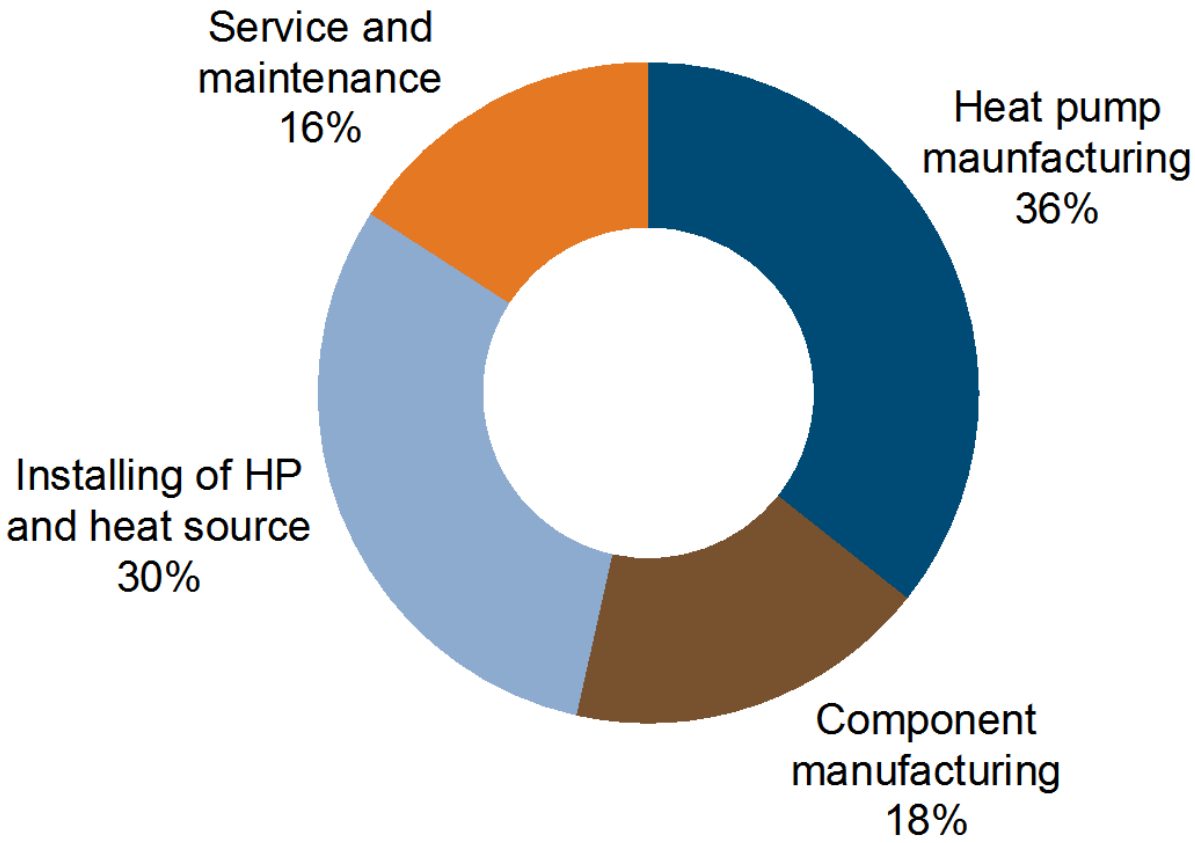
EUROPEAN HEAT PUMP SUMMIT



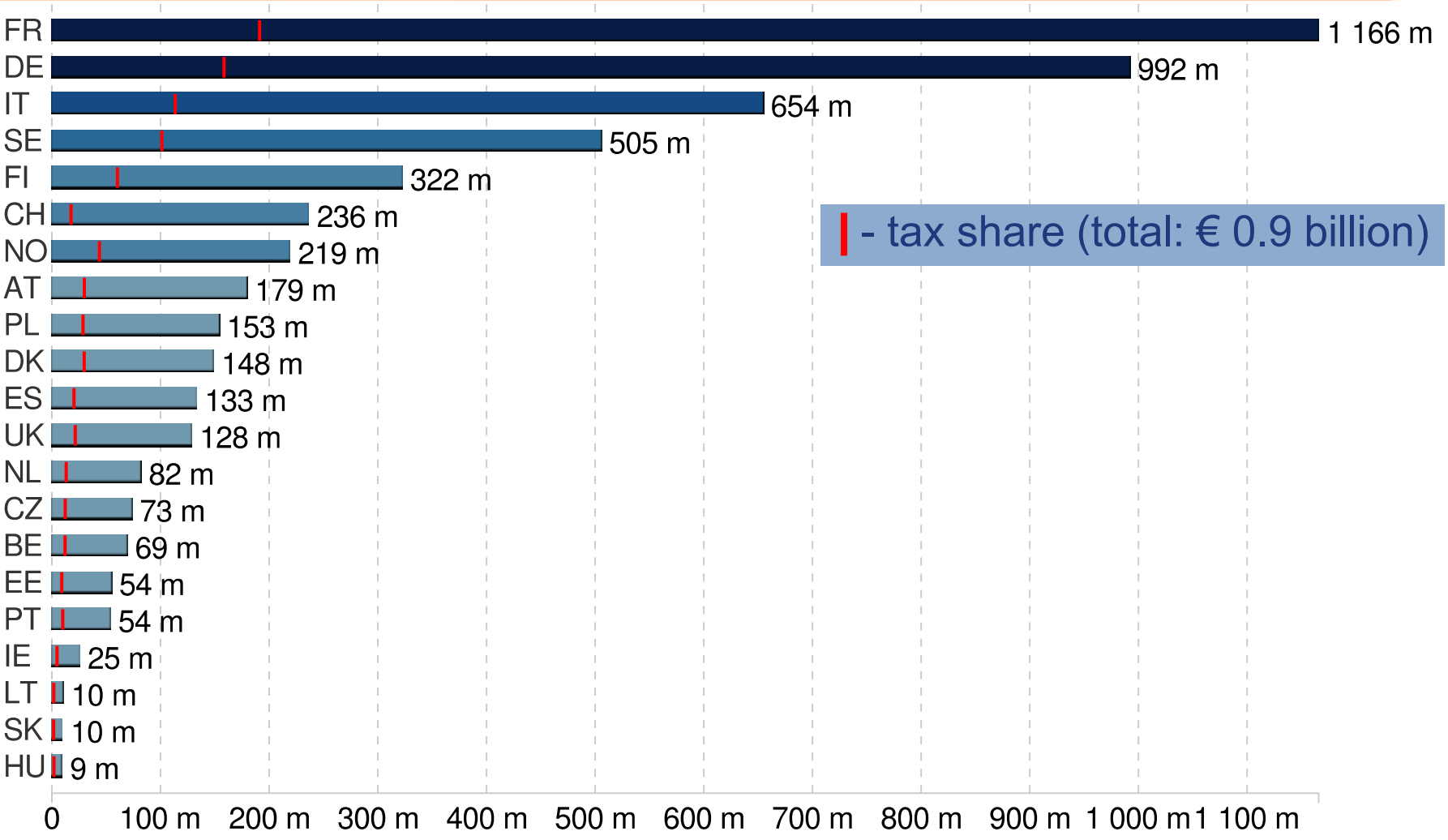
