

European Heat Pump Association: Annual report 2022



Writers and contributors:

Thomas Nowak Sarah Azau Jozefien Vanbecelaere Dan Stefanica Savina Cenuse Tarik Bellahcene

Coordination:

Sarah Azau

Design:

JQ&ROS Visual Communications jqrosvisual.eu

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Foreword



Thomas Nowak Secretary-general, European Heat Pump Association (EHPA)

Looking back at 2022 it is impossible not to have mixed feelings. For heat pumps, it was a crucial and milestone year, as they were finally unequivocally recognised – by the EU, the IEA, the public – as a central part of the energy transition. A heat pump was shown on an official banner by the European Commission for the first time ever – a small but important change.

Heat pumps' new role was reflected in unprecedented growth. After a few years of double digit sales increases, 2022 broke a new record. Sales were up 38%, with about 3 million heat pumps sold. The total number of connected heating heat pumps is now around 20 million, in about 16% of Europe's residential and commercial buildings.

However glorious this sounds for the sector, one of the chief reasons for it is an awful one. The war waged on Ukraine by Russia in February and the terrible ensuing events have made the need to move away from fossil fuels even clearer. The EU's response in March – in the form of the <u>REPowerEU targets</u>, which would translate into 30 million additional hydronic heat pumps by 2030 – is a clear sign of the key role given to clean heating and cooling. We were able to provide input to the REPowerEU package that was published two months later and re-iterated the importance of heat pumps once more.

This growth and the increased EU drive to push the sector has also highlighted the challenges ahead. These are primarily the points we are calling for the EU to address through the <u>'accelerator'</u> – a call for an "all-hands-ondeck" move to speed up heat pump deployment. Ensuring long-term certainty in the sector at highest political level; re-thinking any measures which could impede the sector meet its goals; tackling the long-embedded unfairness of the energy sector whereby fossil fuels have all sorts of incentives including lower taxation levels, in order to finally make heat pumps the most affordable solution. The resulting increase in demand must be met by the value chain which requires investments in production capacity, knowledge provision and skills and training facilities. We took every opportunity last year to push forward our accelerator asks to EU decision makers and explain the importance of these points, alongside ongoing policy work like Ecodesign and refrigerants which intensified greatly towards the end of the year. And we are also following the negotiations on the Fit for 55% files, notably the renewable energy and the energy performance of buildings directives which will be completed in the next months. 2023 will see an ongoing work on the F-gas regulation as well as on sustainable products and Ecodesign.

Just recently, CleantechEurope was proposed as a new platform to ensure Europe's leadership in the production and sales of renewable energy technologies. This was followed by EU Commission von der Leyen's announcement in January 2023 of a forthcoming 'net zero industry' strategy – to which we provided input to and has since been published, in early 2023, as a 'Net-Zero Industry Act'. We continue to work hard on this and on the European Commission's recently announced forthcoming heat pump action plan.

EHPA's vital and complex advocacy work has been, and will be, supported by communications, media work and events to ensure all messages are clear, engaging and aligned. The relaunch of our website, ehpa.org, in October, is a key part of this as is a reinforced social media drive – testament to that is given by our LinkedIn account which now has well over 10,000 followers and on Twitter, with nearly 4,000! I am giving a bit of a more personal account in my own LinkedIn and Twitter profiles. **Please engage if you can, repost, retweet and contribute to the discussion.**

Our projects team has also been very busy this year, running and partnering on multiple projects, and winning six more. At the beginning of next year, we will be involved in ten different projects with 27 project events planned. The projects focus on everything from industrial heat pumps (the 'SPIRIT' project) to combining heat pumps with solar energy ('SunHorizon'). Being active in projects also keeps EHPA at the forefront of research and development and connects ourselves and the industry members to a thriving scientific community. A similar effect is achieved by working with our international partners, notable the International Energy Agency (IEA), its heat pump centre, the International Renewable Energy Agency (IRENA), the international institute for refrigeration, our colleagues in Japan and China as well as the Joint research center of the European commission (JRC) in Petten.

