



Competitiveness of the heat pump sector in Europe

Nearly half of the European Union's (EU) energy consumption is used for heating and cooling. Of this, over 70% is still from fossil fuels, which are mainly imported. Heat pumps are a clean and cost-efficient alternative for heating, cooling, and producing hot water, significantly reducing energy use and emissions compared to traditional heating systems and avoiding energy imports. Recognised as a key clean tech industry in the European Commission's Net-Zero Industry Act (NZIA), heat pumps not only contribute to climate and energy targets but also increase Europe's economic resilience and competitiveness. To unlock their full potential, EU policymakers must prioritise the development of supportive policies and financial frameworks.

Background – heat pump sector evolution

The heat pump sector in Europe has experienced robust growth over the past decade, marked by continuous double-digit expansion. In 2022 alone, sales numbers surged by 38%, with over 3 million units sold- of which roughly 1.2 million air/water and 1.5 million air/air units. This resulted in over 28 GW of installed capacity, displacing approximately 4 bcm of gas and slashing CO2 emissions by 8 Mt.

However, this non-stop growth saw a **setback in 2023**. Recent data collected by the European Heat Pump Association (EHPA)¹ show that heat pump sales in **21 European countries**² were **6.5% lower** than the previous year – the first fall after ten years of annual growth. This drop in sales is already

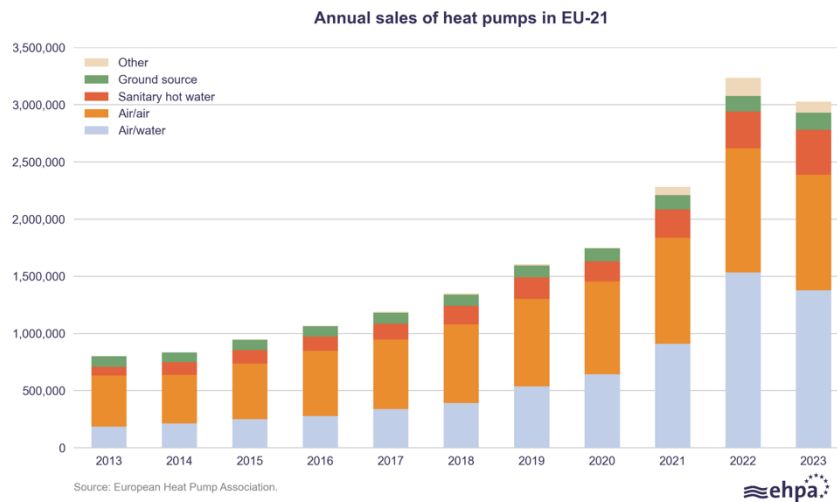


Figure 1: EHPA – Heat pump sales fell in 2023 after ten years of growth

forcing manufacturers to cut or reduce jobs – the changes announced so far will impact nearly 3,000 employees and review their announced investment plans.

France, Italy, Sweden, Finland, Poland, Denmark, Austria and Switzerland all saw heat pump sales drop last year. While they increased in Portugal, Belgium, Norway, the Netherlands, Spain and Germany this was not enough to offset the overall decrease. What’s more, even in many countries that saw overall growth, **quarterly sales declined towards the end of 2023**. Heat pump manufacturers see an even worsening trend in 2024.

This drop is part of an alarming trend that puts reaching Europe’s decarbonisation targets at risk and that requires urgent action and political support. The targets at risk include the 2030 target of 49 percent renewables in heating and the 60 million installed heat pumps necessary by 2030 to get on track for the EU’s 2050 net-zero target, as included in the latest European Commission PRIMES study on energy modelling for the 2040 targets³. In fact, with current annual sales levels (3 million a year), around 45 million heat pumps would be installed by 2030 – **about 25% short of the EU’s aims**. This is the equivalent of five years of heat pump sales at current rates. The EU would miss out on potential investments and net zero industry growth. It would also be a missed opportunity to avoid emissions of about 70 Mt of CO2, roughly the annual CO2 output of Romania⁴.

¹ “EU could end up 15 million heat pumps short of 2030 ambition”, *European Heat Pump Association*, July 2024, <https://www.ehpa.org/news-and-resources/news/eu-could-end-up-15-million-heat-pumps-short-of-2030-ambition/>

² The 21 countries are 18 EU members, plus Norway, Switzerland and the UK.