employment 2014 in man-years: 43 465

EUROPEAN HEAT PUMP SUMMIT

- total employment is higher
- technology leadership is in Europe

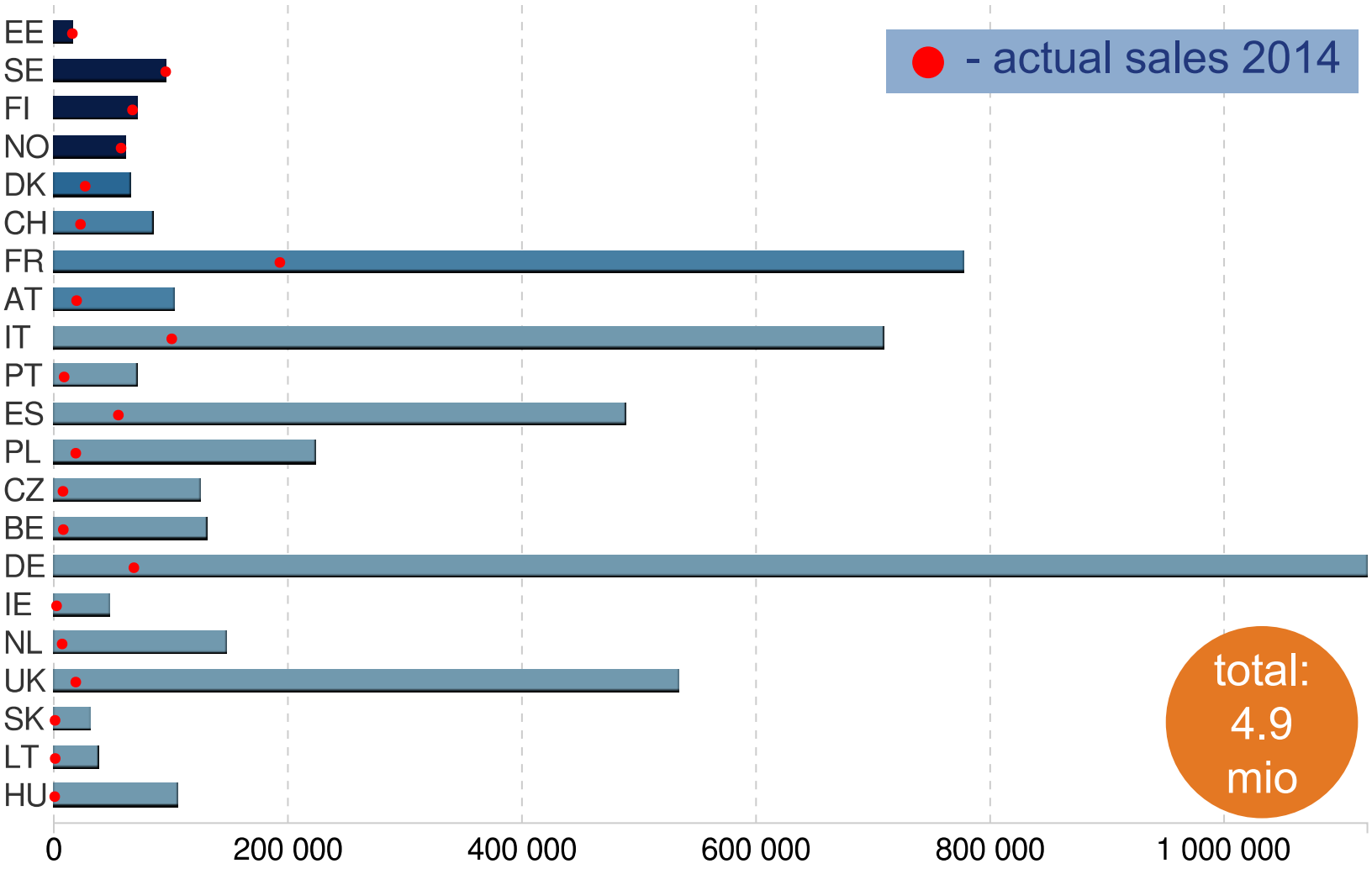


5.2 billion turnover in 2014



market potentials
if Sweden was everywhere

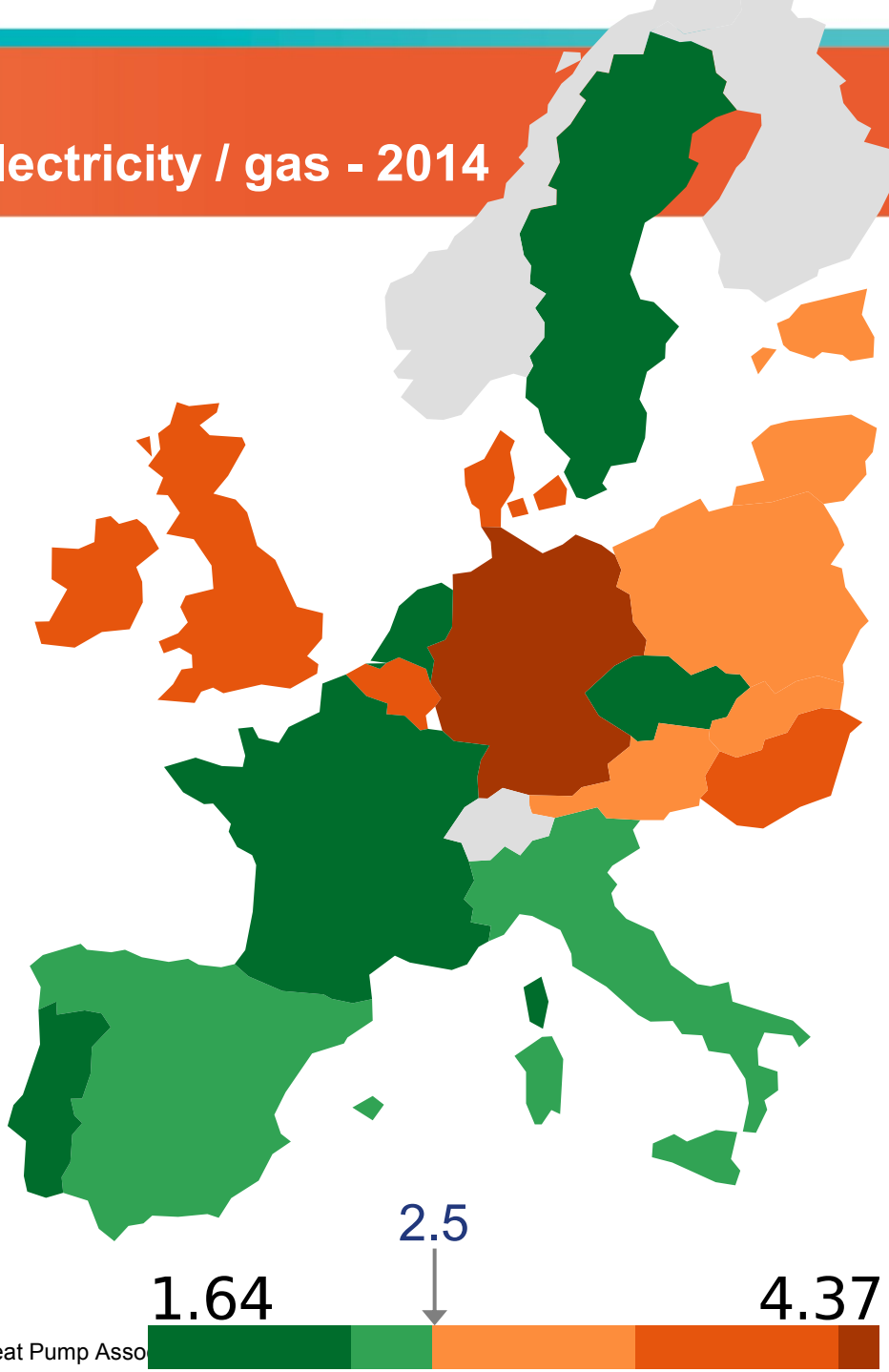