EHPA has gone from strength to strength too in its events. After a powerful high temperature heat pump symposium in March in Copenhagen and a very successful Decarb Cities in May in Vienna, we held a packed Heat Pump Forum in September. This event in Brussels landmark, the Atomium, was attended by a wide range of top speakers, including EU Commission Director General for the internal market Kerstin Jorna. At this event, which combined great discussions - including on an EU heat pump accelerator - with lots of networking, we also presented the 2022 Heat Pump Awards. We had received 51 applications for the Awards - the highest number yet and the judges agreed that this year was one of the most difficult to select a winner. We also organised multiple online seminars and I myself spoke at countless events in Europe and across the world.

In Europe we are cooperating with other associations in the electrification alliance, the renewable heating and cooling platform as well as in a rather loose collaboration on individual dossiers. On the international level, we continue to work in the Clean Heat Forum organised by the Global alliance for buildings and construction.

EHPA also continues to successfully manage two <u>certifi-</u> <u>cation schemes</u>: the Quality Label and Keymark. The increasing participation in these schemes show the sector's transparency and reliability. The high interest in the schemes at industry events this year showed they will only continue to grow!

A clear highlight of 2022 for all of us is surely the launch of the IEA's first event heat pump report. The report, which

puts heat pumps firmly on the map as a key part of the global energy system we need, sees their share of the worldwide heating market <u>double by 2030</u> if governments meet their commitments. EHPA was delighted to host the IEA including executive director Dr. Fatih Birol in Brussels for the livestreamed launch, along with European Commission director general for energy Ditte Juul Jorgenson and Nibe's CEO Gerteric Lindqvist.

All this hard work would not have been possible without our members. In that too, we have grown. As of today, we have over 180 member companies and associations - another record! For all their support and input into our work, I warmly thank all our members.

EHPA's vision is to make "heat pumps the number one technology for heating and cooling in a decarbonising Europe". In Brussels, a team of 20 professionals is putting in countless hours to make this vision a reality. We have made real progress on this journey and it will not take long before more than half of the heaters sold per year are heat pump based.

We rely on all our members' input to shape the association further, to sharpen its profile and increase its impact. Hence stay active and involved also in 2023.

This year's voyage may see us navigate some choppy waters as we address growth related challenges, but with all hands on deck, we can manage it!

Let me close with a positive message. After 15 years of hard work in the heat pump industry I can say: heat pumps – the best is yet to come!

Highlights

2022 Overview of key highlights by month

Source: Vaillant

EHPA event EHPA organises an event called 'The way towards 100% renewable February heating and cooling from local to European - the Croatian perspective'. EU policy EHPA event **REPowerEU** sets EHPA organises a high temperature March new heat pump heat pump symposium in targets for doubling Copenhagen, Denmark with sales by 2026. research organisations SINTEF and DTI. EHPA event EU policy Two of the three project proposals submitted by EHPA for EU Commission's F-gas Horizon Europe funding are successful and start in January 2023: April Proposal proposes a steep phase-down of **BEST-Storage ECHO** (Building energy efficient system F-gases. (Efficient compact modular through short and long spectrum thermal energy storage system) thermal energy storage) EHPA event REPowerEU action plan lists a May number of measures to increase Decarb Cities takes place in Vienna, heat pump roll-out, but concert-Austria, organised by EHPA. ed action is missing.

