



# 3<sup>rd</sup> Round Table

Daniel Hec  
General Secretary  
Marcogaz

INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
for existing residential buildings

---



# Future EU Residential/Commercial Gas Market

## The Natural Gas Sector Vision

INTERNATIONAL CONFERENCE

**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
for existing residential buildings

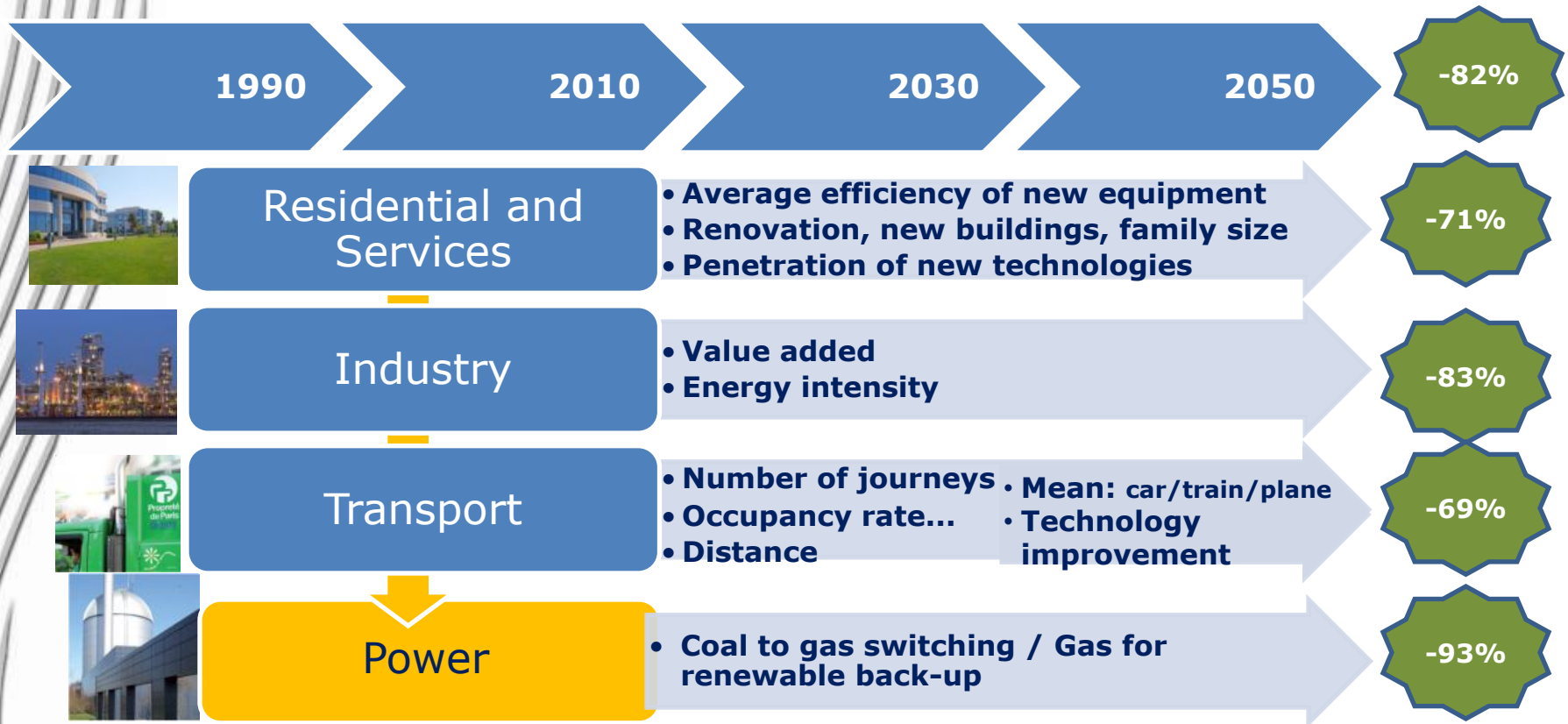
---

# Natural Gas CARES for the world

- **CLEAN:**
  - 50% less CO<sub>2</sub> than coal
  - Benefits available now
- **AFFORDABLE:**
  - Capital cost of gas fired power plants
  - 50% less than coal
  - 33% of nuclear
  - 20% of wind onshore
  - Infrastructure is already there
- **RELIABLE:**
  - Wide variety of sources, pipelines and LNG
  - Flexible as a backup source
- **EFFICIENT:**
  - Condensing boilers 98% efficiency
  - Power plant requires short construction time
- **SECURE:**
  - Huge reserves: 120 years (including shale gas)
  - The best safety record among energies

# The EU Gas Industry vision: Eurogas Roadmap 2050

The Eurogas Roadmap identifies the **potential of natural gas** use and technologies in all sectors as the best way of achieving GHG reduction compliant with the EC's target.



INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
 for existing residential buildings

Future EU Residential/Commercial Gas Market

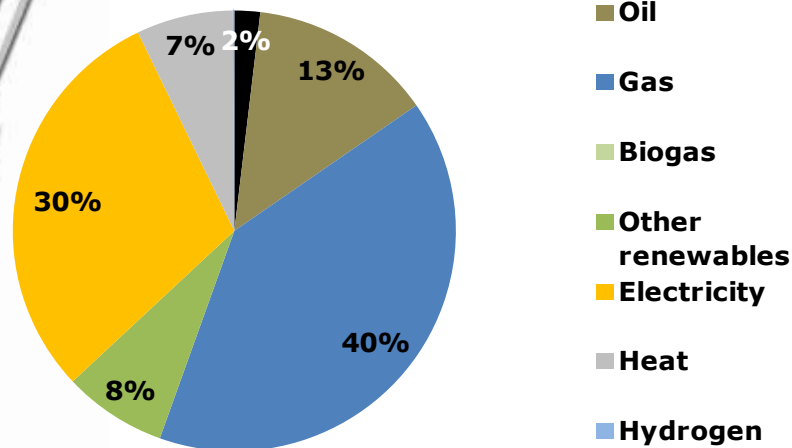
Daniel Hec – General Secretary Marcogaz

# Residential & Services

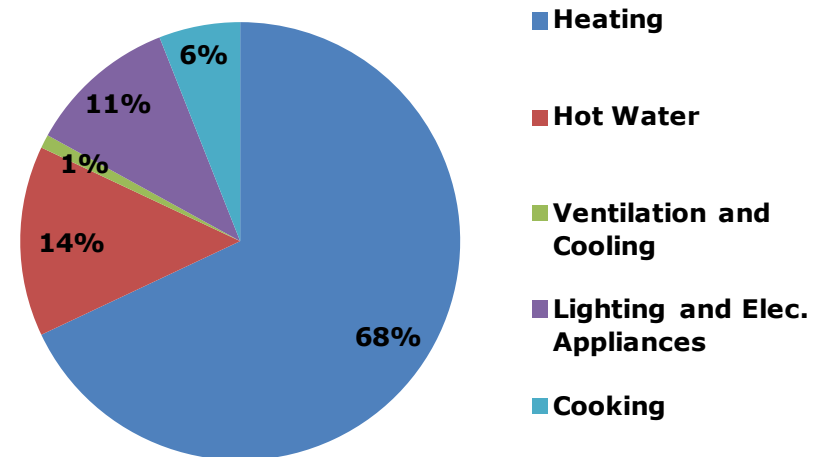
## *Description of the sector in EU*

- 18% of CO<sub>2</sub> emissions
- 200 million households
- 5.5 billion m<sup>2</sup> of offices
- 70% of energy is used for heating
- Gas leader with about 40% of final energy demand

**2010 Final energy demand by fuel**



**2010 Final demand by end use**



INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
 for existing residential buildings

Future EU Residential/Commercial Gas Market

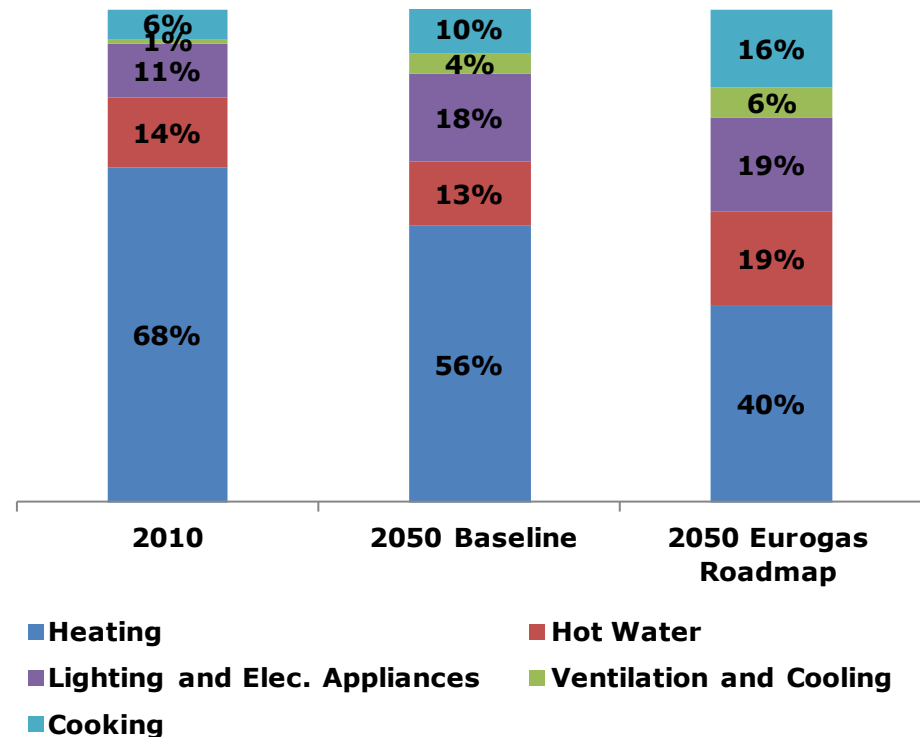
Daniel Hec – General Secretary Marcogaz

# Residential & Services

## *Main assumptions (1/2)*

- Renovation of buildings
  - From 1 to 3% per year
  - Energy savings from 15% to 40%-50%
- Behaviour
  - Smaller spaces
  - Average temperature of dwellings: 19 C - 20 C
  - Switch to less polluting fuel

