

# European Solar Thermal Markets

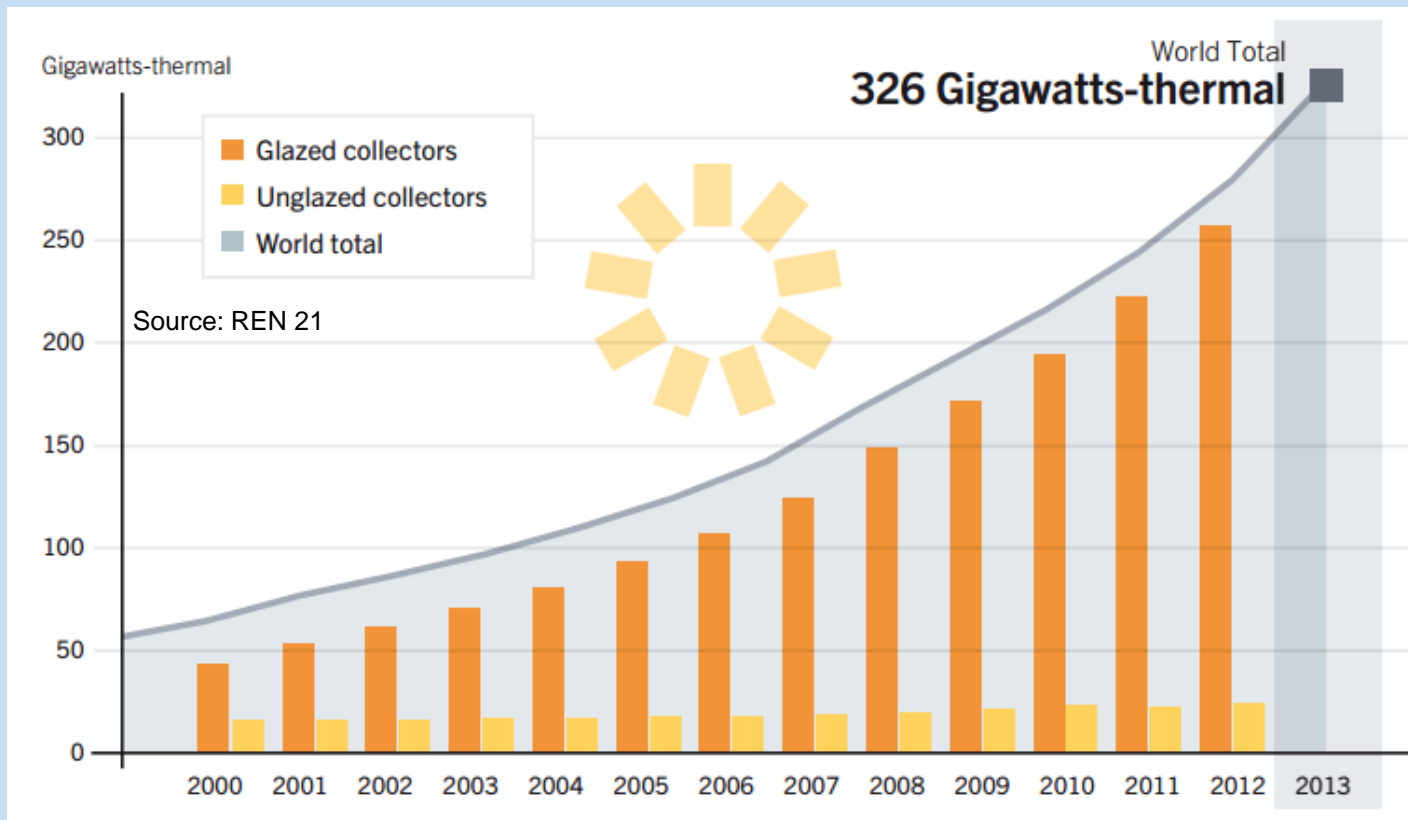
*Polish Solar Energy and Biomass Forum 2014*  
Racibórz, Poland  
*12<sup>th</sup> June 2014*

