2025
European heat pump market report

The **European Heat Pump Association** (EHPA) represents the European heat pump sector.

EHPA works to shape EU policy that allows heat pumps to become the number one heating and cooling choice by 2030 and a key part of a future decarbonised Europe.

EHPA advocates and communicates to policy-makers and to our members. EHPA organises high level events and is involved in multiple projects.

EHPA coordinates the Heat Pump KEYMARK - a European certification scheme.

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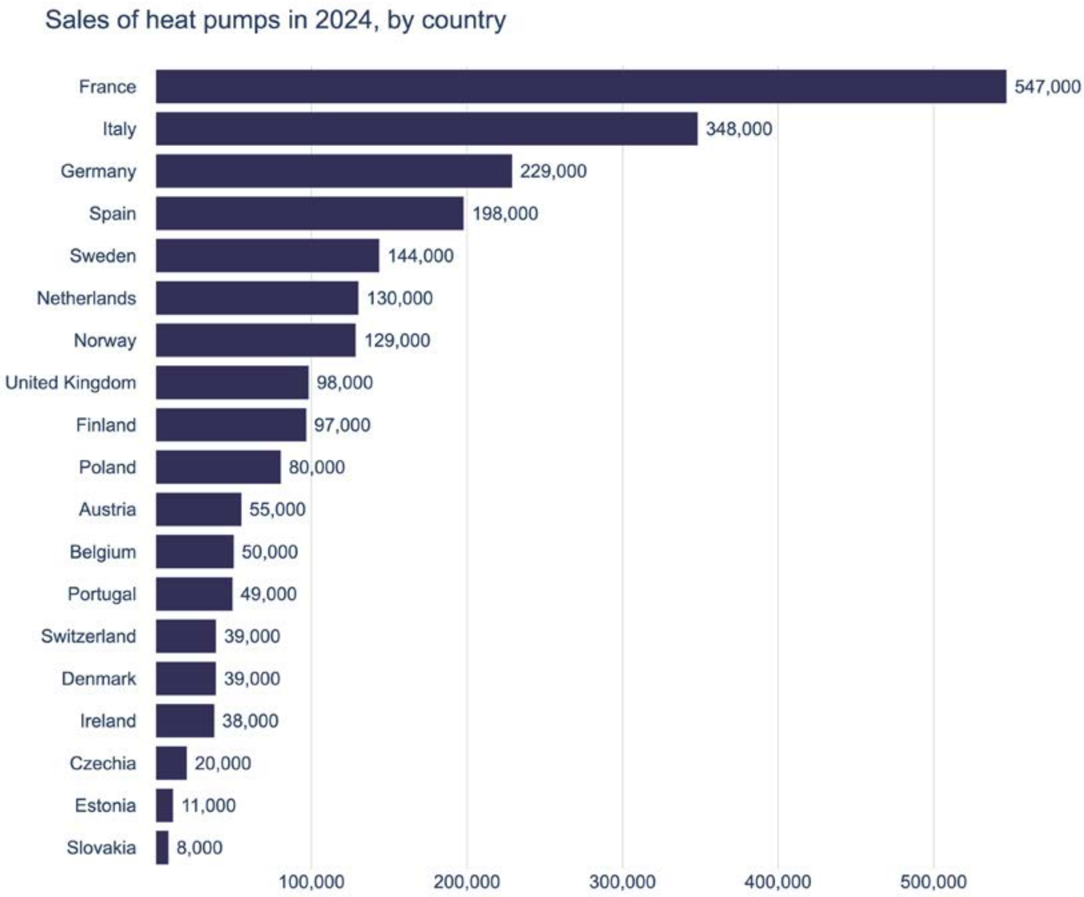
Executive summary

2024 was a year of challenges for the heat pump industry. Around 2.31 million heat pumps were sold in 19 European countries, a drop of 22% on 2023 levels. This had a significant impact on manufacturers, their employees and shareholders.

The most extreme cases were the Czech Republic with sales declining 64% and Germany with a 48% drop. However, the UK bucked the trend with a 56% increase in sales.