³ European Commission PRIMES energy modelling for 2040 targets, https://climate.ec.europa.eu/eu-action/climate-strategies-targets/2040-climate-target_en

⁴ EU could end up 15 million heat pumps short of 2030 ambition”, *European Heat Pump Association*, July 2024, <https://www.ehpa.org/news-and-resources/news/eu-could-end-up-15-million-heat-pumps-short-of-2030-ambition/>

Current growth of heat pump stock will miss European ambition by five years

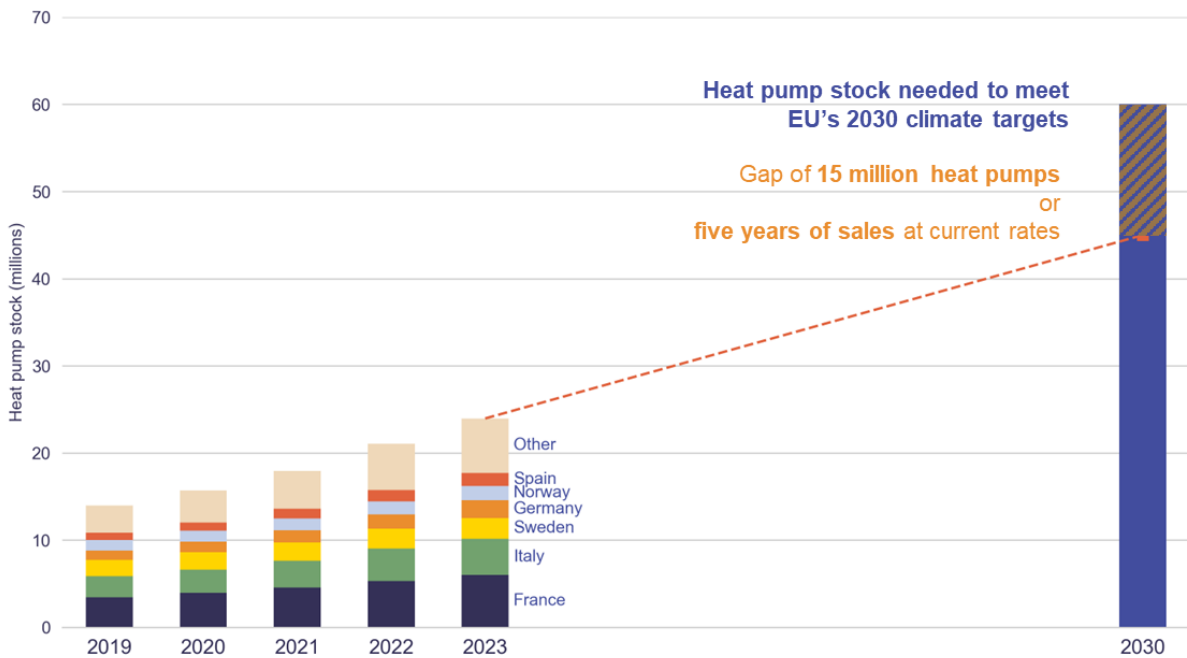


Figure 2: EHPA – Current growth of heat pump stock will miss European ambition by five years

Value chain of heat pumps in Europe

Although the decline in sales has brought uncertainty into the EU's heat pump sector, the European Union remains the sole global region where manufacturers have been announcing significant expansion plans, with over 30 GW of manufacturing capacity anticipated to become operational within this decade⁵.

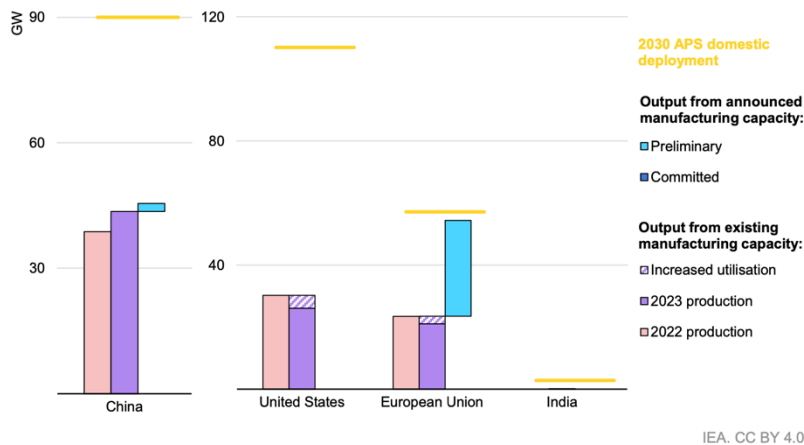


Figure 3: IEA, Output from existing and announced heat pump manufacturing capacity in selected regions relative to Announced Pledges Scenario deployment in 2030

