

The German Heat Pump Market



Dipl. Ing (FH) Alexander Lyssoudis

Member of managing board of federal heat pump association Germany

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



**In 1993, the German Heat Pump Association
(*Bundesverband WärmePumpe (BWP) e. V.*)
was founded.**

Its goals included quality assurance, marketing and advertising as well as firm establishment of services and customer service, the aim being to revive the heat pump market.

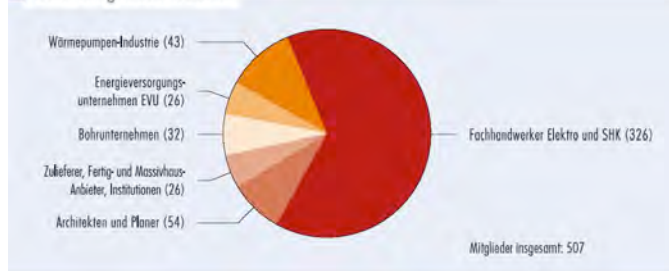
Every significant manufacturer on the german market, power supply utilities, drill companies, architects and planners, technical service companies (sanitary and heating, electrical), expert and testing and research institutes joined.

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



BWP-Mitgliederstruktur



Currently 43 manufacturers, 26 energy supply utilities, 32 drilling companies, 54 planners and 326 technical installation companies are members of the Federal Heat Pump Association (BWP) e. V.

The BWP still sees itself as a neutral mediator between owner-builders, technical service companies, planners, architects, manufacturers and energy supply companies.

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



A view back

Following a peak at the beginning of the eighties with heat pump sales totalling up to 12,000 units a year, the drop-off came in 1986. There were two reasons for this development.

- The price of oil had fallen to an all-time low and the quality of many of the heat pumps on the market was insufficient.
- Many small operations were producing heat pumps, but were unable to offer the attendant services.

The German heat pump industry, e.g. Stiebel Eltron, Siemens, Waterkotte and Dimplex, continued to invest in research and development with a view to serving foreign markets, above all Switzerland.

Bundesverband WärmePumpe (BWP) e. V.

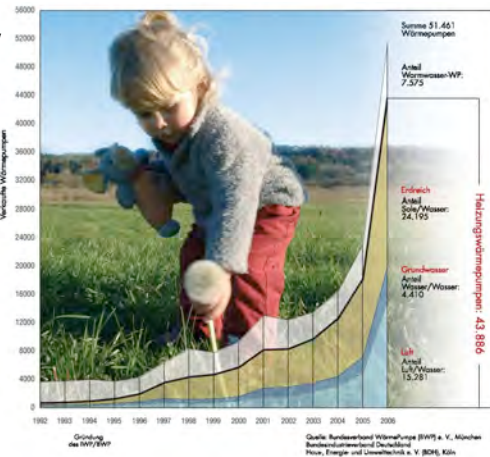
The German Heat Pump Market



The customers understood: 51,461 Heat Pumps sold in 2007

In the past 14 years, growth figures exceeding 30 percent have been achieved. 2006 saw sales of 51,461 heat pumps including 43,886 heating heat pumps and 7,575 hot-water heat pumps.

The proportion of heat pumps installed in new buildings (single and multi-family buildings) was around 20 percent. More than 190,000 heat pump heating systems are currently installed in Germany.



Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



What is the reason for the increasing success?

Several factors are responsible for the growing popularity of the heat pump. On the one hand, new generation heat pumps not only produce heat and hot water on site reliably and without a flame, but also, with an appropriate design they can also ventilate and cool. In addition to this, compact units are on offer, in which all this is achieved by only one device. High inlet and return temperatures can be realised, as are necessary for the modernisation of old buildings.



Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



What is the reason for the increasing success?

Rising oil and gas prices have made home owners more sensitive to heating costs. The uncertainty of future fossil fuel prices and the fact that with a correctly dimensioned and professionally installed heat pump heating system the heating costs can be virtually halved certainly also influenced the purchase decision.

The EnEV (a national Energy consumption rule) had lead to another growth of the heat pump market due to positive aspects calculating the CO2 emmission from heat pump driven heating systems.

Bundesverband Wärmepumpe (BWP) e. V.

The German Heat Pump Market



In Germany, brine/water heat pumps are showing the highest sales volumes (2006: + 116.90 %).

Sales figures for air/water heat pumps have gone up considerably (2006: + 202.23 %).

Groundwater heat pumps are showing as well a good growth rate (2006: + 93.76 %).

Bundesverband Wärmepumpe (BWP) e. V.

The German Heat Pump Market



Increasing popularity of air/water heat pumps

The increasing popularity of air/water heat pumps is due in part to the reduced heat requirements of buildings in accordance with the specifications of the Energy Savings Ordinance (EnEV) and in part to the improved efficiency of the devices.



The fact that less construction work is required for installations plays a major role and makes utilization of the heat source air interesting when it comes to modernizing a heating system.

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



The main area of use for heat pump heating systems in Germany is still new structures.

At the same time, the market of existing structures is also being opened up by the improved equipment efficiency figures as well as by the air/water heat pumps that have now been on the market since about 2002 with feed temperatures of 65 °C.

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



The German market for heating is in the change.

**Oil- and gas-fired heating systems are stagnating and slightly recessive.
Systems using renewable energy sources are growing strongly.**

Against the constraints of the German commitment to reduce CO₂ emission, the field of heat supply represents an enormous potential of avoidance. This could be turned to account by at least partly replacing conventional heat supply equipment by for example heat pumps plus heat recovery and the possibility of simultaneous cooling.