Jun	e	EHPA event EHPA's General Assembly.	on retrof	-	am organi pumps a	EHPA project even se two webinars, nd on large-scale	ts	
July		Webinar and online lar 2022 market report sh pump growth broke re	nowing heat	PA's	produc	ers: Installers and nel as the backbor	-	
Septen	nber	EHPA a Position paper on test calculation methods f pumps in Ecodesign.	-	Europe	h of Clear	ommunications n Heat gn, by EHPA	EHPA communication EHPA's updated website is launched: www.ehpa.org	ns
	Euro	EHPA projectsEHPA projectstart of two EU-funded projects in which EHPA is a partner:EU project event: Ambition requires action: mutual recognition agreements and the upskilling transformation.the Secretariat of the European Technology and Innovation Platform on Renewable Heating and Cooling in 2022-2025 (Horizon Europe project)EU project event: Ambition requires action: mutual recognition agreements and the upskilling transformation.						
SPIRIT on the implementation of sustainabl upgrade technologies for indust (Horizon Europe project)				entries (breaking	2022 Heat Pump Awards gathers 51 es (breaking the previous record of 34).			
	brings to	annual Heat Pump Foru ogether 141 people on-s shes with the Heat Pum	site and 433	online,	vent	Week policy ses heat pumps can	an EU Sustainable Energy sion on the flexibility that offer to the grid, together SmartEN and BEUC.	

EHPA report and event

October

EHPA's 'Thermally Driven Heat Pumps' report is published to explain the technology, followed by a webinar, with the European Heating Industry association. Start of the PUSH2HEAT project - 'Pushing forward the market potential and business models of waste heat valorisation by full-scale demonstration of next-gen heat upgrade technologies in various industrial contexts' (Horizon Europe project).

EHPA projects

EHPA projects

Start of the REDI4HEAT project – 'Renewable Energy Directive implementation for heating and cooling' (EU LIFE project).

EHPA report and event

November

International Agency Agency 'Future of heat pumps' report launched from EHPA's offices. The IEA's first report on heat pumps says the sector is at a tipping point and will be crucial in future.

EHPA advocacy

EHPA signs a joint letter calling for a faster phase-out of stand-alone fossil fuel boilers.

EHPA advocacy

EHPA signs a joint statement calling for EU Energy Labels to be reconfigured to show more clearly how efficient air to air heat pumps are compared to other heating and cooling technologies.

EHPA advocacy

EHPA communications

EHPA Twitter and LinkedIn accounts reach record numbers of followers.

December

Linixiaaroodo

The EU reaches a deal to introduce carbon price for heating and a fund to help vulnerable households with climate action to its 'Emissions Trading System' carbon market.

2. Policy and communications

Winning hearts and minds

"The EU has recognised heat pumps as crucial for energy security and climate action. Now the EU must walk the talk and push measures which tackle barriers to faster heat pumps rollout." One dark stormy night, there was a knock at the door... Telling a good story to the right people is crucial to getting our point across to the right audience. Not to mention reaching a 'happily ever after' ending."



Jozefien Vanbecelaere Head of EU affairs, EHPA



Sarah Azau Head of communications, EHPA



The REPowerEU plan – driving forward heat pumps



In February, Russia illegally invaded Ukraine, throwing the EU's reliance on gas imports into stark relief.

As a result, the European Commission published a plan to reduce our need for gas imports.

The 'REPowerEU' package, announced in March and published in May, contained ambitious measures to increase heat pumps. The EU wants to double heat pump sales by 2026. According to EHPA's calculations, this would mean 60 million additional heat pumps connected by 2030, on top of the 17 million of them already installed.

REPowerEU also contained other measures to support the roll-out of heat pumps. It refers to measures like ramping up equipment production for heat pumps, facilitating the sector's access to finance and focusing on education and training in a range of skills from plumbing to architects.

The Commission wants to change other rules that will help the targets be reached, like tougher energy efficiency requirements on buildings. These should see an end to 'stand-alone' fossil fuel boilers being put on the market as from 2029.

EHPA had met with EU energy commissioner Simson before the package was released, and inputted on some of these measures. However, while they are very good news, they are not enough to ensure the sector can meet the targets.

Accordingly, EHPA has started calling for an 'all hands on deck' approach, meaning that all measures and areas need to work towards these targets. EHPA calls this overall plan or umbrella initiative the 'heat pump accelerator'.