Heat pump manufacturing capacity can usually be scaled up quickly to meet rising demand by increasing the use of current production lines, adding new ones, or building new manufacturing facilities

⁵ “Advancing Clean Technology Manufacturing: An Energy Technology Perspectives Special Report”, International Energy Agency, <https://iea.blob.core.windows.net/assets/7e7f4b17-1bb2-48e4-8a92-fb9355b1d1bd/CleanTechnologyManufacturingRoadmap.pdf>

altogether. Any policies designed to support an expansion in heat pump manufacturing should therefore prioritise **action to stimulate sustained market demand**⁶.

The heat pump industry in Europe, made up predominantly by SMEs, operates in production facilities in over **250 locations** across the continent. These facilities, often situated in remote areas, play a vital role in **providing employment** and **economic opportunities** to local communities.

Europe also hosts a network of 25 well reputed universities and research institutions dedicated to advancing refrigerant cycle-based solutions and integrating them with the electric grid across various applications⁷.

The heat pump sector must grow steadily throughout the rest of this decade. This is essential to help **decarbonise the heating sector in residential, commercial, and industrial applications**, as well as to **decarbonise district energy grids and confirm the EU's place on industrial leadership for clean technologies**. In order to achieve 60 million installed heat pumps by 2030 in the EU⁸, an average annual growth rate of approximately 17% is needed. Achieving this will also massively reduce Europe's dependency on (Russian) fossil gas and hence contribute to meeting the targets of REPowerEU.

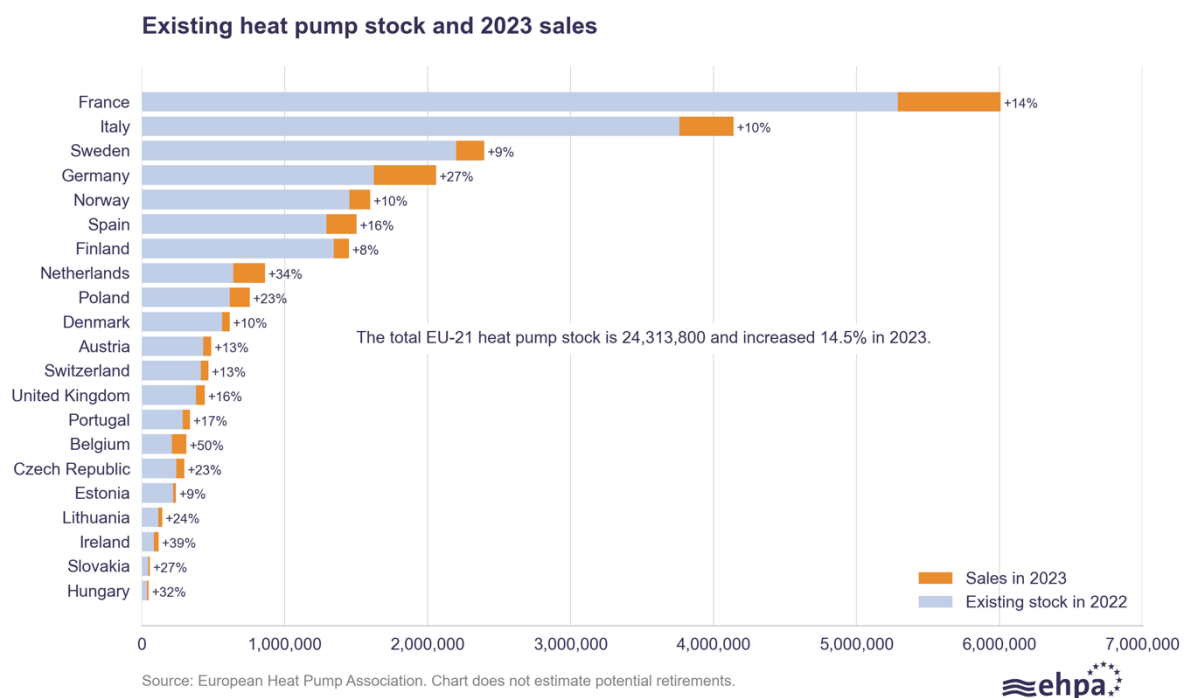


Figure 4: EHPA – Heat pump stock by country and 2023 sales

Building a strong heat pump and heat pump component industry in Europe is key to capturing this expanding market. The heat pump industry in Europe needs a **strong policy framework** to operate at capacity. The political uncertainty puts at risk the €7 billion of investments⁹ the sector was planning in