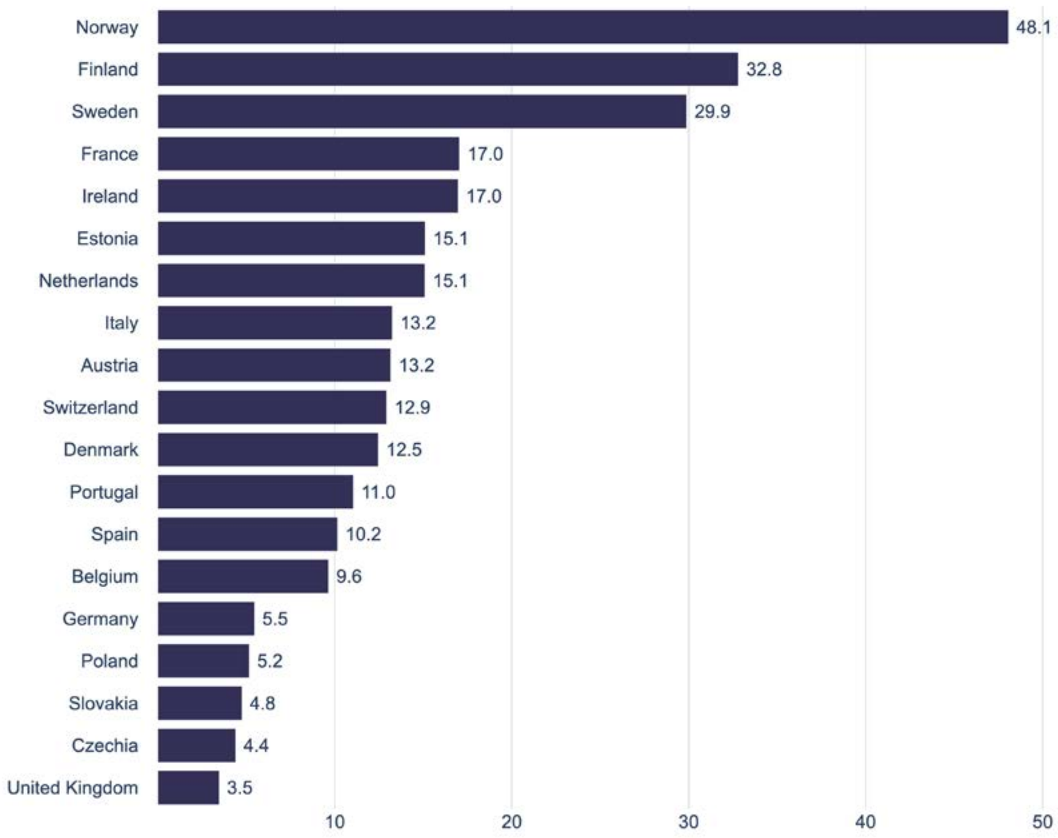
The countries with the highest sales in terms of units were France with 546,000 heat pumps sold, and – quite far behind – Italy with around 348,000 units. In terms of sales per 1,000 households, the leaders in 2024 were Norway with 48 sales per 1,000 households, and Finland with 33.

Figure 1



Sales per 1,000 households in 2024, by country

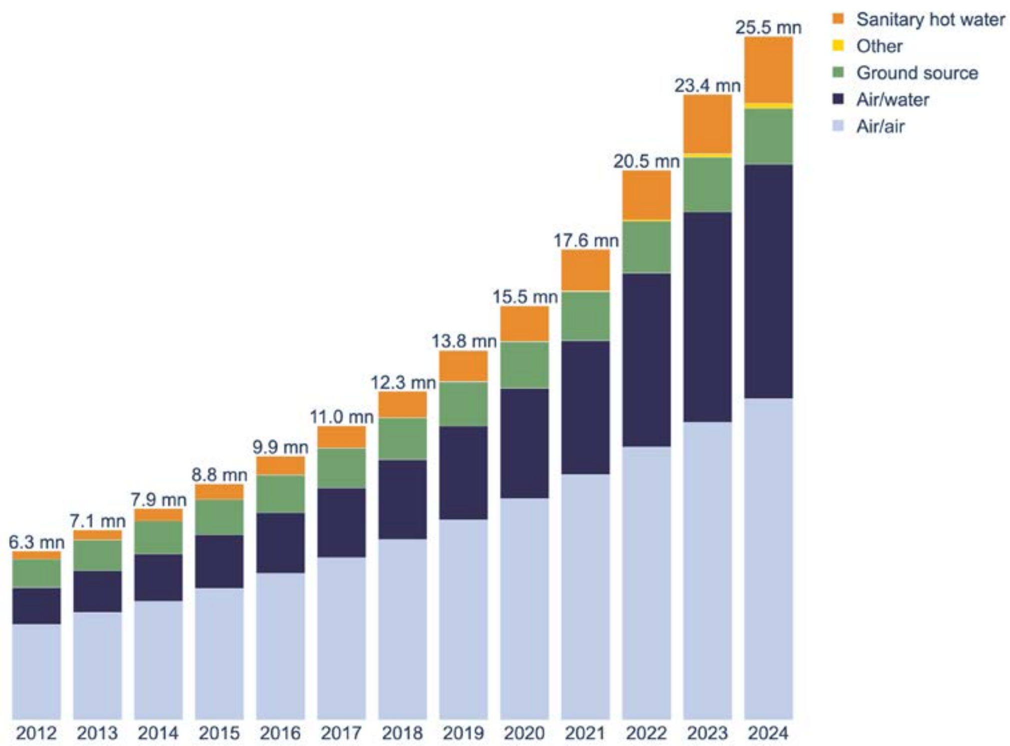
Figure 2



The latest figures from these 19 countries add up to a total stock of around 25.5 million installed heat pumps in Europe*. These countries are Austria, Belgium, Czechia, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Slovakia, Spain, Sweden, Switzerland and the United Kingdom. This means around 12% of European households have a heat pump.

Annual stock of heat pumps in 19 European countries

Figure 3



What's more, EHPA has been able to gather estimated sales for 2024 from nine additional European countries for the first time. This was done by using 2023 sales figures from the EurObserv'ER Heat Pump Barometer 2024 and adding 2024 sales estimates from heat pump manufacturers.

These are Bulgaria with 8,000 heat pumps sold; Croatia with 8,000; Cyprus 3,000; Greece with 18,000, Latvia with 4,000; Luxembourg 1,000; Malta 6,000, Romania with 10,000 and Slovenia with 13,000. However, these countries have not been included in any comparisons concerning sales over time or stock, since only numbers for 2024 are available.

From the original countries, those with the highest total amount of installed heat pumps are France with a stock of around 6.5 million and Italy with just under 4.2 million. In terms of total installed heat pumps per 1,000 households, the leaders in 2024 were Norway with approximately 630 heat pumps for every 1,000 households, and Finland with just above 520.