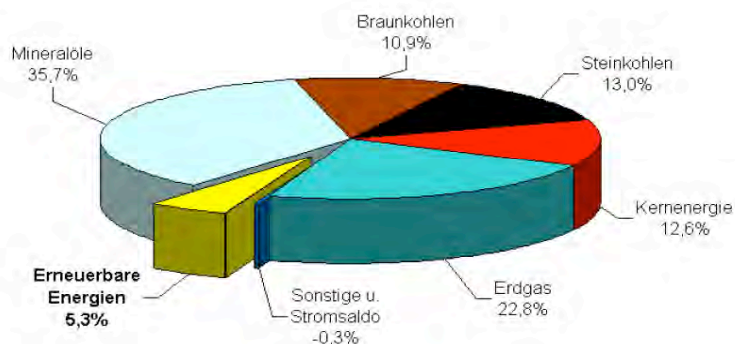
Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Primary energy structure in Germany 2006

Struktur des Primärenergieverbrauchs in Deutschland 2006
Gesamt: 14.464 PJ



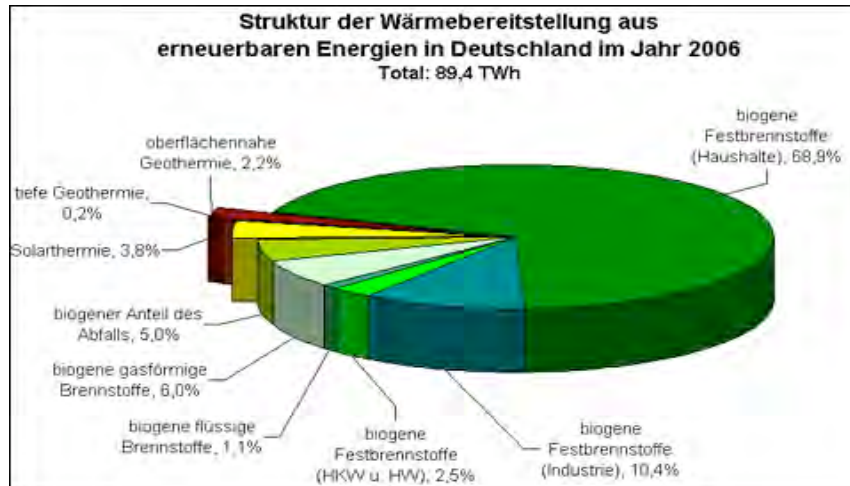
Quellen: Zentrum für Sonnenenergie- und Wasserstoff-Forschung Baden-Württemberg (ZSW); nach Arbeitsgruppe Erneuerbare Energien-Statistik (AGEE-Stat); Arbeitsgemeinschaft Energiebilanzen (AGEB); Wirkungsgradmethode; vorläufige Angaben, Stand Februar 2007

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Thermal Energy out of renewables

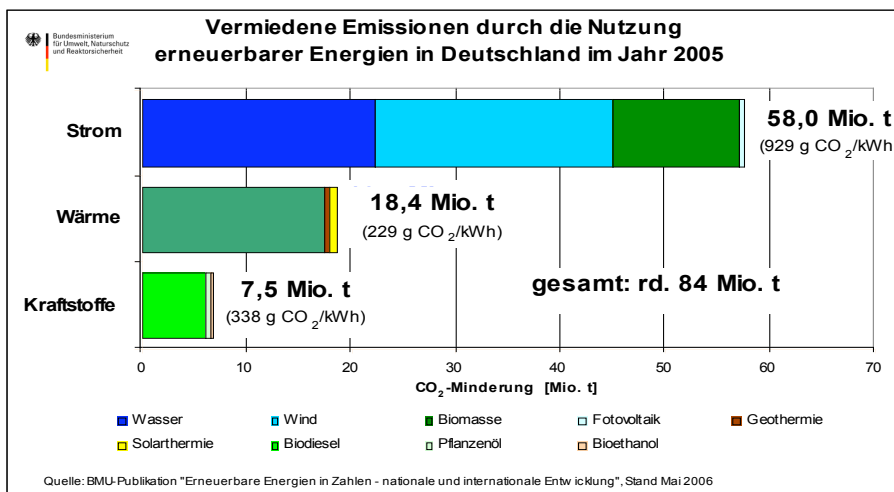


Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Reduced CO2 Emissions due to renewables



Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Market on heating systems in Germany

	2004	2005	Veränderung %
Öl-Brennwertkessel	19.000	22.000	15,8
NT-Gaskessel	217.000	174.000	-19,8
Ölkessel	185.000	144.000	-22,2
Gas-Brennwertkessel	347.000	320.000	-7,8
Summe Kessel	768.000	660.000	-14,1
Holzpelletsheizungen	8.000	16.000	100,0
Wärmepumpen	16.000	23.100	44,4
Summe	792.000	699.100	-11,7

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Marktentwicklung Holz-Pelletsheizungen

Jährlich neu installierte Anlagen in Deutschland



© Grafik: Solar Promotion GmbH 2006 | Quelle: DEPV/Baifa - Prognose: DEPV

Bundesverband WärmePumpe (BWP) e. V.

The German Heat Pump Market



Energieeffiziente Heizungen sind zukunftssicher!
Wärmepumpen-Absatz 2006 hat sich mehr als verdoppelt!



Gründung
des IWP/BWP

Quelle: Bundesverband WärmePumpe (BWP) e. V., München
Bundesindustrieverband Deutschland
Haus-, Energie- und Umwelttechnik e. V. (BDH), Köln

Bundesverband WärmePumpe (BWP) e. V.