The association has been calling for it consistently this year, and pushing it through communications products, advocacy work and our events. The accelerator idea has been picked up. The European Commission is now working on a clean tech platform to strengthen European manufacturing in areas including heat pumps.



EU takes step towards a fairer playing field for heating

In December, MEPs and EU governments finally reached an agreement on the EU's carbon market, the Emissions Trading System (ETS). An ETS will be set up for buildings and road transport from 2027, meaning a price will be put on the CO2 emitted by fossil fuel heating.

EHPA has long supported such a carbon price, which is key to bringing the heating sector in line with the EU's 'polluter pays' principle and creating a more level playing field between fossil energy and heat pumps.

EHPA had been in close contact with the European Parliament's lead MEP on the file, had developed a clear position paper and engaged with other likeminded organisations to advocate for this step.

The EU institutions also agreed that governments will need to allocate all the revenues they receive from ETS auctioning to climate action. This should hugely boost investments in green technology such as heat pumps.

MEPs and the Council also agreed to create a Social Climate Fund (SCF) to support vulnerable households, micro-enterprises and transport worth €86.7 billion from 2026 to 2032.

This fund will be used to cushion the impacts of the new ETS agreement on vulnerable households by supporting investments in for example the decarbonisation of heating and cooling in buildings.

Getting Fit for 55% through heat pumps

Negotiations on other Fit for 55% files such as the renewable energy, energy efficiency and energy performance of building directives were ongoing in 2022. They will be finalised in 2023.

EHPA has been active on all relevant files. These are crucial for increasing energy efficiency in buildings and more generally, and for increasing renewables to achieve the EU's 55% reduction in greenhouse gas emissions by 2030.

EHPA has been advocating for elements to be included in these laws which help heat pumps. For example, an ambitious target for renewables in heating and cooling, for the energy efficiency first principle to be implemented in industry by increasing industrial heat pumps, for phasing out fossil fuel heating and subsidies for fossil fuel heating, and for having heat pumps well represented to achieve a zero emission building.





Fostering innovation and efficiency through ecodesign



The EU's ecodesign rules are of the highest importance to the heat pump industry. This is because they set requirements to be met directly by manufacturers. Good ecodesign rules ensure that inefficient and outdated technologies are kept out of the European market. This boosts innovation.

EHPA continued to work on improving the ecodesign framework and methodologies for heat pumps. It called for fossil fuel-only boilers to be phased out via ecodesign, and for various labels to be merged to that the efficiency of air to air heat pumps would become much more visible in comparison to other heating and cooling technologies. It also called for ecodesign methodologies to be further improved.

F-gas rules that support the REPowerEU targets

The EU has rules which ensure the phasing down of fluorinated gases, which if released can be highly damaging to the climate. Heat pumps contain a small amount of these gases in the form of refrigerants, but the heat pump sector supports the current phase-down and is gradually developing alternatives.

However in 2022, the European Commission made a new proposal which would ramp down the use of these gases much more steeply over the next years.

EHPA is advocating for the revised rules to take into account the new and vastly increased REPowerEU targets for heat pumps, the different types of heat pumps and their different applications and safety requirements and the time needed for product development.



The IEA's 'Future of Heat Pumps' report



In November, the International Energy Agency (IEA) published its first ever global report on heat pumps. This was highly significant as the IEA is a globally recognised and respected body. Their report, which EHPA had contributed to, places heat pumps firmly as a central solution for the energy transition.

The IEA asked EHPA to host the launch of their report in our offices in Brussels, which we were delighted to do.

The heat pump sector has many different audiences, from EU policy makers to consumers. Increasingly, they are all convinced of the importance of heat pumps in terms of energy independence, climate action, local jobs, tackling fuel poverty.

