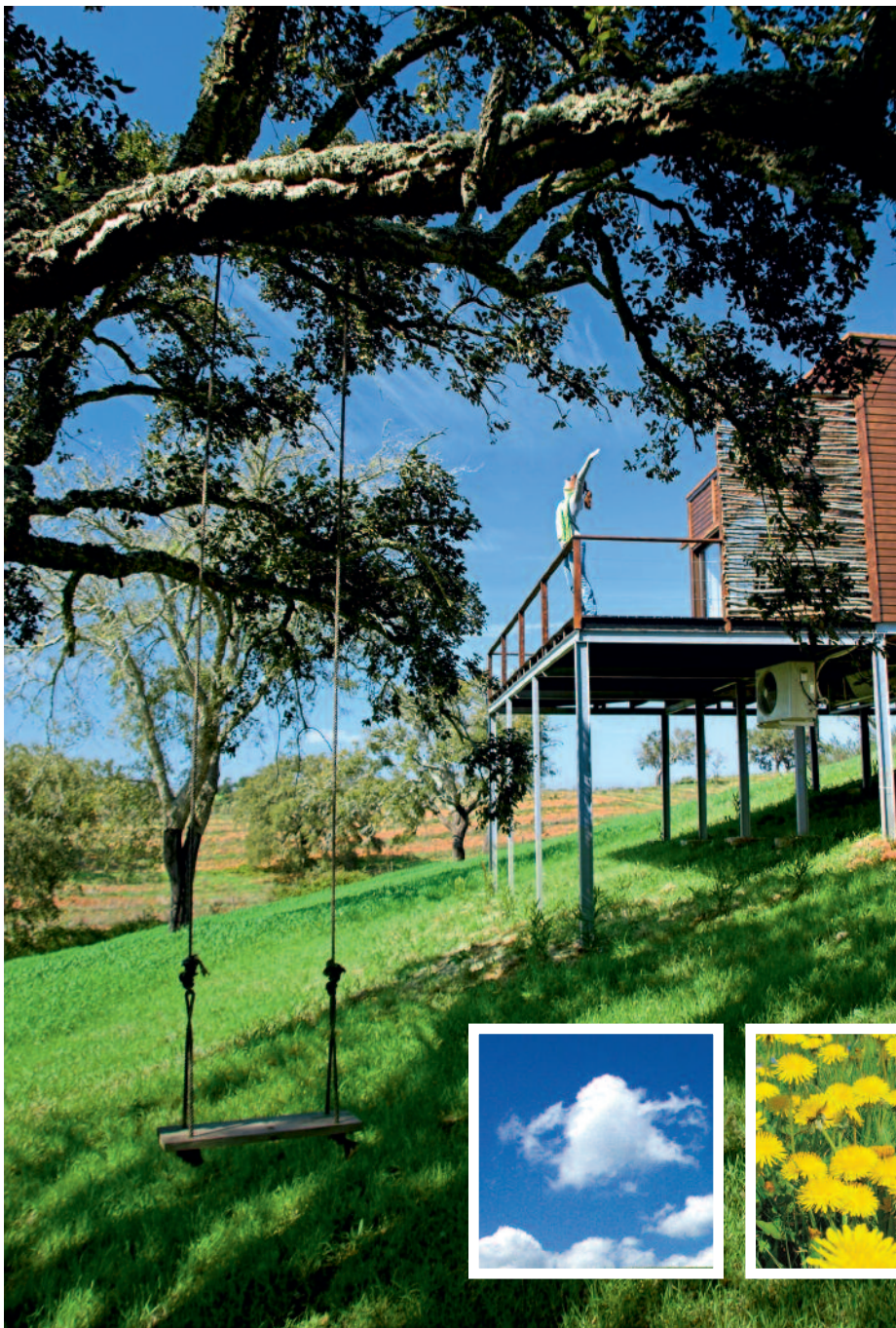




OUTLOOK 2009

European Heat Pump Statistics | Summary



1 | Executive Summary

In 2008, heat pumps became an established heating technology in the major European Countries. While it was necessary in previous years, to explain what a heat pump does, nowadays the technology is accepted, increasingly understood and more often chosen. Total sales in Europe have increased by nearly 50 % from 2007 to 2008 (see figure 1).

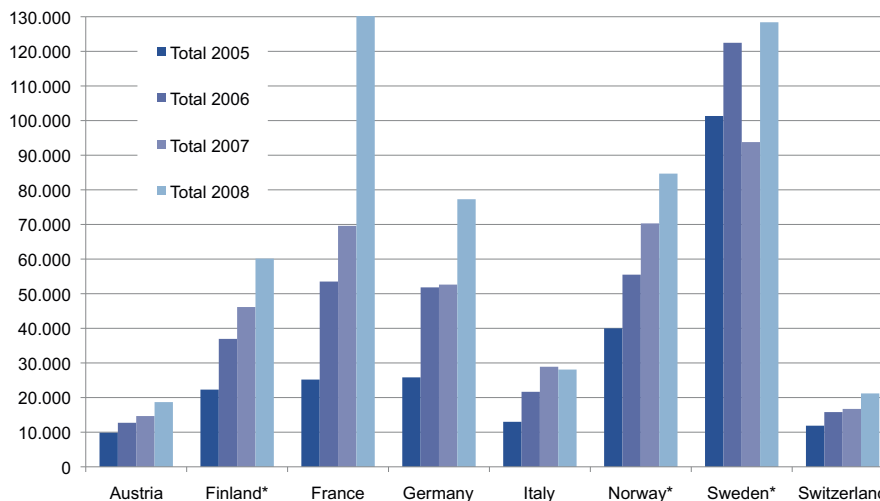


Figure 1: Market growth of total heat pump sales per country (2005 to 2008).