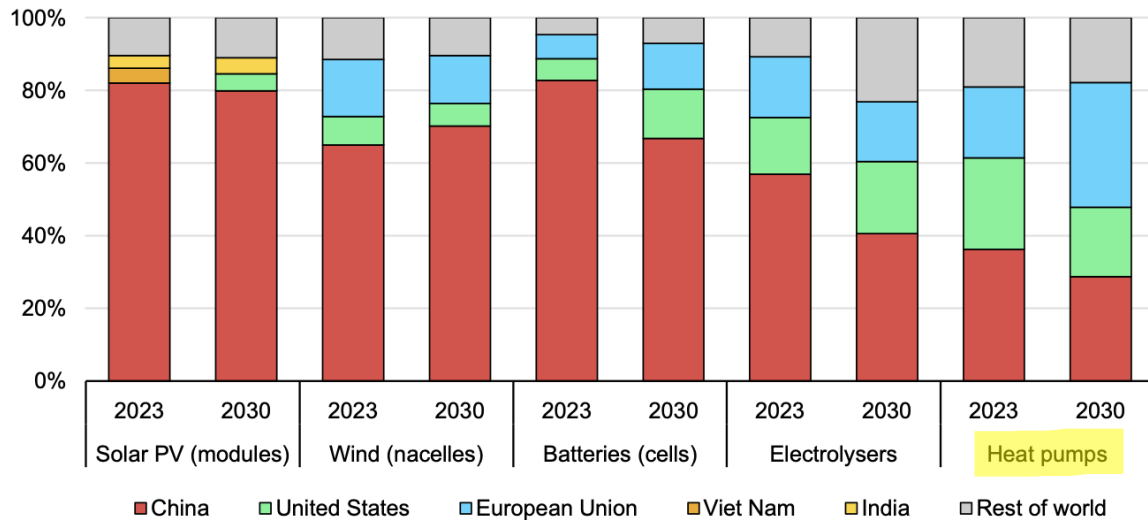
⁶Ibid.

⁷ European Heat Pump Association, <https://pages-ehpa.symantra.be/#/members-directory>

⁸ European Commission PRIMES energy modelling for 2040 targets, https://climate.ec.europa.eu/eu-action/climate-strategies-targets/2040-climate-target_en

⁹ “Heat pump manufacturers plan investments worth 7 billion euros”, *European Heat Pump Association*, <https://www.ehpa.org/news-and-resources/publications/heat-pump-manufacturers-plan-investments-worth-e7-billion/>

Europe for 2022-2025. These investments would make the share of manufacturing in the EU grow the most compared to other parts of the world¹⁰.



IEA CC BY 4.0

Figure 5: IEA – Geographical concentration of current and announced manufacturing capacity, 2023-2030

The heat pump sector in Europe is a key one in terms of innovation and efficiency, characterised by several key strengths that consolidate its position as a key player in the global market:

- First of all, manufacturers in Europe have a significant share of the market. The European Commission has estimated that between 60% and 73% of heat pumps installed in Europe are produced in Europe¹¹. A high market share underscores the sector's ability to compete effectively on a global scale, showcasing its skills in technological advancement of heat pumps.
- Secondly, the heat pump sector in Europe benefits from **efficient manufacturing practices**, characterised by the use of relatively common raw materials and straightforward assembly processes¹². This ensures energy and resource consumption, processes, and labour costs are optimised, further enhancing the sector's competitiveness. With a high degree of component commonality with other technologies, such as semi-conductors and fans, and a typical product lifetime of 17 years¹³, supply chain risks are minimal. This longevity not only ensures product reliability but also contributes to sustainability efforts by reducing waste and resource consumption.
- Thirdly, **manufacturing sites are dispersed across several Member States – around 20¹⁴** – comprising a mix of EU headquarters and local subsidiaries, ensuring job creation in urban as well as rural areas.

¹⁰ "Advancing Clean Technology Manufacturing: An Energy Technology Perspectives Special Report", *International Energy Agency*, <https://iea.blob.core.windows.net/assets/7e7f4b17-1bb2-48e4-8a92-fb9355b1d1bd/CleanTechnologyManufacturingRoadmap.pdf>

¹¹ European Commission Staff Working Document, https://single-market-economy.ec.europa.eu/system/files/2023-03/SWD_2023_68_F1_STAFF_WORKING_PAPER_EN_V4_P1_2629849.PDF

¹² "Clean Energy Technology Observatory: Heat pumps in the European Union – 2023 Status Report on Technology Development, trends, value chains and markets", *Joint Research Center*, 2023, <https://publications.jrc.ec.europa.eu/repository/handle/JRC134991>

¹³ Ibid.