Figure 4

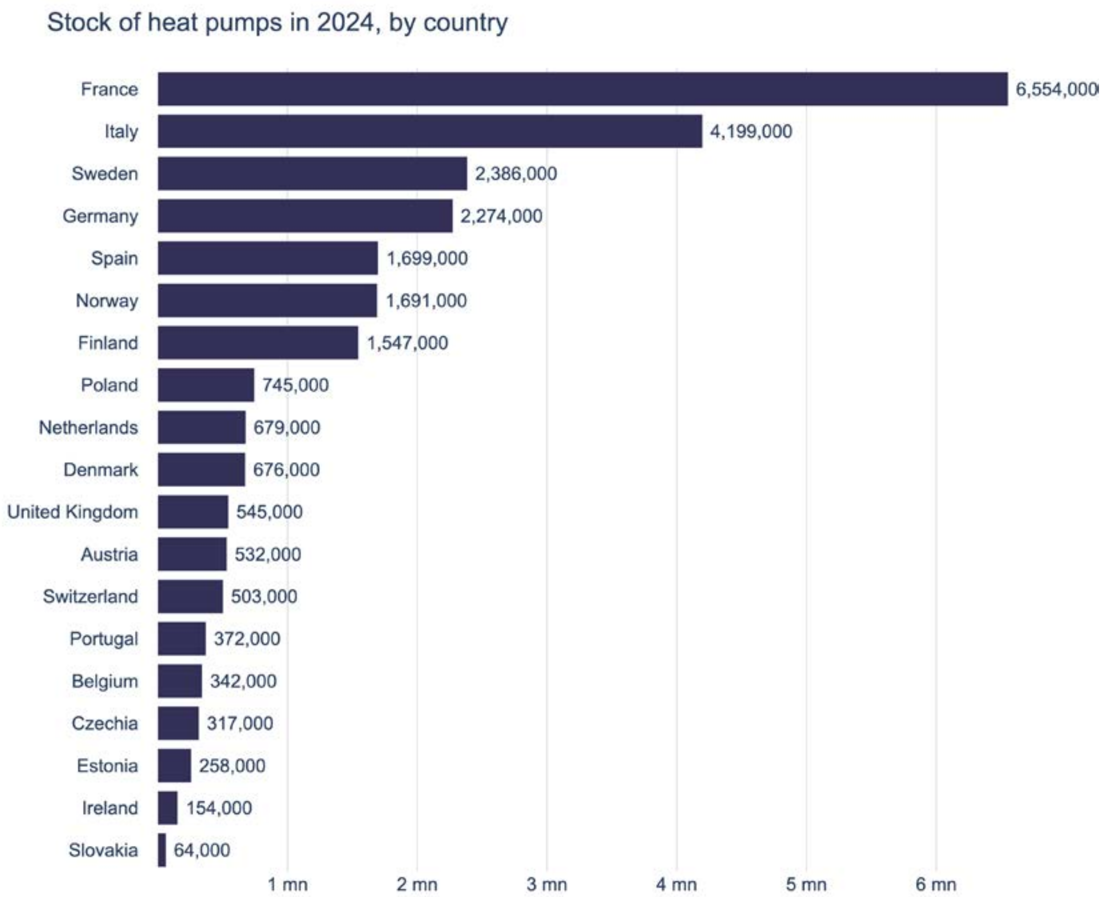
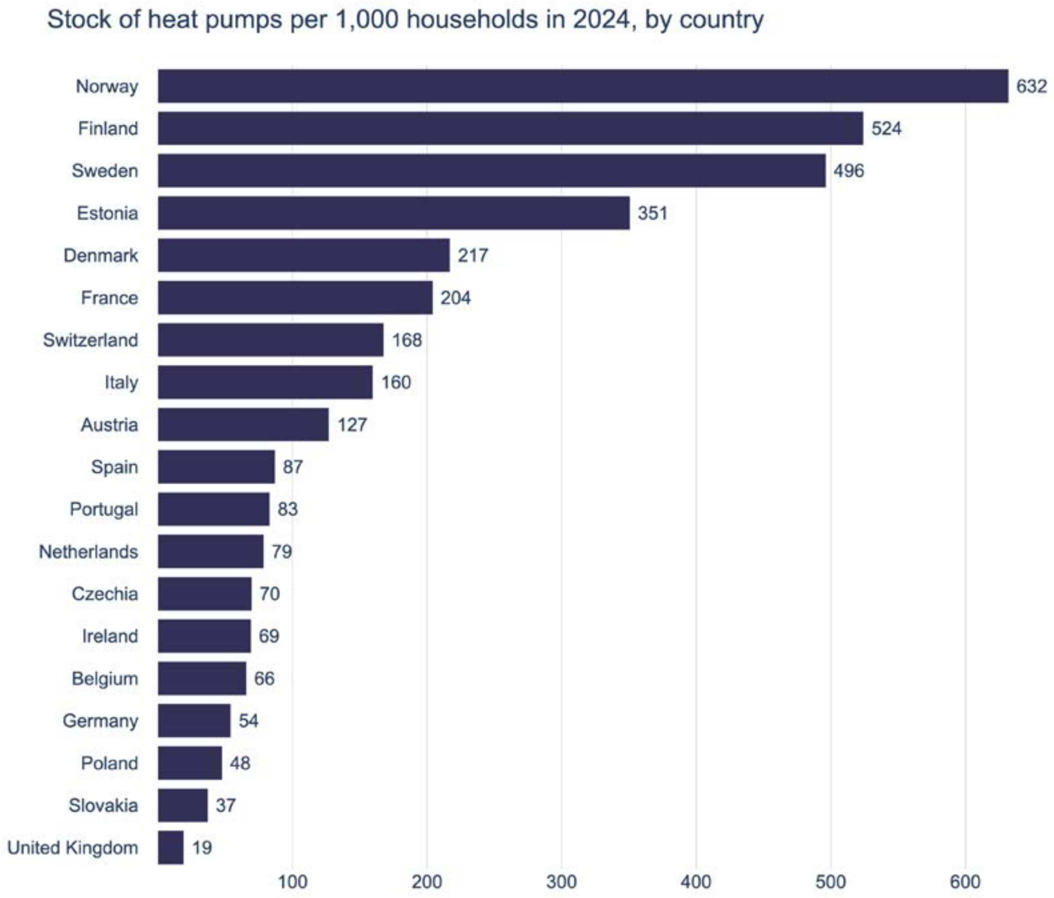