**Final demand by end use**

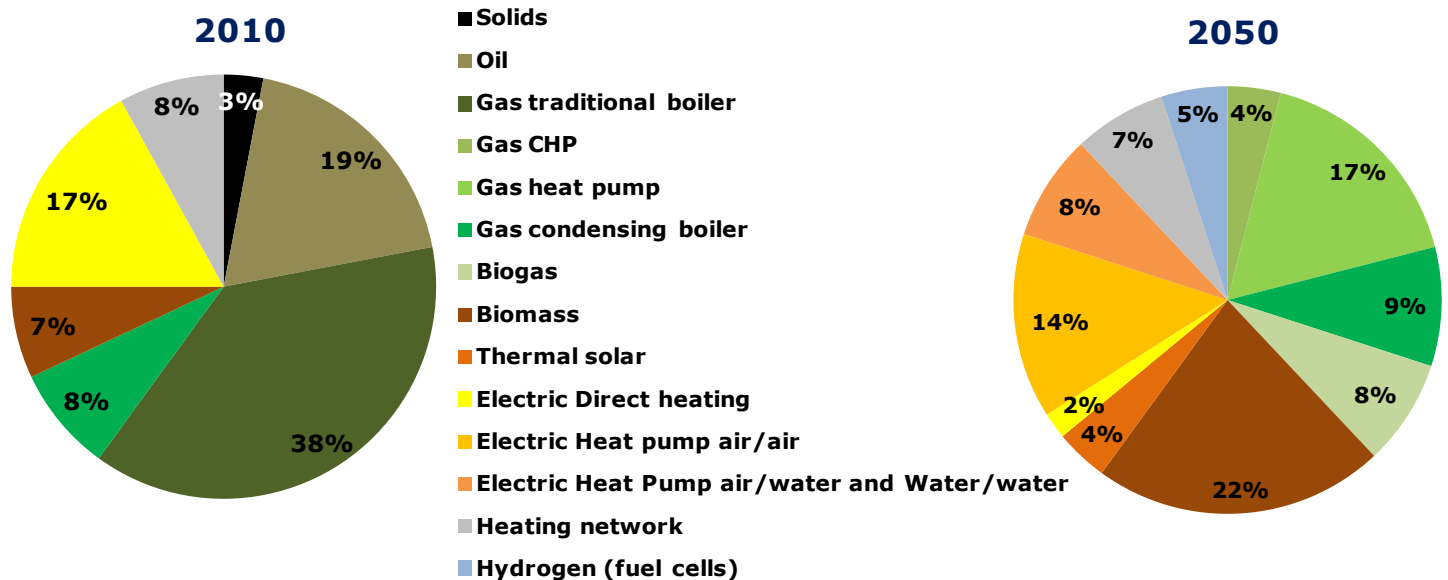


# Residential & Services

## Main assumptions (2/2)

- New equipments and fuel switch
  - More efficient equipments and hybrid installations
  - Highly efficient heating technologies
  - Switch to less polluting fuels

### Equipment market shares in the residential sector in the Eurogas Roadmap



INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
 for existing residential buildings

Future EU Residential/Commercial Gas Market

Daniel Hec – General Secretary Marcogaz

# A strong market opportunity for environmentally friendly products

- **Gas Heat Pumps** are clearly one of the most important products to reach the EU targets.
- **Advantages**
  - Excellent efficiency on primary energy
  - Easy to install in both new and existing buildings (radiators)
  - Good capacity and efficiency at low temperature
  - Reliable and quiet (no compressors in GAHP), easy maintenance



**Developpment of additional products is important**



**MARCOGAZ definitly support HEAT4U project**

INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
for existing residential buildings

Future EU Residential/Commercial Gas Market

Daniel Hec – General Secretary Marcogaz



## Founders of GasNaturally



European Union of the Natural Gas Industry



International Association of Oil & Gas Producers



International Gas Association



Technical Association of the European Natural Gas Industry



Gas Infrastructure Europe



European Gas Research Group



International Group of Liquefied Natural Gas Importers

INTERNATIONAL CONFERENCE

**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
for existing residential buildings

Future EU Residential/Commercial Gas Market

Daniel Hec – General Secretary Marcogaz

# Gas Naturally Campaign

- Promoted by all EU Gas Associations
- **Top messages:**
  - Immediate reduction in CO<sub>2</sub> emissions
  - Gas ideal partner for renewables
  - Key role of gas to be acknowledged
  - Stable long term investment framework needs clear political signal
- 2012 event: **The Gas Week 23rd – 27th April 2012 Brussels**
- Website: [www.gasnaturally.eu](http://www.gasnaturally.eu)



INTERNATIONAL CONFERENCE  
**HEAT4U** PROJECT January 26<sup>th</sup>, 2012

Gas Absorption Heat Pump solution  
for existing residential buildings

Future EU Residential/Commercial Gas Market

Daniel Hec – General Secretary Marcogaz