¹⁴ "Driving competitive clean tech in Europe", *European Heat Pump Association*, <https://www.ehpa.org/news-and-resources/news/driving-competitive-clean-tech-in-europe/>

- Moreover, the sector boasts a **mature technological landscape**, with a Technology Readiness Level (TRL) of 9¹⁵. This eliminates the need for immediate and breakthrough innovations. Instead, the focus of the sector lies on technological advancements in areas such as cost efficiency, size optimisation, noise reduction, refrigerant technologies, and easier installation processes.
- Additionally, a **favourable regulatory framework** under the Green Deal and the Fit-for-55 package has put renewables and the reduction of greenhouse gas emissions at the forefront of the political agenda. The recast of EU laws such as the Renewable Energy Directive¹⁶, the Energy Efficiency Directive¹⁷ and the Energy Performance of Buildings Directive¹⁸ have set ambitious targets for member states to increase the share of renewable energy in their national mix, improve energy efficiency, and start on renovation to decarbonise the EU building stock. The new ETS2 and its introduction of the ‘cap & trade’ system in heating, will further incentivize the switch to heat pumps. This regulatory framework has provided a supportive environment for the heat pump sector, and the revised laws now need to be correctly and swiftly implemented in all Member States. If the policies are not properly implemented, this would cause an uncertain framework and balance for the industry.

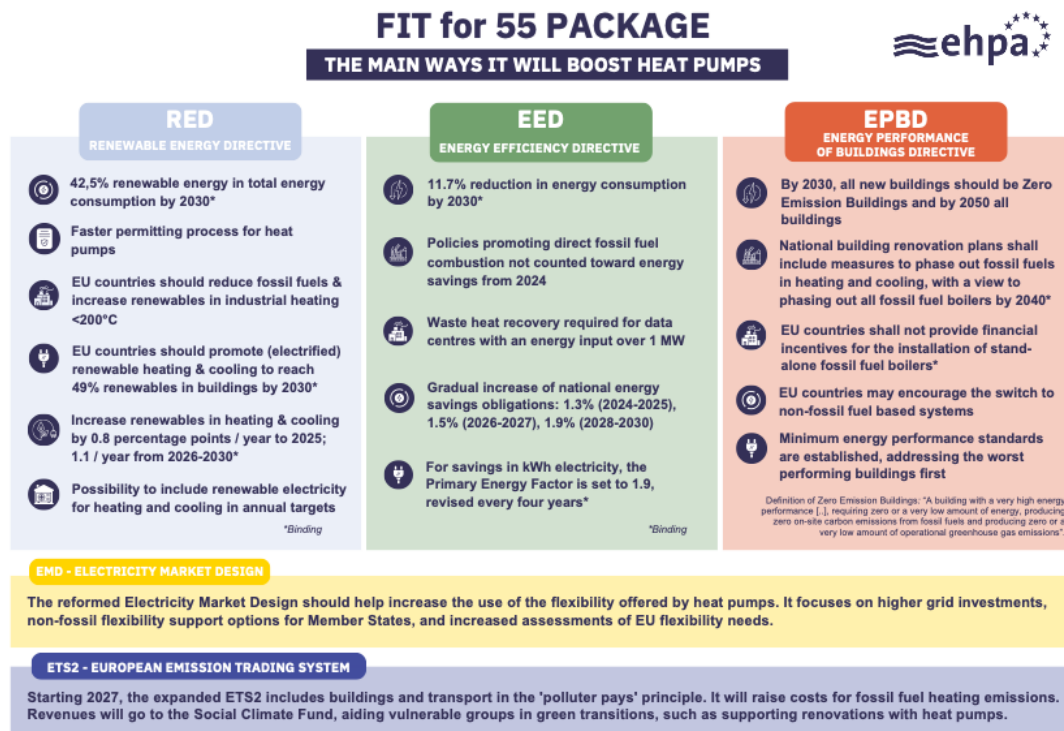


Figure 6: EHPA – Infographic Fit for 55 package

¹⁵ Ibid.