EHPA uses all the tools at its disposal to ensure our messages reach the right groups. Our newly revamped website, our updated brand and our lively social media presence on Youtube, LinkedIn and Twitter go hand in hand with classic media work and reports to explain and convince of our positions.

This year, we have particularly focused on visuals: the key policy ask of a heat pump accelerator is supported by several videos and an infographic and a social media campaign based on photos.

We also ensure flagship products and actions, like the release of the market report in the summer, and the Heat Pump Forum in September, are supported by press opportunities, images, and clear, persuasive, quotable and memorable messages.



Telling the right story

Gas crisis driving heat pump boom in Europe, IEA says

non | EURACTIV.com
1 Dec 2022 (updated: 5 Dec 2022)



Annual heat pump sales in Europe could rise to 7 million by 2030 – up from 2 million in 2021 – if go energy goals, the IEA report said. [I AM NIKOM / Shuttenstock] Languages: Deutsch

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Global heat pump sales surged by nearly 15% last year, led by the European Union, where energy security concerns caused by Russla's war in Ukraine are driving demand, according to a new report by the International Energy Agency (IEA).

The biggest growth rates were reported in the European Union, where heat pump sales rose by 35%, according to the IEA's special report on "The Future of Heat Pumps", published on Wednesday (30 November).

Heat pumps should be key to Truss's energy strategy, urges expert

Measures unlikely to include incentives for people to install devices, which cut bills and emissions



Two heat pumps at a training facility used by Octopus Energy in Sloug Neal/Getty Images

Heat pumps need to be at the heart of any <u>new energy strategy</u>, to keep Britain's homes warm and reduce greenhouse gas emissions, but so far there is little sign of the policy measures needed, one of the UK's leading heating experts has warned.

Heat pumps "indispensable" to cut emissions

30 NOV 2022



FRANCE: The International Energy Agency (IEA) has described heat pumps as le" in efforts to cut emissions and has urged policy makers worldwide to put their weight behind the technology

peaking at the launch, today, of its new report, *The Future of Heat Pumps*, IEA executive director Fatih Birol said Heat pumps are an indispensable part of any plan to cut emissions and natural gas use, and an urgent priority in

Media articles referring to EHPA

Rapid industrial electrification could avoid EU gas rationing

The European food, chemical and glass industries could evade shutdown orders in the coming months if they quickly electrify their production processes with heat pumps, according to a new report.

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U countries are diligently preparing plans for gas rationing in accordance with an EU regulation adopted in July. In these plans, governments are assigning their industries a degree of 'essentialness'. It is a challenging task necessitated by the <u>energy crisis</u>; in the event that dwindling gas supplies demand it, the European Commission has specified that industrial processes should be shut down first to protect household heating for as long as presented. possible

Invertek Drives joins EHPA





wern urrives has joined the European Heat Pump Association (EHPA) an with the association's secretary general. Thomas Nowak, at Chillvent ss Invertek's investment in in VFD technology to support the rapidly ing heat pump market.

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BSRIA

11 Aug 2022, 14:03 Hannah Naylor

Heat pump installations up 25% in Germany in first half 2022 while gas heating sales slump

#Business & Jobs #Heating

Handelsblatt

Deliveries of heat pumps are up 25 percent in the first half of this year compared with the same period last year, challenging the dominance of gas-fired heating system in German homes. Gas heatr sails efflapticularly stepty, by to percent, in the second quarter of 2022. – compared to the same period in 2021, figures from the Federal Association of German Heating Industry (BDH) analysed by the business daily landesblatt showed. The news outlet said this transition is politically pleasing: German Chancellor Old Scholz was recently seen fixing a screw into an almost-built beat pump during a visit to the production hall of German heating manufacturer Viessmann, as a sign of support.

ment Published: 07 September 2022

Heating up the global heat pump market

⊡, Duncan Gibb, Thomas N ak & Richard Lo

ature Energy 7, 901–904 (2022) Cite this article

9848 Accesses | 3 Citations | 448 Altmetric | Metrics

Heat pumps are widely recognized as a key clean energy technology in the energy transition. While the global heat pump market has expanded significantly, more than doubling in some countries in a single year, expanded policy support will be needed to build confidence in the technology and meet climate goals.