***Robin M Welling, President***  
***European Solar Thermal Industry Federation***



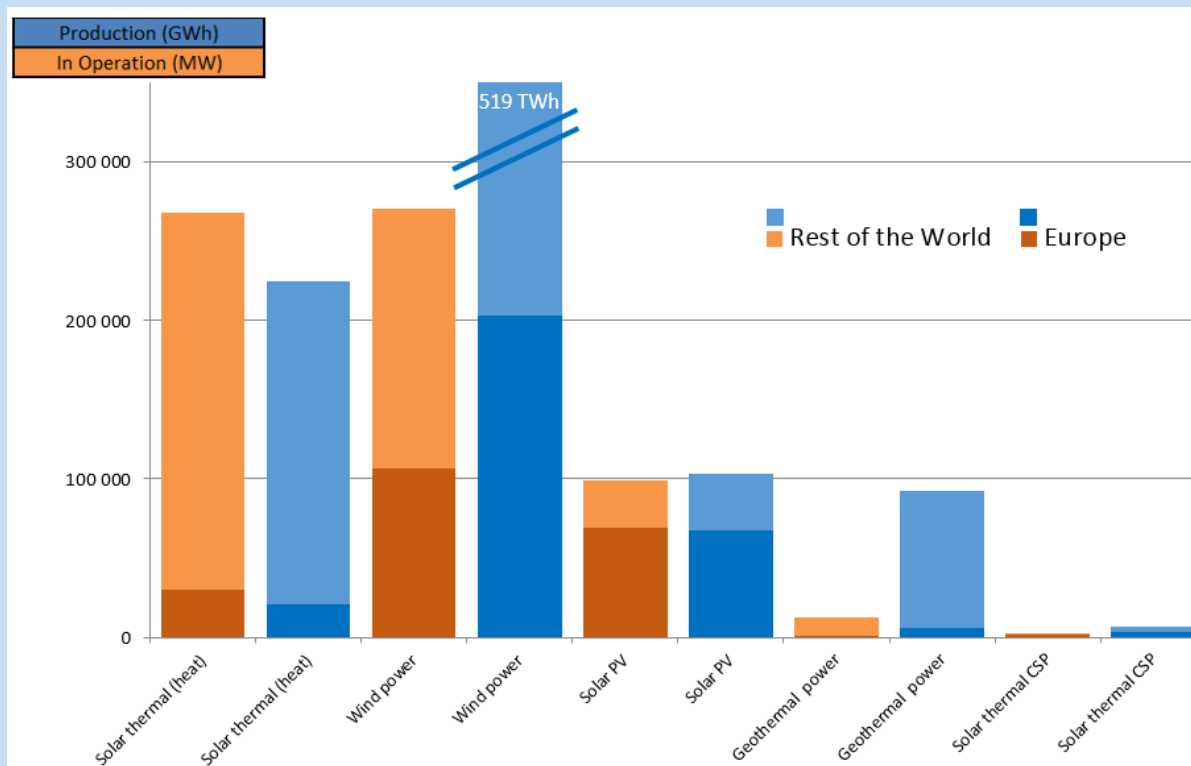
# Solar thermal global market development

- Fast development
  - Over three fold growth in ten years – 14% in 2012
  - Yearly growth varies between 9% (2004) and 34% (2008)



# Solar thermal within RES globally

- Solar thermal is one of the main RES
  - Most relevant decentralised and emissions free RES
    - Decentralised – excellent option for uses of the main
    - Emissions free – great option for use in cities (contrary to fuels or biomass)