The major markets reported here show double digit growth rates with the positive exception of France, where sales figures more than doubled (+127%) due to a beneficial subsidy scheme (see figure 2).

This is particularly remarkable for established markets such as Sweden (+37%) and Switzerland (+27%). It can be explained by a widening of the application base from new houses to the renovation segment and by an increasing number of installed heat pumps in commercial buildings.

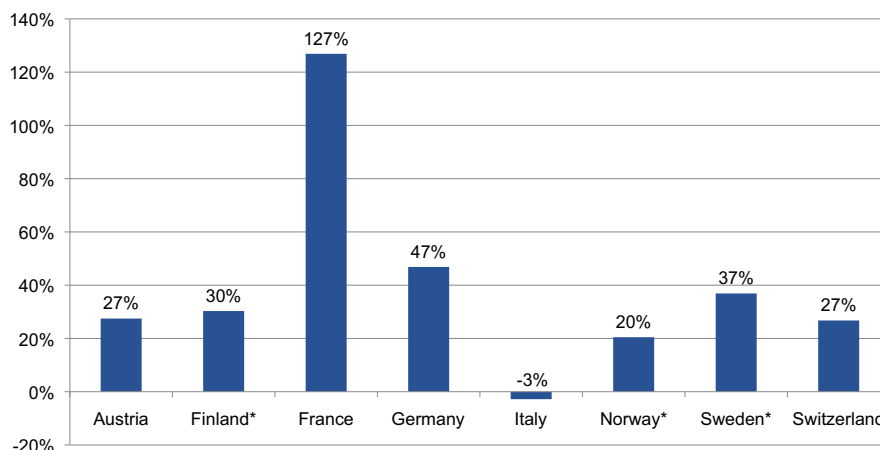


Figure 2: Relative market growth per country 2008 vs. 2007.

The increasingly strong installation numbers of heat pumps in the renovation segment backs the existing trend towards air-source units. In cases, where the building envelope can not be upgraded to a standard suitable for the efficient operation of heat pumps, the use of domestic hot water heat pumps is an option to assist traditional gas and oil boilers as well as biomass burners. As several countries have inaugurated minimum shares of renewable sources in total energy supply to the building, this product segment sees exceptional growth.

A comparison to last years statistics shows the influence of framework conditions on demand: Germany is up to speed (+47%) after last years market was characterised by a consolidation due to an increase in VAT, the inclusion of heat pumps into the existing subsidy scheme shows initial positive effects. As mentioned already, success in the French market is a result of government action.

When looking at the type of energy source used, the general trend points towards air-source heat pumps. Generally, more and more heat pump units are reversible and provide heating, cooling and hot water. The majority of these units is again using air as the main energy source. A closer focus to the segment of heating only heat pumps reveals the strong growth of air-water units (see figure 3). This development is a strong indicator for the development of the renovation segment, as air-water and – in the Scandinavian countries and Southern Europe – reversible air-air are often simpler to employ when refurbishing a building. Sales numbers for tap-water only heat pumps have more than doubled (+122%) from 2007 to 2008. As this type of heat pump is often used to augment a gas/oil fired boiler, increasing numbers do support the trend of using heat pumps in the renovation sector.

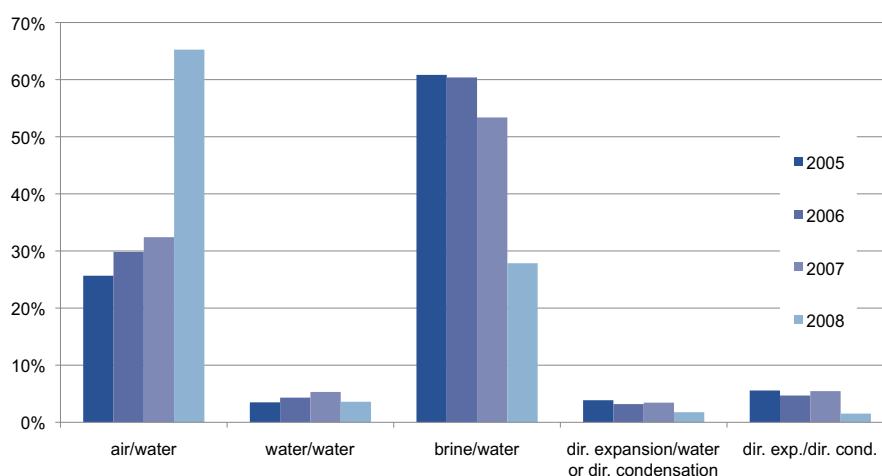


Figure 3: Change of market shares in the heating-only segment.

New European and national legislation, most prominently the Directive on the promotion of the use of energy from renewable sources has considerably improved framework conditions for heat pump markets in all European countries.

	2005	2006	2007	2008
units sold	249.394	370.447	392.756	576.392
		+48,5%	+6%	+46,8%

Table 1: Total sales in eight EU-countries 2005–2008.

The total market size for the 8 countries surveyed here has reached 576.392 units in 2008, a 46,8% increase over last years 392.756 units (see table 1). The outlook for 2009 is very positive with an expected two-digit growth in the range of 20% for all countries and with additional markets reaching a development stage that justifies the preparation of sales statistics.

EHPA was established in the year 2000 as a European Economic Interest Group to promote awareness and proper deployment of heat pump technology in the European market place for residential, commercial and industrial applications. EHPA aims to provide technical and economic input to European, national and local authorities in legislative, regulatory and energy efficiency matters.

All activities are aimed at overcoming market barriers and dissemination of information in order to speed up market development of heat pumps for heating, cooling and hot water production.

More information can be found at www.ehpa.org

The full report can be purchased from the European Heat Pump Association.



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