3. Events

Bringing the heat pump community together

"EHPA's events are the meeting place for the European heat pump sector. Bringing experts together, they offer a hive of information and networking opportunities."



Savina Cenuse Head of members and events, EHPA





EHPA organises a wide range of events. Taking place throughout the year, they address the organisation's policy priorities, such as a heat pump accelerator in the context of REPowerEU.

They also look into different types and uses of heat pumps - residential, commercial, industrial applications of heat pumps - and market data.

They help to highlight the economic, social, technological and environmental factors that can speed up market deployment and help Europeans gain independence from fossil gas faster.

Online events help build towards EHPA's main events, which are:

- Decarb Cities hosted by a city, this event is a bridge between the European and local levels;
- Heat Pump Forum the annual thought-leadership and networking platform in Brussels. In 2022 the Forum addressed the topic of the heat pump accelerator in the context of REPowerEU;
- High temperature heat pump symposium taking place every two years, this event addresses industry demand for decarbonisation.

EHPA strengthens its messages by being present at external events such as ISH, the trade fair for sanitation, heating and air; Chillventa, the trade fair for refrigeration technology, the Heat Pump summit, and trade fair Mostra Convegno Expocomfort.







Decarb Cities Source: Alexey Lando









Heat Pump Forum Source: Vivian Hertz



Launch of IEA heat pump report Source: Sarah Azau

4. Heat Pump KEYMARK certification

Ensuring peace of mind through certification

"It is crucial that end-users have peace of mind on the reliability of their heat pump. The KEYMARK Scheme and Quality Label offer exactly that: helping heat pump manufacturers demonstrate certified equipment sustained quality and performance."



Tarik Bellahcene Head of Heat Pump KEYMARK Secretariat, EHPA





The Heat Pump KEYMARK is a voluntary third-party certification mark that supports the quality and performance of heat pumps on the European market. It can be applied to all heat pumps, combination heat pumps and hot water heaters.

The Heat Pump KEYMARK scheme is owned by CEN, the European Committee for Standardization and its secretariat is coordinated by EHPA. The certificate is granted by independent Certification Bodies and the testing is carried out by registered Testing Laboratories. The scheme is now recognised in 10 European countries and counts over 6,000 certified models.

In 2022, the relevance of the certification scheme grew more than ever, with the highest number of new certificates since launch of the scheme! This is because heat pumps are an increasingly recognised way to face energy market pressure and decarbonisation efforts

1,300 Heat Pump KEYMARK certificates have now been awarded in total, to 90 certificate holder companies. In the last quarter of 2022, three new testing laboratories became qualified and joined the scheme.

What's more, Heat Pump KEYMARK was formally recognised in the Netherlands as a valid reference for local market subsidies schemes in 2022, meaning it's now used in 10 European countries.

The scheme is attractive outside Europe as well, with interest growing mainly in Asia from both the manufacturing and the Testing, Inspection and Certification sectors.

The heat pump KEYMARK scheme was present at refrigeration trade fair Chillventa in October 2022, which took place in Germany. A very well attended workshop was organised and presented by Tarik Bellahcene, head of the Heat Pump KEYMARK secretariat.

Finally and importantly, Heat Pump KEYMARK got increasing traction on social media. It now has nearly 300 Twitter followers who are mainly experts from the sector, and well over 700 on LinkedIn.

Back in March, EHPA coordinated and carried out a joint social media campaign with the support of KMO (KEYMARK Management Organization), the Heat Pump KEYMARK, Solar KEYMARK and Insulation KEYMARK. The campaign included the release of videos presenting the scheme with the headline: 'Quality is a choice. Choose KEYMARK'. This initiative gathered over 6,000 impressions within a month, a record-breaking number for the certification scheme.