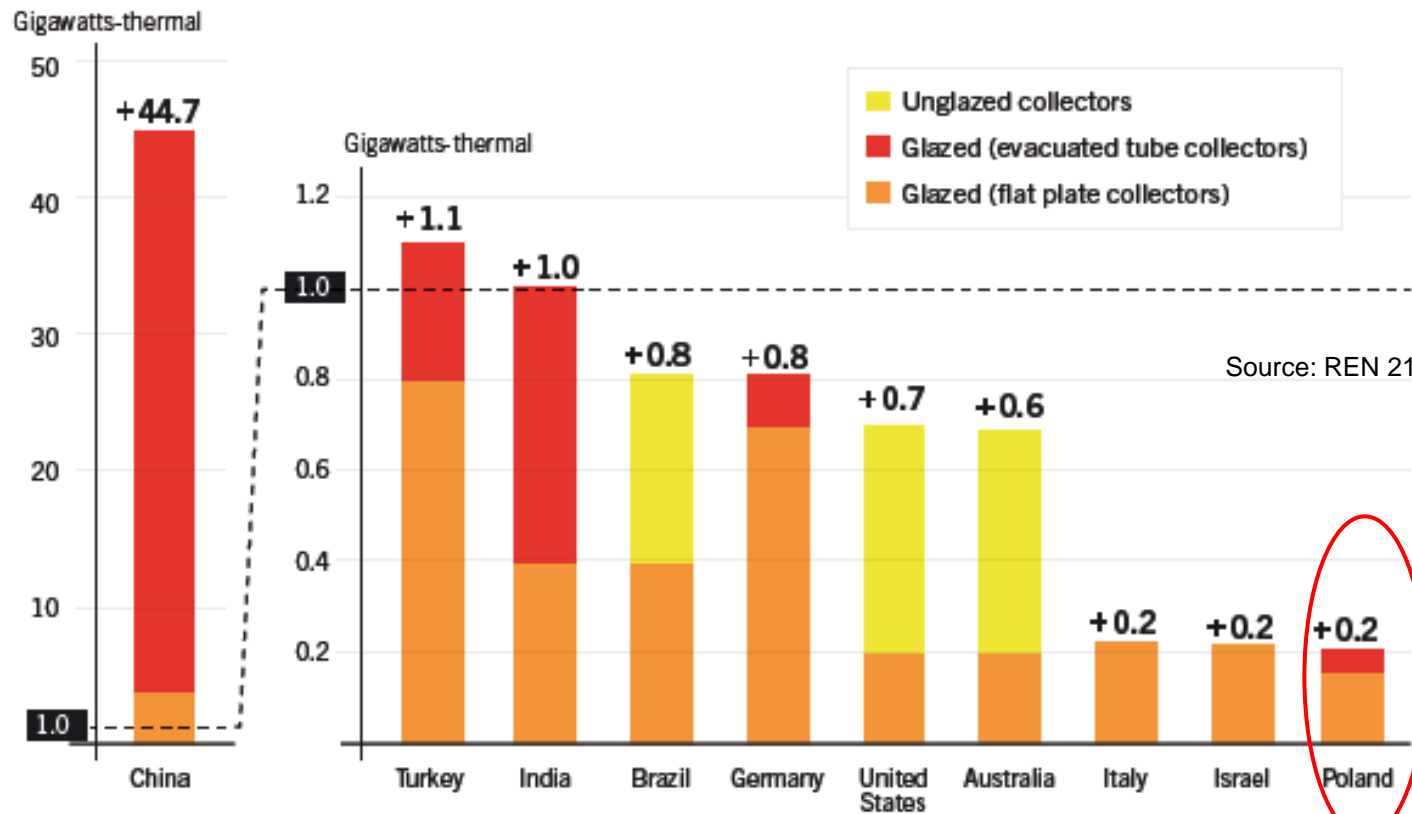
## Sources:

Solar Heat Worldwide  
2013 – IEA-SHC

The State of Renewable  
Energies in Europe 2013 –  
Eurobserv'ER

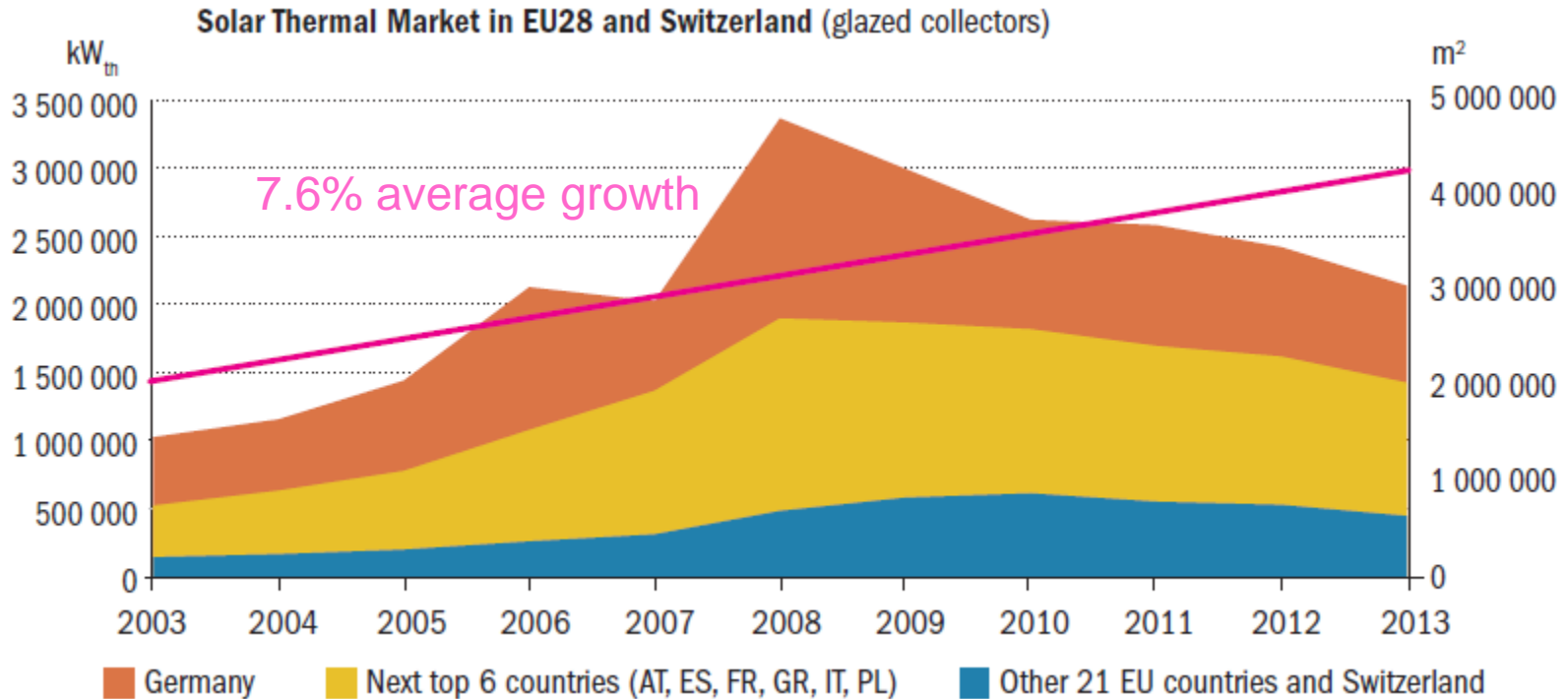
# Solar thermal global capacity

- “Dragon” share for China
  - Turkey, India and Brazil becoming major world markets
  - European countries relevant but with lower percentage of world market



Solar Water Heating Collector Additions, Top 10 Countries for Capacity Added, 2012