¹⁶ Directive (EU) 2023/2413, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023L2413&qid=1699364355105>

¹⁷ Directive (EU) 2023/1791, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ%3AJOL_2023_231_R_0001&qid=1695186598766

¹⁸ Directive (EU) 2024/1275, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202401275&pk_keyword=Energy&pk_content=Directive

Lastly, renovation and construction activities within the sector are **highly localised**, providing strategic advantages in terms of market penetration and customer engagement. This fosters closer ties with local communities and allows companies to follow and adapt to the local market more easily.

Is the competitiveness of the heat pump sector under threat?

The decline in heat pump sales in Europe in 2023 is due to a combination of factors that have affected investors and consumers, resulting in a notable 5% decline after a decade of continuous growth:

- A major contributor to this decline is the **shift in energy prices**. After the very high gas prices following the Russian invasion in Ukraine in 2022, the gas prices dropped again in 2023¹⁹, making electric heat pumps less financially attractive, especially in light of high electricity prices that persist.
- The European economy has stagnated since the summer of 2022, with factors such as persistently high inflation, weak consumer demand, and tightening monetary policy contributing to the slowdown. Despite efforts to stimulate sectors such as tourism and manufacturing, GDP growth has stalled²⁰. In this context of **high interest rates, inflation, and overall economic uncertainty**, investment in construction and renovation projects has been discouraged, impacting demand for heat pumps.
- Political debates have added to the uncertainty surrounding investment in heat pumps. The **backlash against green policies**, coupled with reduced ambition at both EU and national level, has further dampened confidence in the market. Uncertainty about subsidy schemes in some countries has also contributed to the decline in sales.

Market dynamics are closely linked to the political landscape. In 2022, there was a spike in heat pump sales following the energy crisis triggered by Russia's invasion of Ukraine. At the time, the European Commission highlighted heat pumps as an important tool to reduce dependence on Russian fossil fuels and mitigate high gas prices within the REPowerEU Plan²¹, which boosted confidence in the market. However, the European Commission's **postponement of the Heat Pump Action Plan**²², along with similar shifts at the national level, has created further uncertainty and contributed to the decline in sales.

Nonetheless, it is important to note that sales of both condensing and non-condensing gas boilers dropped by around 12% in 2023²³. Notably, the installation ratio of stand-alone gas boilers to hydronic heat pumps (including air to water, ground source and hybrid heat pumps) shifted significantly, from 14.2 boilers to one heat pump in 2017, to 3.2 boilers to one heat pump in 2023²⁴. This shows that the market is moving to lower carbon technologies - but not fast enough.

¹⁹ Statista - the Statistics Portal." *Statista*,

<https://www.statista.com/markets/408/topic/436/energy/#overview>

²⁰ Rozkrut, Marek, and Maciej Stefański. "EY European Economic Outlook – October 2023." *Ernst & Young*, 26 Oct. 2023, https://www.ey.com/en_pl/economic-analysis-team/ey-european-economic-outlook-october-2023

²¹ Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions on the REPowerEU Plan, 18 May 2022, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2022%3A230%3AFIN&qid=1653033742483>

²² EU Commission Slams Brakes on Heat Pump Action Plan." *European Heat Pump Association*, 20 Dec. 2023, <https://www.ehpa.org/news-and-resources/press-releases/the-european-commission-has-postponed-its-heat-pump-action-plan-until-after-the-eu-elections-the-decision-comes-despite-the-commissions-repeated-assurances-that-the-action-plan-would-be-out/>

²³ Data from France, Italy, Germany, UK, Netherlands, Belgium, Poland, and Spain. Source: "Heat in Europe: 2023 Market Highlights and Predictions for 2024." *LCP Delta*, 6 Dec. 2023, <https://delta.lcp.com/webinars/heat-in-europe-2023-market-highlights-and-predictions-for-2024/>

²⁴ Ibid

Stable policy support is essential to speed up the transition and revitalise the market. Measures such as making **electricity prices maximum double the price of gas** – by shifting taxes and levies off the electricity bill, can increase the financial attractiveness of heat pumps, drive end-user demand, and accelerate the decarbonisation of the heating and cooling sector. By addressing these challenges and providing a supportive policy framework, the EU can promote greater energy independence and drive sustainable growth in the heat pump market.