EUROPEAN HEAT PUMP SUMMIT



There is an elephant …

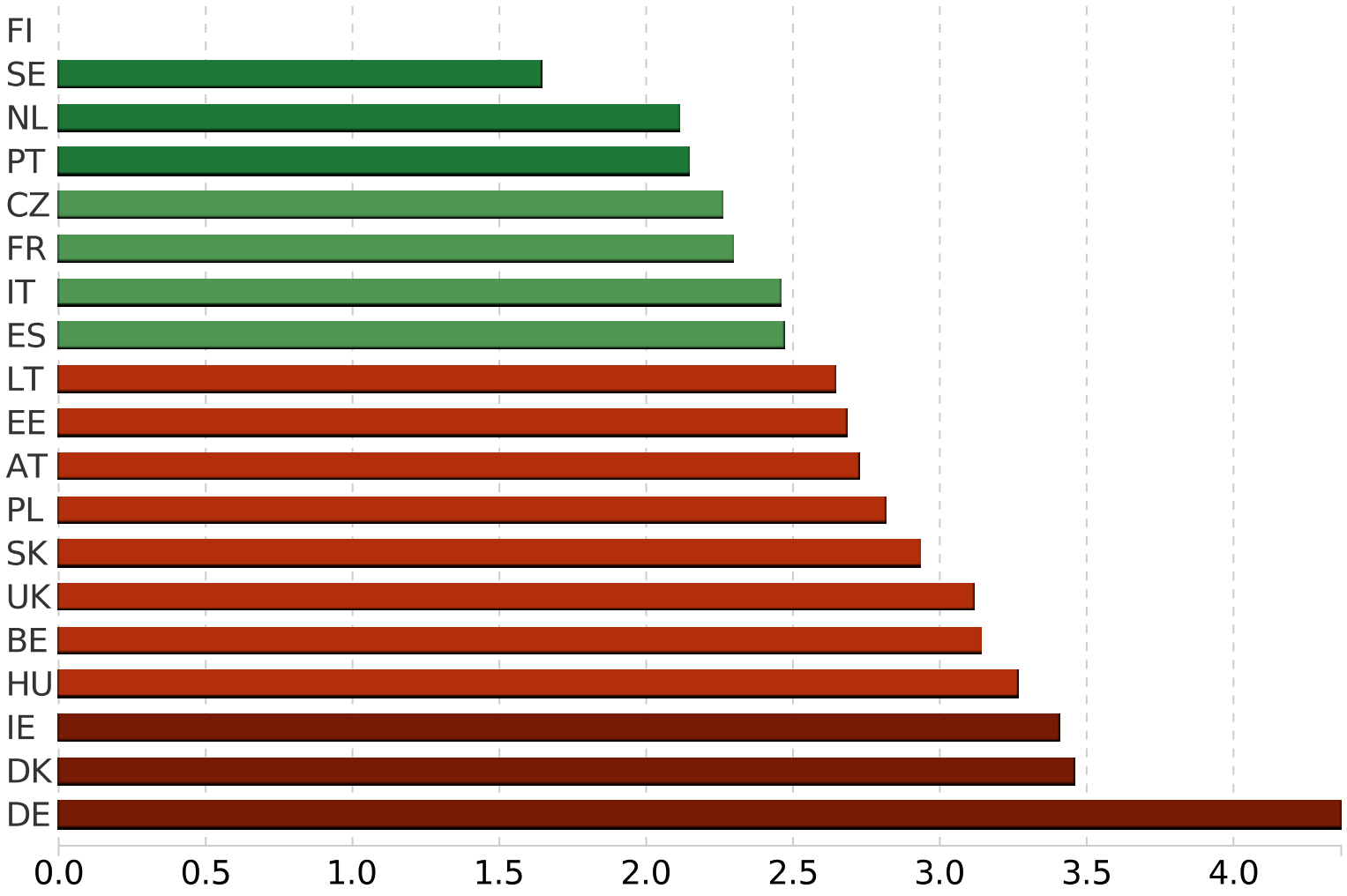
price ratio: electricity / gas - 2014

EUROPEAN HEAT PUMP SUMMIT



source: Eurostat

Infavorable price energy ratios dominate



So now what?