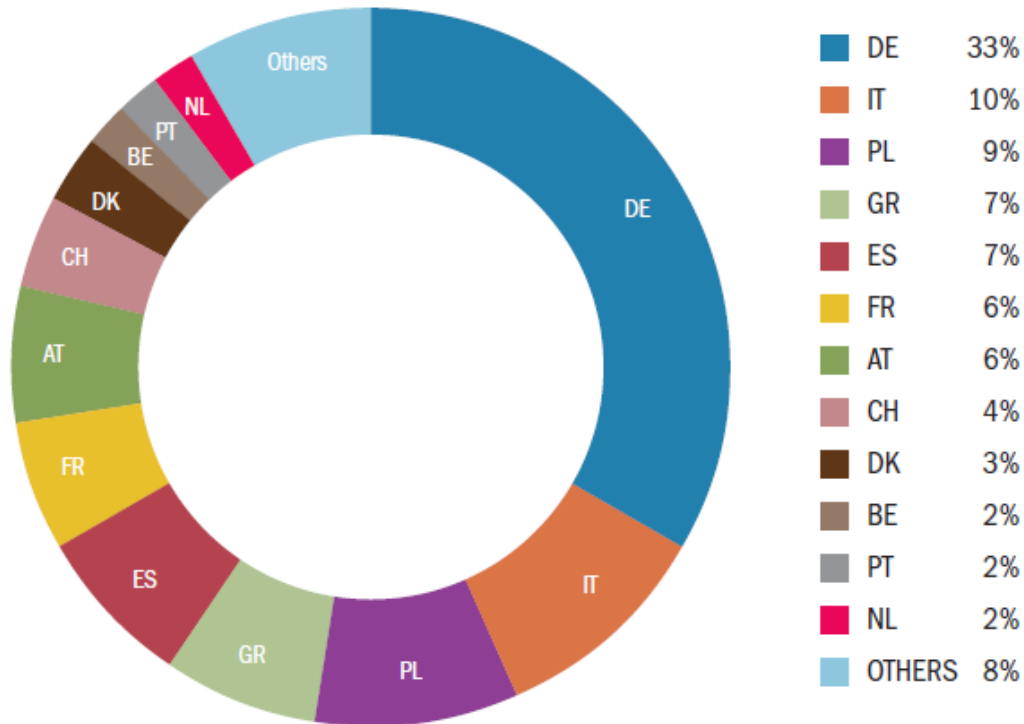
# European market: overall



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Solar  
Thermal  
Industry  
Federation

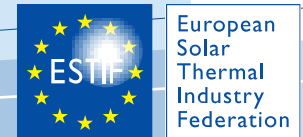
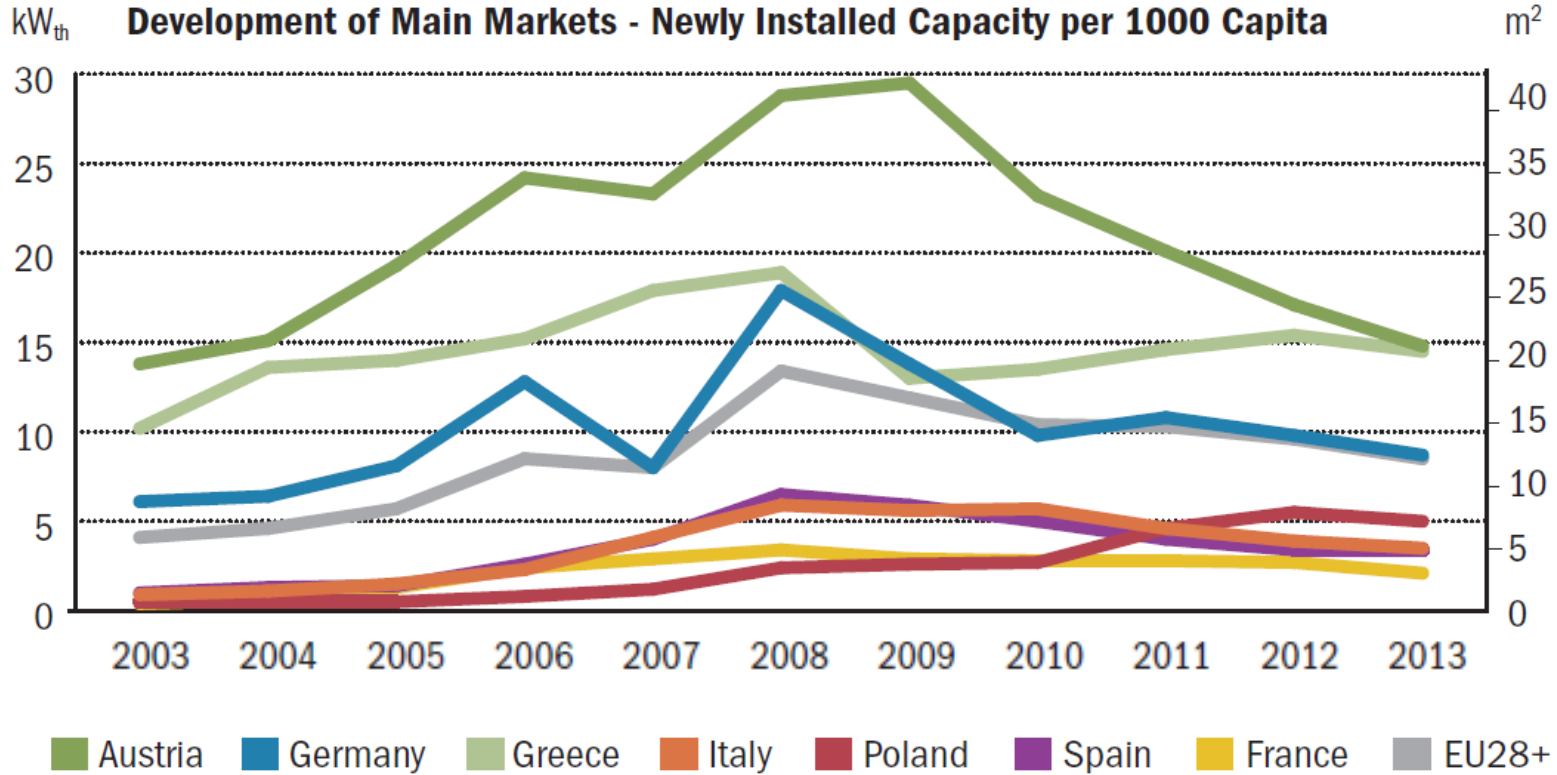
# European market: shares per country

