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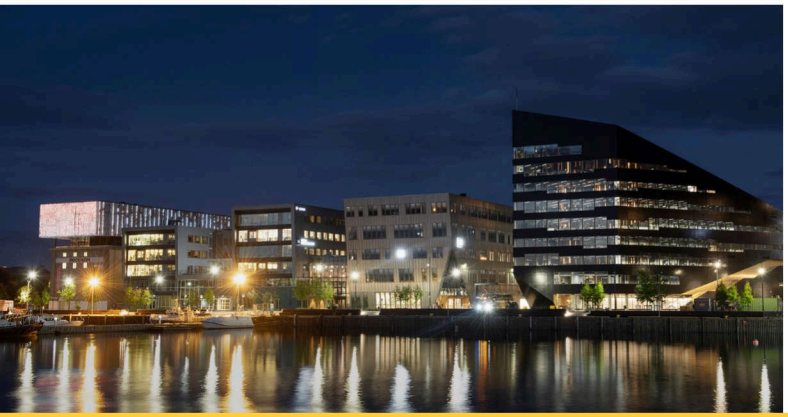
European Heat Pump Market and Statistics **Report 2022**

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Editorial

Dear Reader of the Market and Statistics Report 2021,

At the beginning of 2021, I was utterly optimistic for the market development over the rest of the year. The first quarter had been positive and all signs pointed towards growth. It turned out differently as we all now know, but still, the result was good, considering the circumstances.

By the end of 2021, we count a total of 16.96 million heat pump units installed in the 21 countries covered by this report. This is a plus of +33.8% or 547 840 units over 2021. The top three markets combined account for 48% of all sales with the top 10 markets being responsible for 87% of annual sales. A new player entered the top 3 leading markets: Germany. After the introduction of a very successful subsidy scheme, this market grew by +40% year-over-year. Also in 2021 the heat pump stock in Germany has exceeded one million units.

We expect the European markets to return to their double digit growth path in 2021, as more and more countries are adressing the energy transition in the heating sectors with meaningful measures. The United Kingdom has announced a target of 600 000 heatpumps to be sold annually by 2028 and plans to introduce a ban of oil and gas boilers within the next 5 years. France continues to be the strongest market in Europe. Recent announcements on a ban of fossil fuels in new buildings will support this status also in the future.

The European Union has presented its strategy for sector integration. The document foresees 40% of all residential and 65% of all commercial buildings to be heated by electricity in 2030. As the energy efficiency first principle is still valid, this means most of these buildings will be heated and cooled by heat pump systems.

The trend towards heat pump solutions in the build environment is fuelled by new product offerings for the renovation sector.

The Member States of the European Union have agreed on a 55% CO_2 emission reduction target to be achieved by 2030, a step that will inevitably require stronger ambition for the promotion of renewables, energy efficiency and system integration, not least in heating. A huge potential can be unleashed in existing buildings and industrial processes. A very strong growth is observable in this segment, in particular for drying processes. As well, many district heating systems operators are now turning towards high and very high capacity heat pump system. Most recently, the Danish city of Esbjerg decided in favor of a 50MW heat pump solution.

With technological progress and an even more welcoming policy framework, this development will continue and will enable the complete decarbonisation of heating and cooling.

What remains is the correction of the energy price system. In many European countries it is still more expensive for the end user to decide in favor of the most environmentally friendly heating and cooling solution. However the current ne-

gotiations around a climate law, CO_2 prices, energy taxation and fossil subsidies are addressing this topic. We will need to address end users financial means and in order to attract them to engage in the energy transition it will have to become more attractive to invest in light of the overall CO_2 emission targets.

A spill-over effect from photovoltaics is observable: building owners are currently attracted to buy an electric car, which leads them to consider a PV system on their roof. With more locally generated electricity, they wonder if and where they could use more of it on their premises. Here, they start to think in the direction of heat pumps.

I am convinced that this development will continue, as a fully electric building is a comfortable building. Enjoy the reading of this report.

Thomas Nowak

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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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