

European Solar Thermal markets

Developments and framework
conditions

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Introducing ESTIF

- European Solar Thermal Industry Federation
- Representing the solar heating and cooling sector at EU level
- 100 members, representing >95% of the market
- A founding member of EREC
- Based in the Renewable Energy House, Brussels



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Thanks!!!

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Intelligent Energy  **Europe**



Transfer of experience for the development of Solar thermal products

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European Solar Thermal Markets

- Thermal Energy
- Innovative market
- A booming market
- Promoting market growth



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Innovative Market

- Domestic Hot Water
- Space Heating
- Industrial Process Heat
- Solar Cooling
- Water Treatment (desalination)



Velux/ESTIF



S.O.L.I.D./ESTIF



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Building + solar thermal: the old add-on approach



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Integrating solar thermal into buildings



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Integrating solar thermal into buildings



Integrating solar thermal into buildings



Integrating solar thermal into buildings



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European Solar Thermal Markets

- A booming market
 - Strong industry
 - Constant steady growth
 - Huge growth potential



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A strong and growing industry

- 3.3 GWth of newly installed capacity in 2008
- 19 GWth of capacity in operation
- Turnover above 3.000 mEUR/year
- 40.000 full time jobs (most in small and medium size installation businesses)

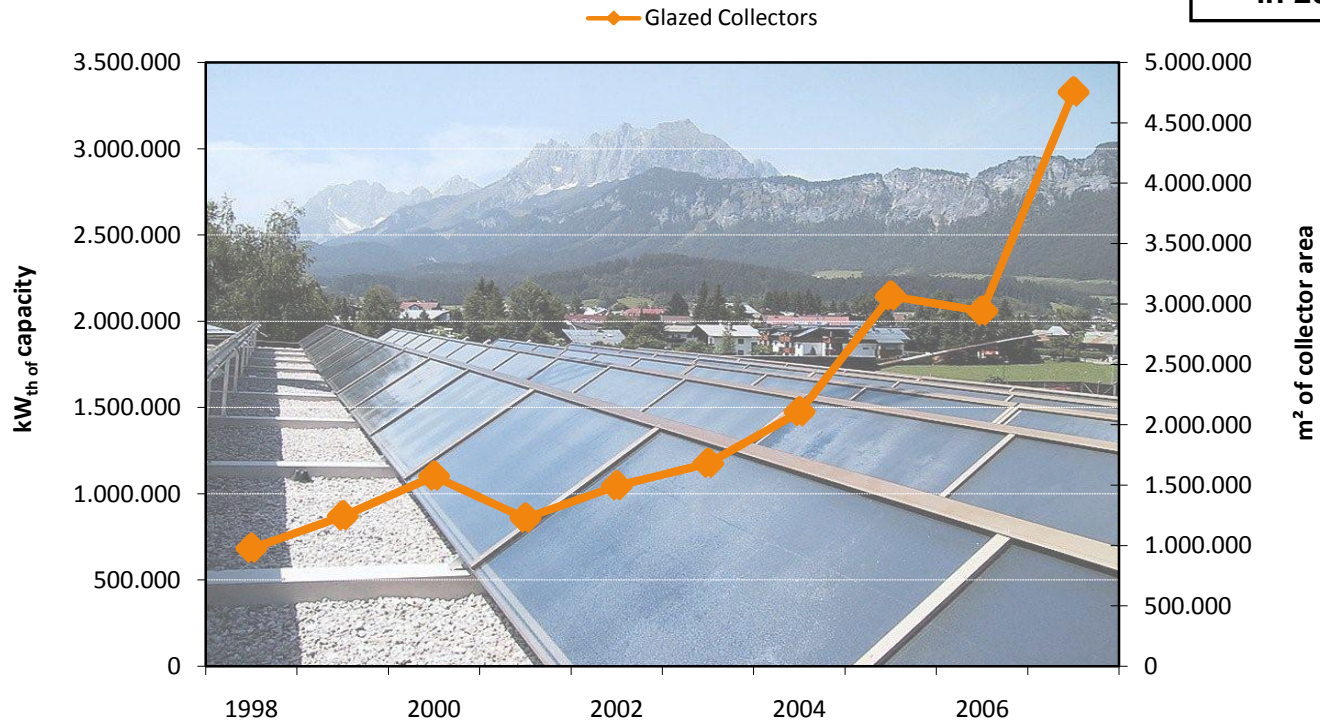


GASOKOL/ESTIF

EU Solar Thermal market 1990-2009

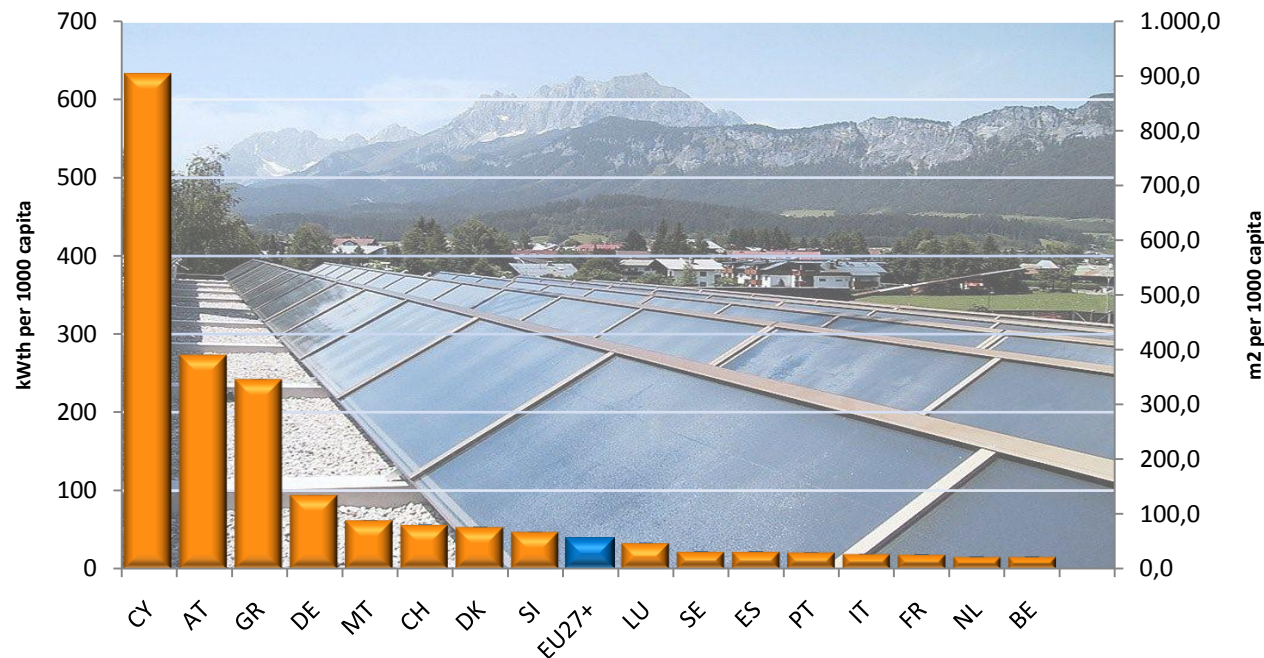
Solar Thermal Collector Market in EU-27 and Switzerland

**~3.3 GW_{th} of
new capacity