Shares of the European Solar Thermal Market (Newly Installed Capacity)

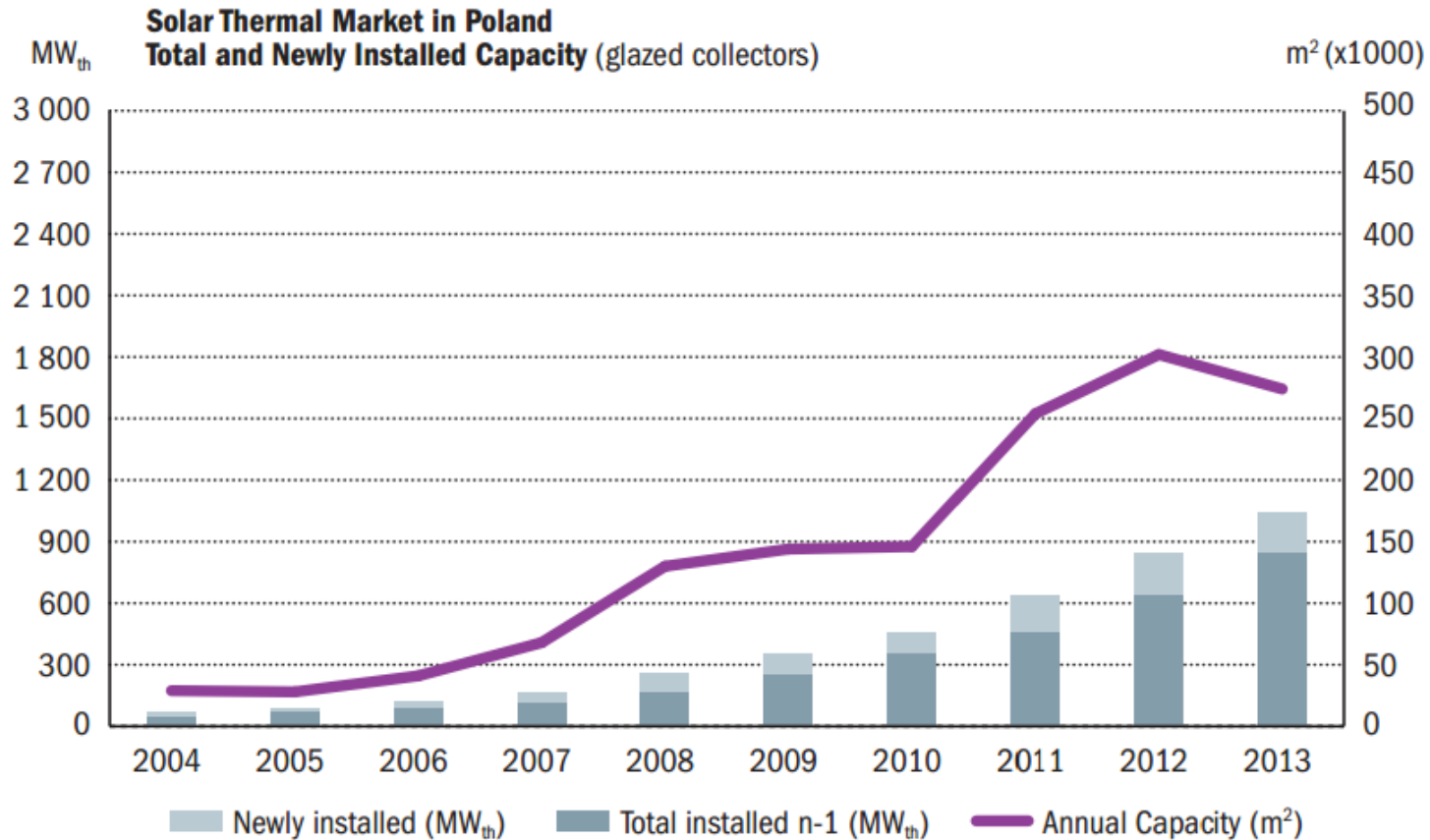


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Solar  
Thermal  
Industry  
Federation