Figure 5



In terms of technology, the biggest sales were of reversible air to air heat pumps (875,000 sold) followed by heating-only air to water heat pumps (668,000 sold).

Figure 6

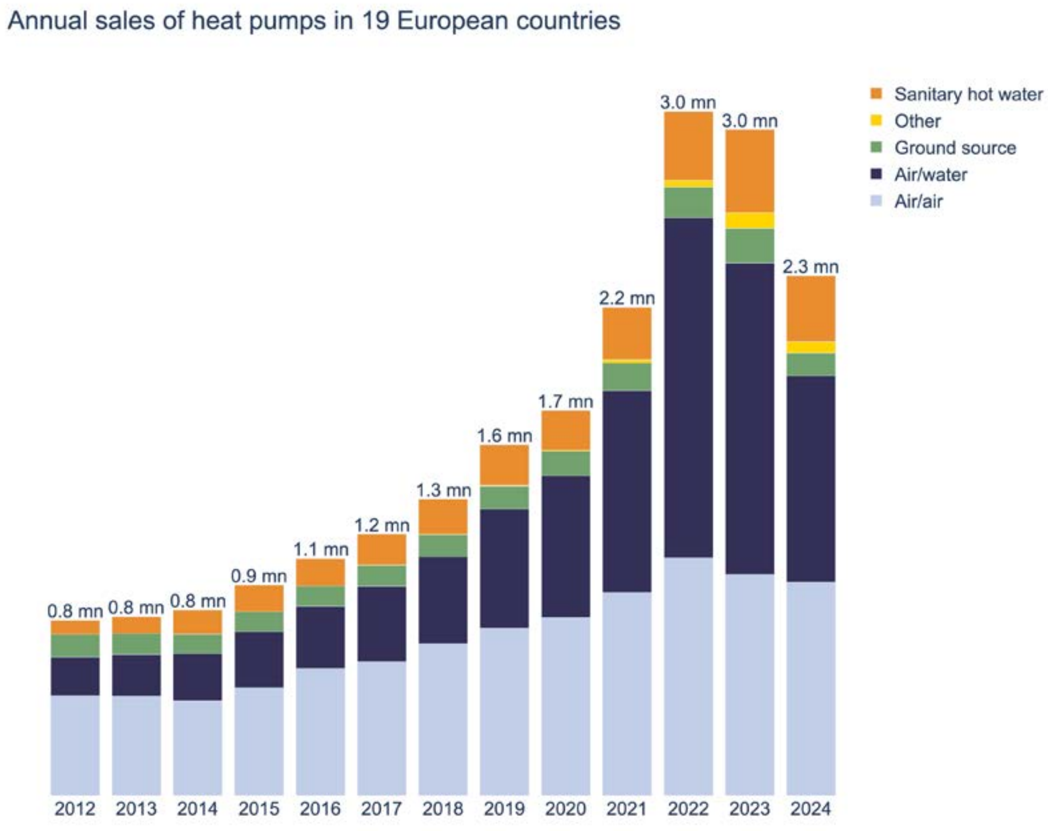
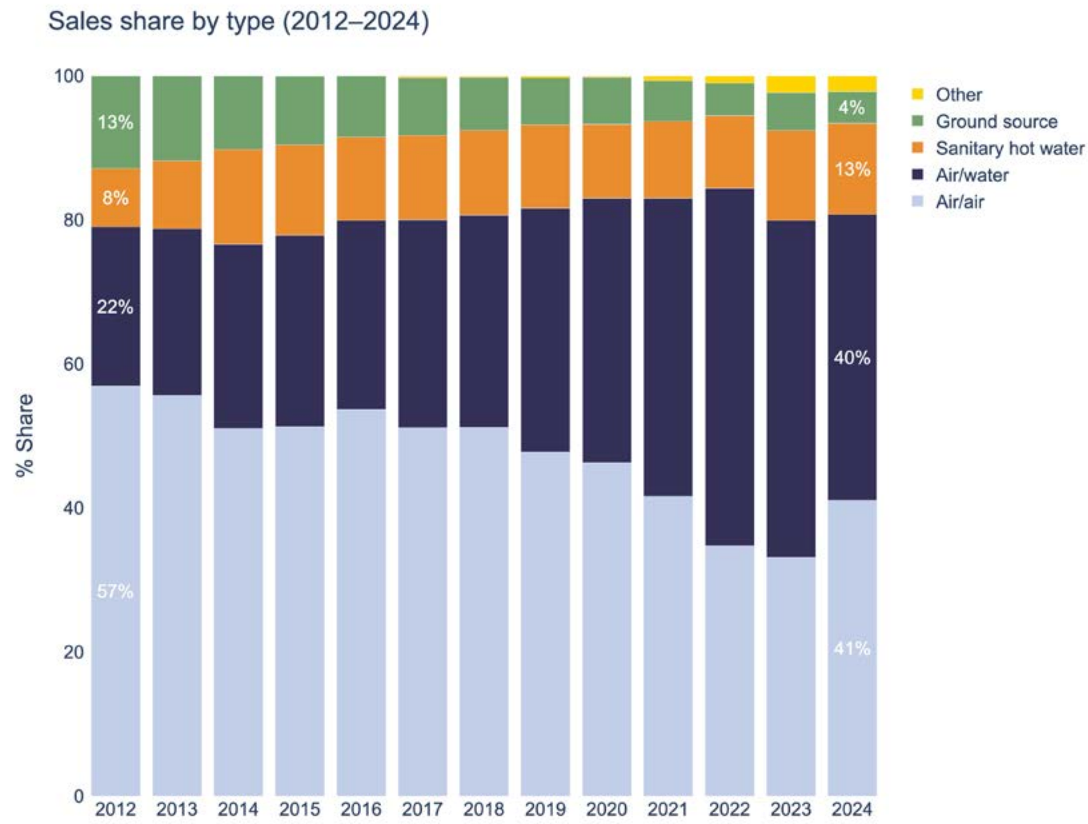