EHPA also developed and runs the Quality Label, a programme which aims to assure the end consumer of the quality of a heat pump unit or model range on the market. The Quality Label operates on a national level and is currently referred in 13 European countries.

In 2022, steps were taken to reinforce the way the Heat Pump KEYMARK and EHPA Quality Labels interact and complement each other. These include a plan to set up a working group to address and clarify issues which may occur when applying to Quality Label with KEYMARK certificates as a reference, linking the two databases, and encouraging members of both schemes to participate in meetings throughout the year.

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5. Projects

Pushing forward the sector's know-how

"EU projects offer the chance to be involved in cutting edge research. By getting involved, organisations help push the bounds of what heat pumps can do, opening up future business and commercial opportunities."



Dan Stefanica Head of EU Projects, EHPA



The EHPA projects portfolio went from strength to strength in 2022!

Six new project applications were successful and have already begun or will do so later this year.

These cover innovative high temperature heat pumps, state of the art thermal storage, policy, and industrial strategy and financing.

This brought our current projects to a total of ten by the start of 2023, with almost 30 projects related events planned.

Our most popular project has now been running for 12 years. The Heat Pump Award rewards different types of heat pump projects, and allow winners to show real examples and the impact they have had.

There is now a new Heat Pump Awards category: the People's Choice award, whose lucky winner is selected through a public vote. In 2022, 51 different heat pump projects were submitted for this category, and 6,569 votes were cast!

The Heat Pump Award winners' projects get extra visibility through a special webinar, 'Projects promoting heat pump excellence: HPAward winners'.

This year, there are 24 relevant calls for heat pumps as part of the EU's research funding pot, Horizon Europe Programme in 2023, with more to become available: more information by contacting Dan Stefanica: dan.stefanica@ehpa.org

EHPA's Research and Innovation Committee, which brings together over 120 EHPA members who are interested in or involved in research, met three times in 2022. It will continue to meet regularly in 2023.

Joining forces

However strong we are, it's always more powerful to be united. This is one reason why EHPA would be nothing without the breadth and strength of its members. It's also why we in 2022 joined together with the European Climate Foundation, the European Copper Institute, Solar Power Europe, Euroheat and Power, and the European Partnership for Energy and the Environment to launch an all-new campaign: Clean Heat Europe.

The aim of the campaign is for EU decision-makers to ultimately consider how all policies and measures contribute to the decarbonisation of the heating and cooling sector in Europe.

After several months of preparation and message building with a PR agency, the campaign went live in September. The first step was to build up the social media presence of the campaign on LinkedIn and Twitter, which worked well. In 2023, a basic campaign website will be launched and a policy report based on new research is planned.

More: https://twitter.com/cleanheateurope





6. Market data

Measuring the market

"You can only manage what you can measure, and that's why EHPA's market report and statistics have become such a valuable tool in a growing industry, requested by stakeholders from policy, research, manufacturing and financing."



Thomas Nowak Secretary general, EHPA



Every year, EHPA gathers sales data from member associations in 21 European countries and publishes a comprehensive and detailed market report.



We presented the 2021 figures in summer 2022 via a webinar with the International Renewable Energy Agency and to media. They showed that heat pump sales grew by 34% in Europe – an all-time high - with 2.18 million heat pump units sold in 21 countries*. This was nearly 560,000 more than in 2020 and brings the total number of installed heat pumps in the EU to 16.98 million, covering around 14% of the heating market**.

The heat pumps installed in the EU by the end of 2021 avoided over 44 million tonnes of CO_2 – slightly more than the annual emissions of Ireland – with the heating sector producing around 1000 Mt overall.

In terms of the process, data collection times were shortened in 2022 and quarterly data are now collected including a quarter to quarter comparison to identify trends earlier.