# European market: main markets



# Polish market



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Thermal  
Industry  
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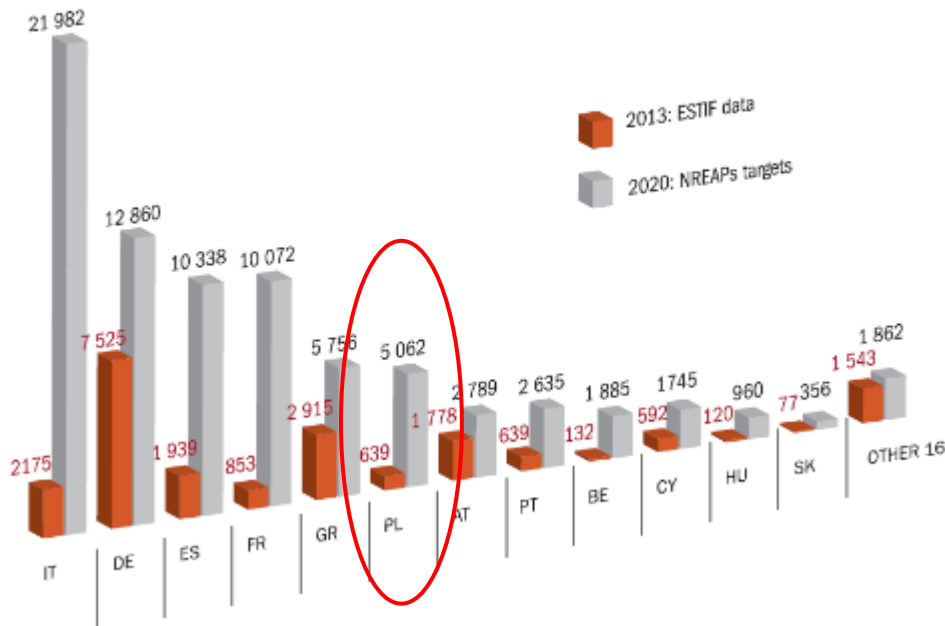


# Expected developments

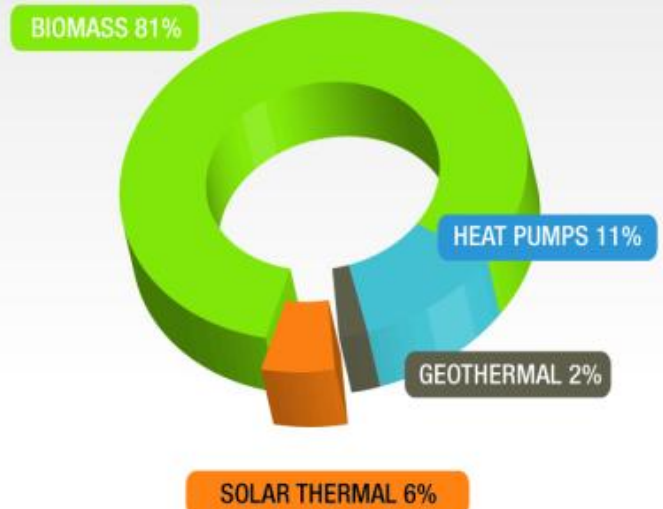
## ■ New regulations

- Solar thermal is a cost-effective & fast-effect way to achieve the 2020 targets
- National RE action plans foresee 146 mio m<sup>2</sup> by 2020 (46 mio today)
- RES heating & cooling key action for “fuel switch” according to EC (energy security)