Figure 7



Overall, the trends for the past few years show that the market grew for a decade, hit a peak in 2022, and since then has come back down to previous levels. The record year of 2022 can be put down to Russia's invasion of Ukraine. This sent gas prices skyrocketing, making heat pumps a more competitive heating option, and governments ramped up support and subsidies for heat pumps to help consumers.

The falling sales since then is due to changes and reductions in those support schemes, rocking consumer confidence; a sluggish economy with a cost of living crisis, and the price of subsidised gas coming back down, as well as considerable misinformation circulating about heat pumps. Low gas prices mean that heat pumps are less competitive to run, even though they are up to five times as efficient as gas boilers.

The current slowing of heat pump market growth means Europe is likely to miss its energy security and climate ambitions. On current trends (based on 2015-2021 average sales growth), Europe will fall short of its 60 million heat pump target for 2030 by 15 million heat pumps – a 25% gap.

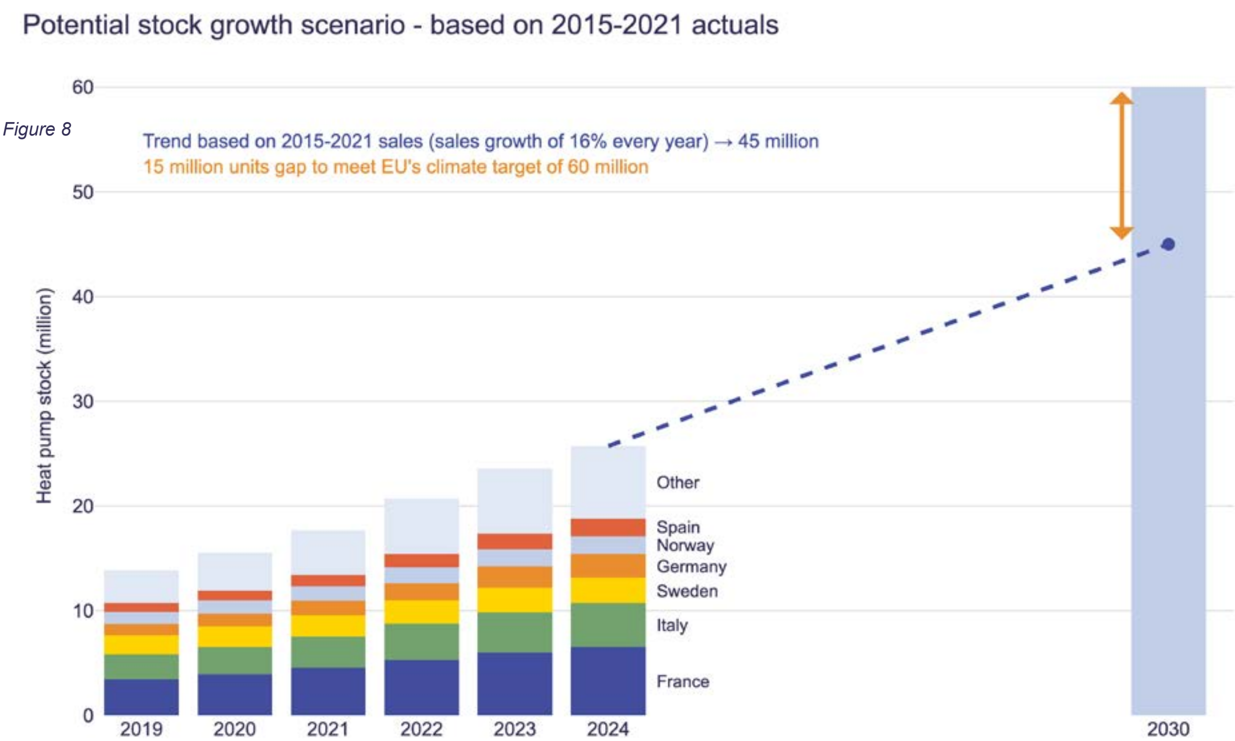


Figure 8

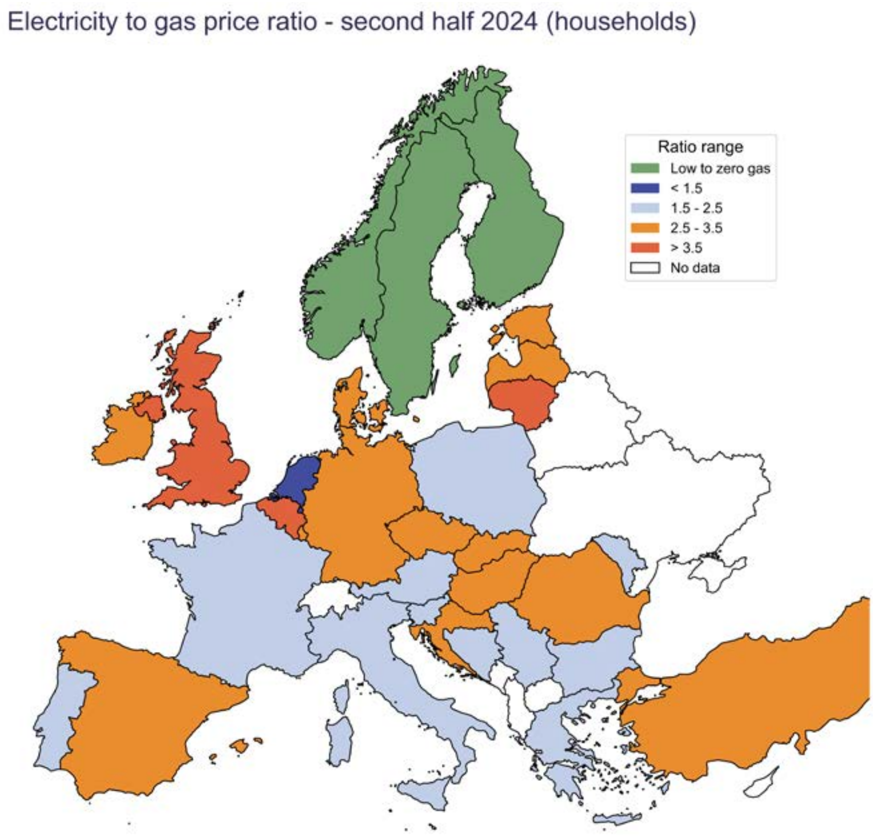
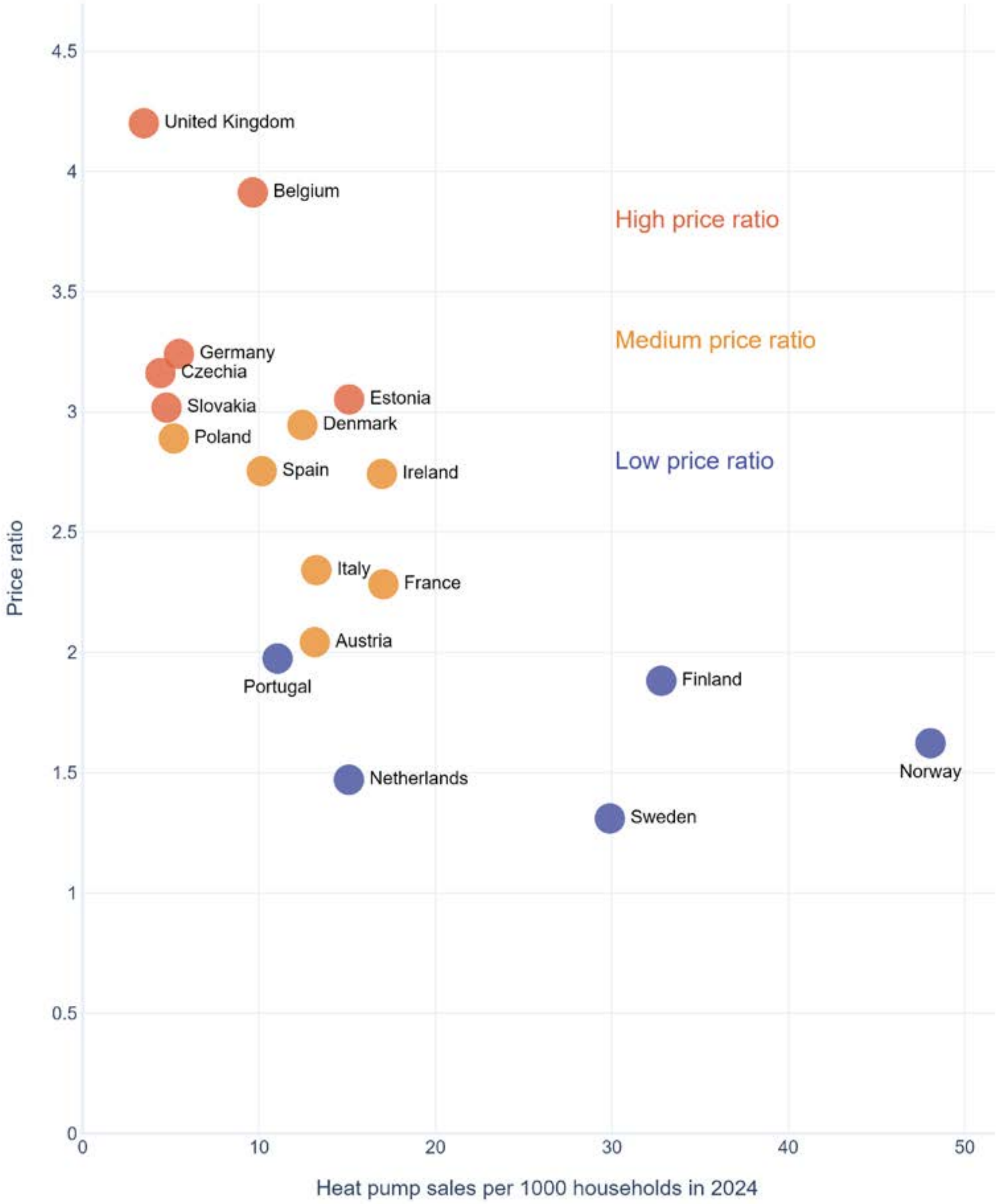


