

# European Solar Thermal markets

## Developments and framework conditions

Ljubljana, 4 June 2009

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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!!!

This conference is supported by the European Commission under their Intelligent Energy-Europe Programme

**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



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

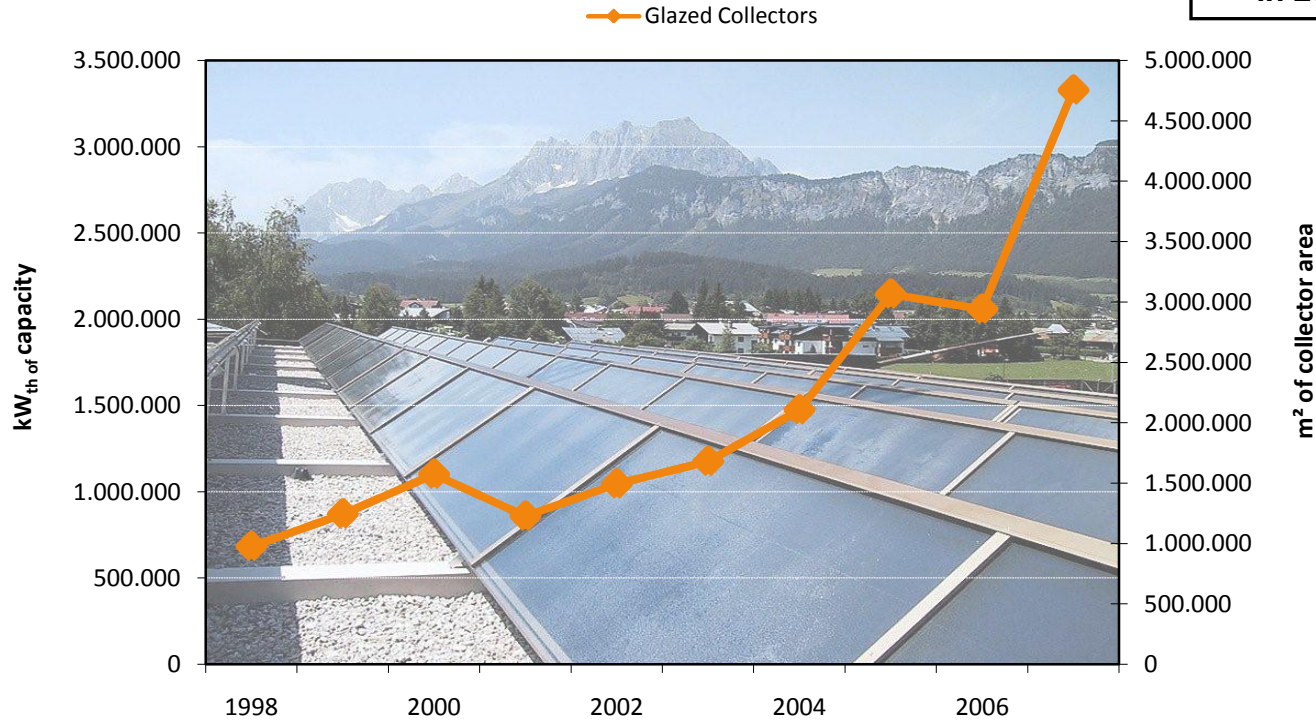


GASOKOL/ESTIF

# EU Solar Thermal market 1990-2009

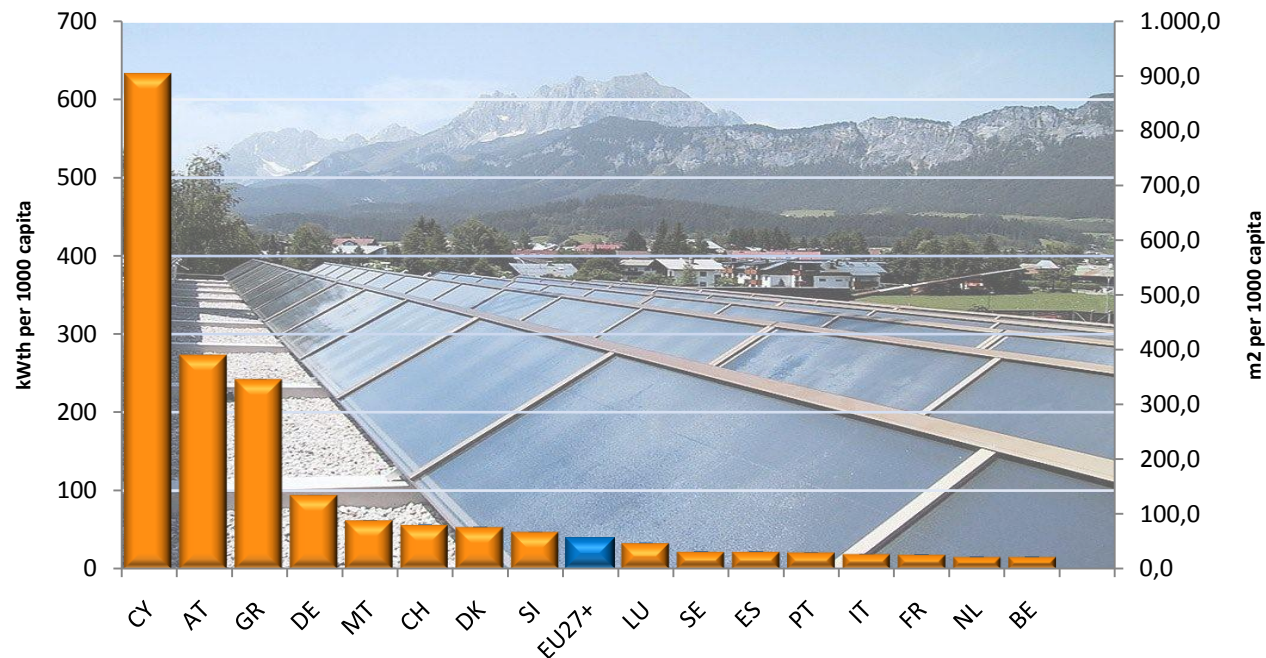
Solar Thermal Collector Market in EU-27 and Switzerland

**~3.3 GW<sub>th</sub> of  
new capacity  
in 2008**

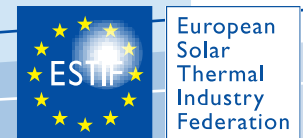


# Great opportunities in Europe

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



Glazed collectors in kW<sub>th</sub> and m<sup>2</sup> and per 1000 capita



# Future development and potential

- Forthcoming 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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