Measures to strengthen heat pump sector competitiveness in Europe

In order to ensure the competitiveness of the heat pump sector, stable **demand is needed**. Manufacturers confirm that when demand is high, they are willing to invest in Europe. This is shown by the €7 billion of planned investments from 2022 to 2025 linked to the significant increase in heat pump manufacturing and deployment foreseen by REPowerEU²⁵. To foster increased demand and ensure the competitiveness of the European heat pump sector, several elements are essential:

- **Securing long-term and consistent policy framework**

Implementing long-term, stable, and predictable policies and incentives is paramount. These policies should empower end-users to boost their confidence in the long-term viability of their investment in a clean technology, like heat pumps, while encouraging the industry to invest in efficient production equipment and skilled workforces. The swift implementation of the Fit for 55 framework and a socially just introduction of the new ETS2 for heating and transport fuels is paramount to provide stability for consumers and manufacturers.

It is essential that the policy framework is clear, consistent, and supporting the sector and its achievements. The recent revision of the F-gas regulation, alongside the pending Ecodesign revision of Lot 1 and Lot 2 (water and space heaters), highlights a critical oversight in policy coordination. The F-gas Regulation has been finalized and approved without the finalization of the Ecodesign requirements, which will impose additional standards on heat pumps. As a result, manufacturers face the potential need to redesign and retest their products twice: first to comply with the newly approved F-gas regulation, and later to meet the forthcoming Ecodesign requirements. This disjointed approach not only increases the **regulatory burden** on manufacturers but also leads to increased costs that could have been mitigated by a more **synchronized regulatory process**. Ensuring that these significant regulatory changes are discussed and implemented in coordination would better support the industry's transition to sustainable practices while minimizing unnecessary disruptions.

- **Improving the electricity to gas price ratio**

The taxes and levies applied to energy should be addressed to reduce the price of electricity for end users. In 2022 gas prices were high, making electric heat pumps a more financially worthwhile investment. With the price of fossil gas coming down, and electricity often carrying a tax burden, electricity prices are sometimes as much as four times those of gas. Bringing stable policy support and ensuring electricity is around twice the price of gas – for example through a carbon price and tax breaks - are crucial to turn “the cost of heat pumps” into an investment that enables continuous savings on heating and cooling. This will trigger end-user demand and bring about the installation of more heat pumps, which will help decarbonise the heating and cooling sector and support greater EU energy independence.

²⁵ “Heat pump manufacturers plan investments worth €7 billion”, *European Heat Pump Association*, <https://www.ehpa.org/news-and-resources/publications/heat-pump-manufacturers-plan-investments-worth-e7-billion/>

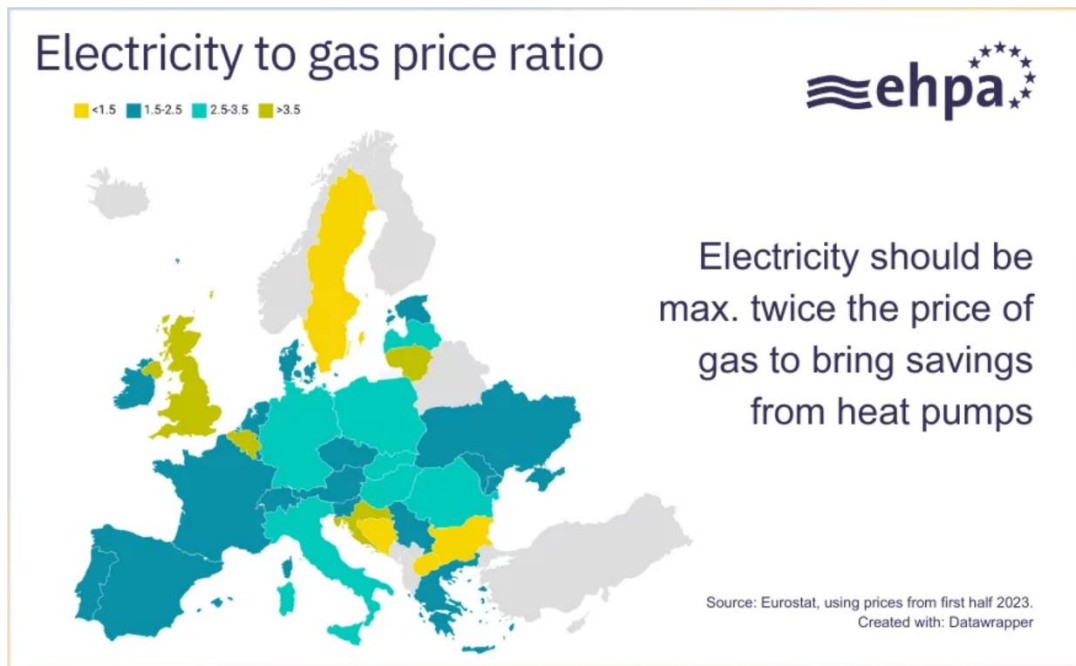


Figure 7: EHPA – electricity to gas price ratio (2023 figures from Eurostat)

- **Reducing production costs in EU**

To bring down production costs, the following approaches can be taken:

- verticalization of manufacturing processes and higher level of automation;
- sub-regional standardisation of design, performance and footprint;
- ensuring electricity is fairly taxed compared to gas;
- ensuring there is a sufficient workforce in place in all parts of the chain.