EUROPEAN HEAT PUMP SUMMIT

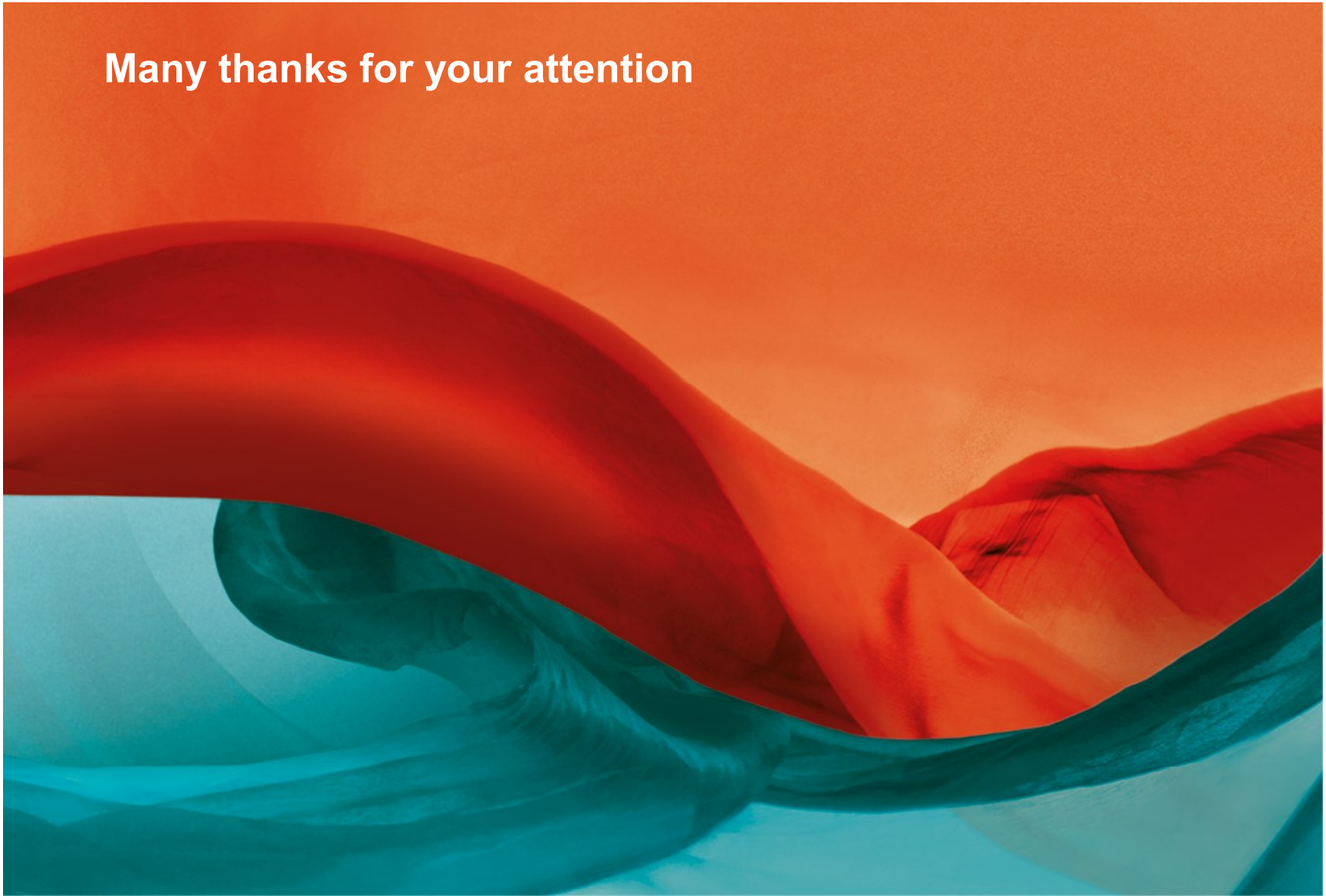
- Swift and decisive action
- Recognize heat pumps as best available technology
- **Technology selective approach**
- **Create proper price signals**
- socio-economic research to overcome deployment barriers

➔ make heat pumps ready for the mass market and
➔ make the mass market ready for heat pumps

In 2015 G7 leaders agree to phase out fossil fuel use by end of century

EUROPEAN HEAT PUMP SUMMIT

Many thanks for your attention



EUROPEAN HEAT PUMP SUMMIT

POWERED BY CHILLVENTA

SYMPOSIUM + EXPO
NUREMBERG, 20–21.10.2015

Industrial | Commercial | Residential
Heating & Cooling | Components & Equipment

hp-summit.de

NÜRNBERG MESSE