in 2008**

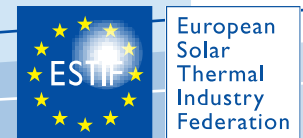


Great opportunities in Europe

Solar Thermal Capacity in Operation *EU-27 and Switzerland*



Glazed collectors in kW_{th} and m² and per 1000 capita



Future development and potential

- Potential study shows:

- Heating and cooling responsible for almost 50% of final energy demand in Europe; 75% of this in low-temperatures
- 50% of low-temperature heating and cooling could come from solar thermal (long-term)
- >450 000 sustainable full-time jobs could be created by 2020



Wagner & Co/ESTIF



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European Solar Thermal Markets

- Promoting Market Growth
 - Ambitious National Targets
 - Coherent measures
 - European approach (...Solar Keymark...)
 - Not an EU exclusive
 - Not only at National level



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Ambitious Targets & Coherent Measures



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European Solar Thermal Markets

- Awareness Raising
 - Accessible technology
 - Practical/effective
 - Not miraculous



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European Solar Thermal Markets

■ Financial Incentives

- Continuity
- Coherence of parameters
- Clear target
- Quality criteria
- Monitoring and evaluation
- Financial resources
- Simplicity
- Flanking measures – alone not enough!!!



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European Solar Thermal Markets

■ Financial Incentives

- Options in place
 - Grants
 - Most of the countries (per sqm, per system)
 - Tax reductions
 - France
 - Loans at reduced rates
 - Germany (building renovation)



European Solar Thermal Markets

- Regulations
 - Solar ordinances (Barcelona model)
 - Energy performance of buildings
 - Efficiency and renewables
- Training
 - Quality assurance – sustainability
 - Efficiency and satisfaction
 - Local jobs



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Ambitious Targets & Coherent Measures



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