Solar heat generation in Europe

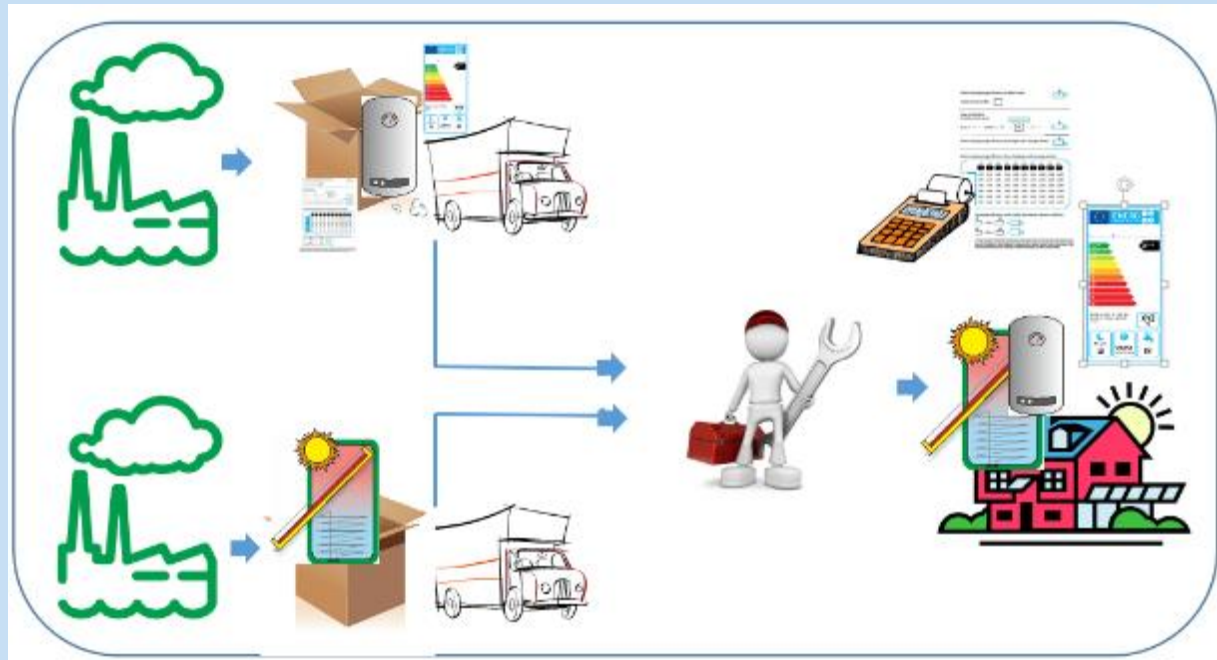
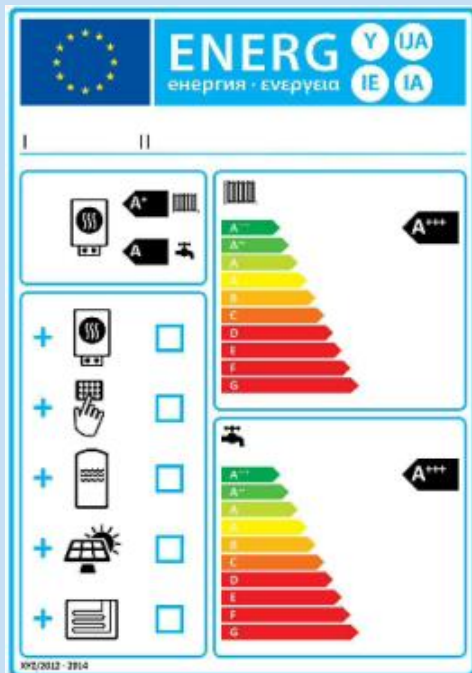


2020 targets for renewable heating and cooling per technology



# Expected developments

- New regulations
  - Energy labeling represents an opportunity for uptake of solar thermal systems
  - Water heaters: only packages foreseen are with solar thermal
  - Space heaters: solar thermal allows for A+++



# Expected development in Europe (2020)





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Please do not hesitate  
to contact us:

European Solar Thermal Industry  
Federation (ESTIF)  
Renewable Energy House  
Rue d'Arlon 63-67  
B-1040 Brussels

Tel: +32 2 546 19 38  
Fax: +32 2 546 19 39

Email: [info@estif.org](mailto:info@estif.org)  
Website: [www.estif.org](http://www.estif.org)



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