Figure 9

Source: Eurostat, UK Heat Pump Association (HPA),
Polish Organisation of Heat Pump Technology Development (PORT PC).
Includes all taxes and levies.

Lower electricity-to-gas price ratios lead to more heat pump sales per household

Figure 10



The latest figures come at a time when world geopolitics make the heat pump sector more relevant than ever. The 25.5 million heat pumps installed in these 19 countries are avoiding 21 billion cubic metres of gas imports (in 2024, the EU imported about 90% of its gas supply), saving an estimated 5.4 billion euros per year. If just 7% more European households – 14 million altogether – swapped a gas boiler for a heat pump we would avoid gas equivalent to what the EU imports from Russia annually.

In terms of decarbonisation, heat pumps are doing the same as removing 50 million cars from the roads, a fifth of the 250 million registered passenger cars in the EU.

In terms of industry leadership, there are now over 300 manufacturing sites in Europe, and the heat pump sector employs 433,000 people directly and indirectly. Up to 73% of heat pumps sold in Europe are also produced here, and this is set to increase.

The importance of energy security and boosting domestic clean tech was seen in European and national legislation and actions last year. The EU’s Net Zero Industry Act, adopted in June, aims to boost net zero sectors. Its plan to end Russian gas imports by 2027 published in May 2025 is a follow-up of 2022’s REPowerEU package to boost energy security.

Heat pumps need to be a central part of these initiatives. Ensuring this is the case, as well as safeguarding already agreed climate and energy legislation, is a key part of EHPA and its members' work.

Indeed, many national governments are working on increasing the sales of heat pumps in line with their own energy and climate plans. For example, the removal of subsidies for fossil fuel boilers under the newly revised EU law on the energy performance of buildings, the increased effort in communications in Germany to counter common myths, and the UK's increasing budget for boiler upgrades on top of their 56% increase in heat pump sales shows some positive impact that policy is having.

