EHPASTATS WEBINAR

French market
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Market trends in France - A/W and W/W Heat Pumps

- Units (P = 2 à 50 kW)

Credit tax 50%
new build and retrofit
Oil price increase

Credit tax decrease
Oil price decrease
Bad references

Growth in new build / RT 2012

Tax credit 30%
ErP / Labelling

2018
101.925 (+ 18%)

Credit tax decrease
Oil price decrease
Bad references

Growth in new build / RT 2012

Tax credit 30%
ErP / Labelling

2018
101.925 (+ 18%)

Product certification (compulsory factory audit)
Training and certification of installers (QUALIPAC)

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Details/type of HP – 2008-2018
## Details/type of HP – 2018/2017

**FRENCH MARKET IN 2018**

### A – GEOTHERMAL HP (2,5 % of the market)

<table>
<thead>
<tr>
<th>Source Type</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground source</td>
<td>560</td>
<td>-7%</td>
</tr>
<tr>
<td>Water source</td>
<td>1.937</td>
<td>+2%</td>
</tr>
<tr>
<td><strong>TOTAL A</strong></td>
<td><strong>2.497</strong></td>
<td>(=)</td>
</tr>
</tbody>
</table>

### B – AEROTHERMAL « A /W » (97,5 % of the market)

<table>
<thead>
<tr>
<th>Type</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monobloc</td>
<td>8.574</td>
<td>+10%</td>
</tr>
<tr>
<td>Bi-bloc</td>
<td>88.002</td>
<td>+16%</td>
</tr>
<tr>
<td><strong>TOTAL B</strong></td>
<td><strong>96.576</strong></td>
<td>(+16%)</td>
</tr>
</tbody>
</table>

**TOTAL A+B**: **99.073** (+15%)

(Source PAC & Clim'info)
Details for geothermal HP in 2018

GEOTHERMAL HP = 2,497 units
1st year of stability since 2008

New building sector = 35 %
Renovation sector = 65 %

Brine/water and water/water HP (1,937 units):
78% of the geothermal HP +2% / 2017

Medium temperature 55/65°C : 70%

Display per heat output

- de 5 à 10 kW (-1%); 39%
- de 11 à 20 kW (+4%); 44%
- de 21 à 30 kW (+7%); 13%
- de 31 à 50 kW (+5%); 4%
Details for aerothermal HP in 2018

AEROTHERMAL HP (96,576 units +16%/2017)
97,5 % of the market

New building sector = 65 %
Renovation sector = 35 %

Display / type:
Monobloc = 9% with 8,574 units (+10%)
Bi-Bloc* = 91% with 88,002 units (+16%)

Medium temperature 55/65°C = 35,969 (+71%)
High temperature > 65°C = 7,023 (+58%)

Display / heat output
For Bi-Bloc
Details for other HP in 2018

**HP WATER HEATER**

New building sector: 61%
Renovation sector: 39%

**HYBRIDS HP (AFPAC estimation)**

**AIR/AIR HP (<17.5 kW)**

(\textit{Monosplit : 423.730 (+16 %) - Multisplit : 147.410 (+24%)}))

with 57.000 for heating only (+18%)
HP SECTOR IN FRANCE IN 2018

STOCKS IN INDIVIDUAL HOUSINGS
All types incl HP WH: 3.200.000 units

CARBON FOOTPRINT
- 6,7 millions of CO2 tons saved
- 1 660 kTep saved
- 19 300 GWh: ReN production coming from HP

ECONOMIC FIGURES:
- turnover: 3,1 billion euros
- jobs: 24.000
- 20 plants
Forecast in FR – short term

In 2019: a new scheme for subsidies

“Coup de pouce” = bonus for replacing old boiler, especially oil boilers

Co-financing with utilities (energy saving certificates program) and the national renovation building agency (for modest income families)

• For modest income families: subsidies = almost 100% of the costs

Offers for HP at 1€

• For all families: subsidies = about 50% of the costs

For 2019: market expected to increase by +50% thanks to renovation
TENDANCIÉS FOR 2019 (JAN TO MAY / 2018)

AIR/WATER HP
- + 50%
- At minimum +30% expected for 2019

GROUND SOURCE HP
- + 9%

HP WATER HEATER
- + 16%
TENDANCES FOR 2019 (JAN TO MAY / 2018)
Our priority: quality, compulsory to ensure good and sustainable development

Quality of the product
• In France, almost all Heat Pumps are certified from 2008

Quality of the installation
• 8000 installers (companies) certified for HP
• Mandatory audits on site to avoid bad performances

Maintenance of the Heat pump
• AFPAC: Toolbox for installers
• Offer: need to be developed
Our priority: quality, compulsory to ensure good and sustainable development

**AFPAC’s 10 commandments to install a Heat Pump**

1. What are your needs (heating, SHW, cooling, …)
2. Be sure that the installer is certified for HP
3. Ask for several cost estimates
4. Don’t pay attention to offers proposed without a visit
5. Don’t buy a HP at a fair (to have the right to ressiliate)
6. Be sure that the product is certified
7. Ask for the thermal study necessary to design your HP within the estimate
8. Verify that the offer includes: acceptance doc of work, putting into service, pick up explanations
9. Demand written guarantee conditions
10. Ask for a maintenance contract
Thank you for your attention