- **Centralised collection of Market Data**

Establishing a centralized system for the collection and upkeep of market data is essential for monitoring installations and market trends at regional, national, and subregional levels and imports and exports.

- **Preventing re-location**

The EU set up a fund of around €723.8 billion - the 'Recovery and Resilience Facility' - to help member states reboot their economies after the Covid-19 pandemic. In the same spirit, the EU could establish Resilience and Recovery Facility-like funds directed towards Member States, specifically targeting industrial needs such as heat pump manufacturing. Unlike the Net-Zero Industry Act (NZIA), which lacks associated financing and is not technology specific, funds aimed at the heat pump industry could address pertinent issues more effectively.

- **Investing in skills and communication campaigns**

Actions to enhance skills, including reskilling and upskilling the current workforce, are crucial. Additionally, comprehensive communication campaigns showcasing the benefits of a career in clean heating are necessary to raise awareness among end-users.

Box 1. Measures to strengthen heat pump competitiveness in Europe – the French example.

France's [Loi Industrie Verte](#)", enacted in October 2023 key provisions include:

- **Tax Credit Incentives:** The 2024 budget introduces the Green Industry Investment Tax Credit (C3IV) for projects in solar, wind, batteries, and heat pumps, encouraging investment in green technologies and rewards businesses for contributing to the transition towards renewable energy solutions
- **Revision of Requirements:** Streamlines entry into the market for heat pump manufacturers by reducing administrative barriers and aligning standards with industry needs.
- **Support for R&D:** the law includes measures to support R&D projects related to heat pumps and other clean technologies, through targeted funding.
- **Expanded Subsidies:** Increases financial support for companies producing heat pumps and other clean technologies to encourage investment in green manufacturing processes.

Conclusion

In conclusion, the competitiveness of the European heat pump sector stands as a testament to its achievements, yet the risk posed by recent challenges should be seen as a call to action. The sector has demonstrated robust growth, innovation, and a commitment to sustainability, positioning itself as a leader in the global market²⁶. With sales numbers soaring for a decade and significant contributions to energy savings and emissions reduction, the heat pump industry in Europe plays a crucial role in advancing Europe's energy security and climate goals.

However, recent data indicating a decline in sales pose a threat to the sector's continued success and its contribution to Europe's decarbonisation targets. Ambiguous policy frameworks, changing market dynamics, and external factors such as fluctuating fossil gas prices have contributed to this downturn. There is therefore a need for measures to bolster competitiveness and **stimulate demand**.

To address these challenges, a comprehensive approach is required. Long-term policy stability, like the publication of the Heat Pump Action Plan by the European Commission, improvements in the electricity-to-gas price ratio, investments in skills and communication campaigns, and ensuring fair competition and standardisation are essential strategies. Additionally, reducing production costs, centralised collection of market data, facilitating access to loans and subsidies, and promoting EU-made products are crucial steps to strengthen the sector's competitiveness.

National measures, such as France's "Loi Industrie Verte," provide valuable insights into policy interventions aimed at supporting green industries like heat pumps. By implementing targeted incentives, streamlining regulatory requirements, supporting research and development, and expanding subsidies, countries can foster an environment that **drives industry growth and job creation**.

In essence, sustaining and enhancing the competitiveness of the heat pump sector in Europe requires a concerted effort from policymakers, industry stakeholders, and consumers alike. By working collaboratively to address existing challenges and seize emerging opportunities, we can ensure the continued success and resilience of this vital sector while advancing Europe's transition to a sustainable and low-carbon future.

²⁶ "The State of Clean Technology Manufacturing - An Energy Technology Perspectives Special Briefing", *International Energy Agency*, <https://iea.blob.core.windows.net/assets/0a421001-6157-436d-893c-c37eeab54967/TheStateofCleanTechnologyManufacturing.pdf>

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The European Heat Pump Association (EHPA) represents the European heat pump sector. Our over 170 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.