Figure 11

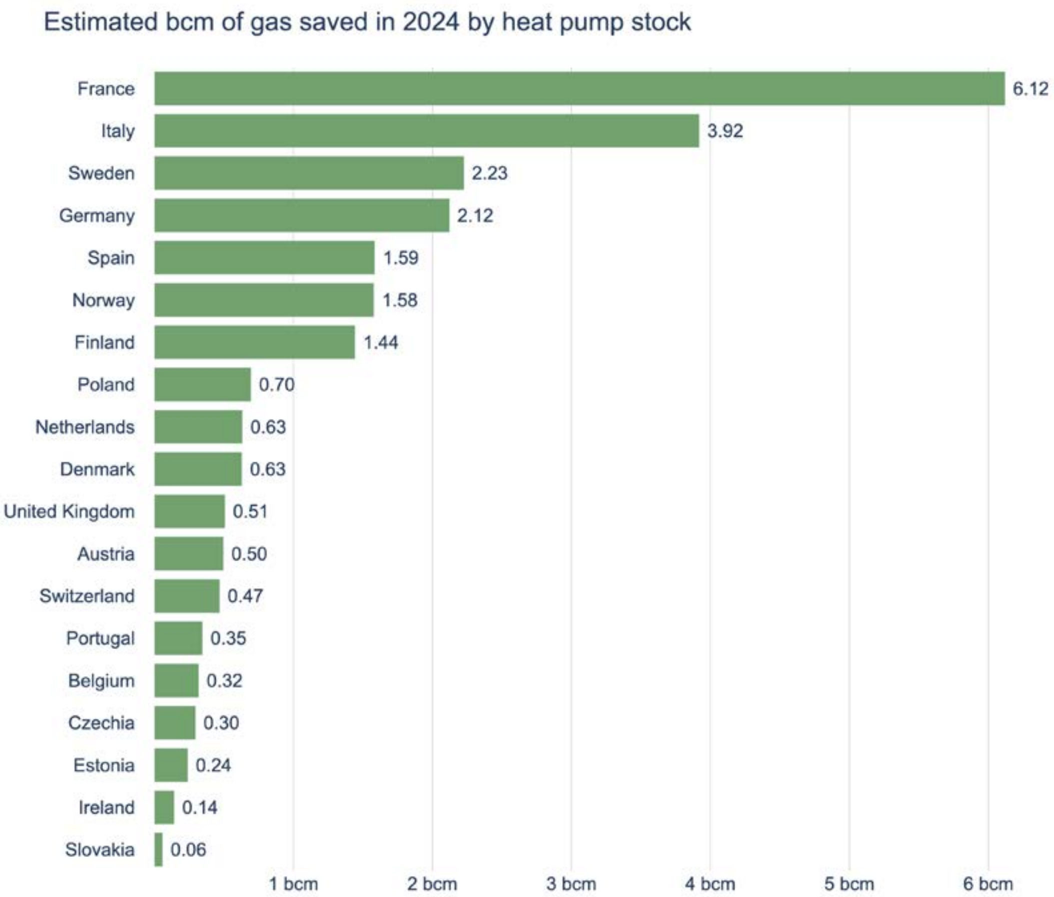
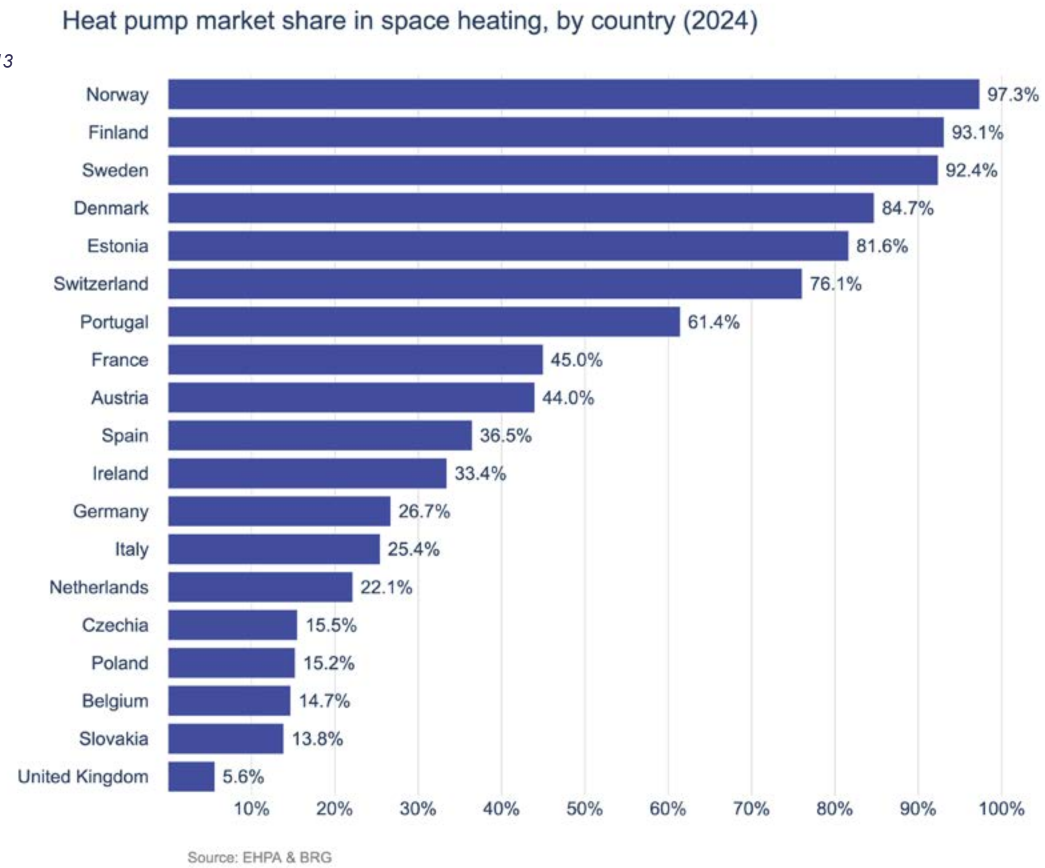


Figure 12

Figure 13



For the heat pump sector to grow and tap its potential, stability and predictability are essential for investors, citizens and manufacturers. A clear Europe-level strategy to accelerate heat pump deployment is needed, alongside electricity pricing that makes heat pumps the most competitive option.

It is also crucial that European governments swiftly implement the EU Green Deal policies, such as the renewable energy and energy efficiency targets for 2030. The EU's upcoming Emissions Trading System 2 – which will put a price on carbon emissions from heating and transport – will be a very useful piece of this, providing up to €65 billion via the Social Climate Fund to accelerate the deployment of heat pumps and other clean technologies.

Driving heat pump roll-out will in turn drive investment in European manufacturing and jobs, boosting competitiveness and energy security.

Figure 14

2024 heat pump sales, change compared to 2023 sales, and stock as of end 2024

Country	2024 sales	Change in sales on 2023 (%)	Stock end 2024
Austria	55,100	0%	532,400
Belgium	50,100	-40%	342,400
Czechia	20,000	-64%	317,400
Denmark	38,700	-30%	675,500
Estonia	11,100	-43%	257,800
Finland	96,800	-12%	1,546,700
France	546,900	-24%	6,554,200
Germany	229,200	-48%	2,274,000
Ireland	37,600	+19%	153,500
Italy	348,400	-4%	4,199,000
Netherlands	130,300	-30%	679,100
Poland	80,400	-36%	745,100
Portugal	49,400	+2%	372,000
Slovakia	8,200	-31%	64,200
Spain	198,000	-6%	1,698,700
Sweden	143,700	-24%	2,386,000
United Kingdom	98,300	+56%	544,600
Norway	128,600	-11%	1,691,400
Switzerland	38,800	-25%	503,400
Europe 19	**2,309,600**	**-22%**	**25,537,400**

The **European Heat Pump Association (EHPA)** represents the European heat pump sector. Our over 230 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.

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