EHPA also offers members and EU decision-makers access to an interactive dashboard, so they can pick and choose what they focus on and compare. In 2022, the tool was given a revamp. It shows how heat pumps contribute to Europe's energy and climate targets.

Supporting our members

As of the end of 2022, EHPA had 170 members! Hailing from well over 25 countries, our members cover all different parts of the sector, from manufacturing to research.

EHPA offers its members a range of benefits: when you join, you will receive our weekly newsletter which brings together the latest information you need.

Members can become part of our committees and task forces and help shape our work and positions.

There is an in-depth members' only section of our website, which offers summaries of all the policy files we work on and a weekly policy Q&A session with our team.

Members also have exclusive access to our market report – which collects data from over 22 countries and presents the status of the markets and the trends.

To drill down even further into the data, EHPA members have access to our statistics tool where you can select and present it as you wish.

Members are also our first priority for speaking slots at webinars and our events, and of course all members can always benefits from sponsorship opportunities.

More on EHPA membership: www.ehpa.org/about-ehpa/join-us/



* The 21 countries covered are Austria, Belgium, Switzerland, the Czech Republic, Germany, Denmark, Estonia, Spain, Finland, France, Hungary, Ireland, Italy, Lithuania, the Netherlands, Norway, Poland, Portugal, Sweden, Slovakia and the UK.

** Based on the assumption of 150 to 120 million residential and office buildings in the EU.

EHPA board

EHPA's current Board was elected in June 2022 and will be in place for two years. Its members are:



Andrea Voigt Danfoss



Barbara Priesching Vaillant



Dina Köpke Emerson



Enrique Vilamitjana Panasonic



Hauke Hagen Stiebel-Eltron



Johannes Brugmann Bosch





Jussi Hirvonen SULPU



Luc de Torquat Groupe Atlantic



Malgorzata Smuczynska Port PC



Rolf Iver Hagemoen Norwegian Heat Pump Association



Marek Miara Fraunhofer ISE



Rowena Rodrigues Glen Dimplex



Martin Forsén Nibe



Patrick Crombez Daikin



Thomas Fleckl AIT

EHPA governance



EHPA staff



Thomas Nowak Secretary general

Projects



Dan Stefanica Head of EU projects



Irene Egea Saiz EU Projects manager



Elena Ricci EU projects officer



Sonia Bianconi EU projects officer



Francesca Tamburrini EU projects officer

Administration & HR



Ana Pérez Quimbiulco Operations officer



Paula Antón Vergara HR officer and executive assistant

Policy



Jozefien Vanbecelaere Head of EU affairs



Mélanie Auvray Senior EU affairs advisor



Alessia del Vasto EU affairs advisor



Gutiérrez Román Junior EU affairs officer

Heat Pump KEYMARK Certification



Tarik Bellahcene Head of HP KEYMARK secretariat



Danaé Kokkalis KEYMARK communication officer

Communication



Sarah Azau Head of communications



Danaé Kokkalis Communications officer



Daniela Floris Communications officer



Milagros García Communications assistant

Membership & Events



Savina Cenuse Head of membership & events



Paula Acero Miras Membership and events officer

European Heat Pump Association: Annual report 2022 27



The **European Heat Pump Association (EHPA)** represents the European heat pump sector. Our over 180 members include heat pump and component manufacturers, research institutes, universities, testing labs and energy agencies.

EHPA advocates, communicates and provides policy, technical and economic expertise to European, national and local authorities, and to our members.

We organise high level events and manage or partner in multiple projects.

We work to shape EU policy that allows the heat pump sector to flourish, and to become the number one heating and cooling choice by 2030. Heat pumps will be a central part of a renewable, sustainable and smart energy system in a future decarbonised Europe.

Rue d'Arlon 63-67
 1000 Brussels - Belgium
 +32 2 400 10 17
 info@ehpa.org





@helloheatpumps

European Heat Pump Association



www.ehpa.org