



# 1<sup>st</sup> Round Table

Thomas Nowak  
General Secretary  
European Heat Pump Association

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

Gas Absorption Heat Pump solution  
for existing residential buildings

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**OUTLOOK 2011**  
European Heat Pump Statistics



ehpa.org

# European Heat Pump Markets 2011: Where are GAHP?

Thomas Nowak

European Heat Pump Association

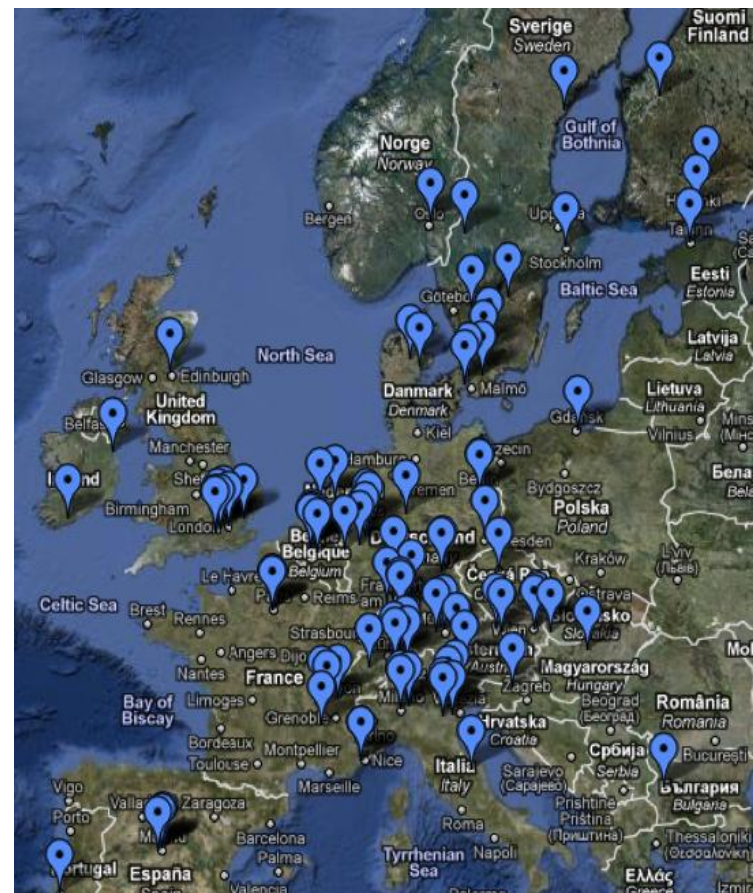
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# European Heat Pump Association (EHPA)

- 92 members from 22 countries (status 1/2012)
- Heat pump manufacturers (electric and thermal)
- Component manufacturers
- National associations
- Consultants
- Research & test institutes
- EU-wide representative of heat pump industry
- Registered in Brussels



**EHPA represents the majority of players in the EU heat pump industry!**

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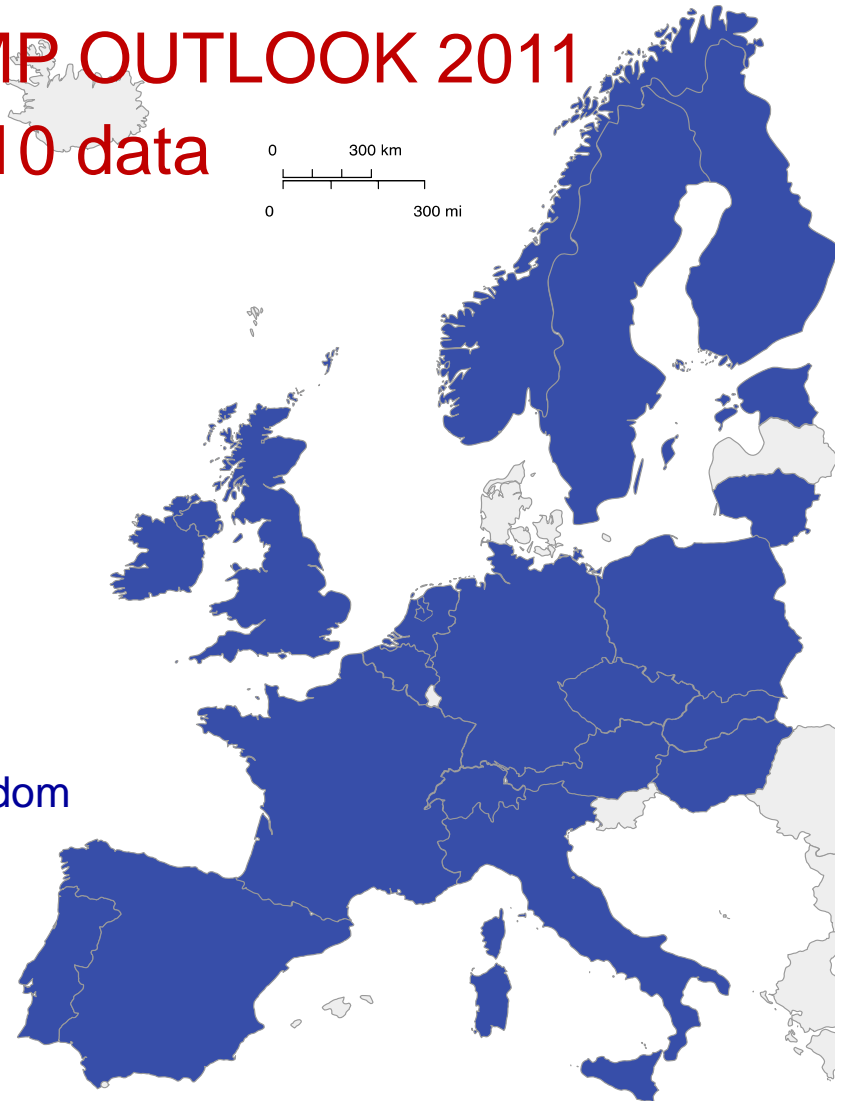
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# EUROPEAN HEAT PUMP OUTLOOK 2011

## 20 Markets covered, 2010 data

- Austria
  - Belgium
  - Czech Republic
  - Estonia
  - Finland
  - France
  - Germany
  - Hungary
  - Italy
  - Ireland
  - Lithuania
  - Netherlands
  - Norway
  - Poland
  - Portugal
  - Slovakia
  - Spain
  - Sweden
  - Switzerland
  - United Kingdom
- +
- China
  - Canada
  - Japan
  - USA



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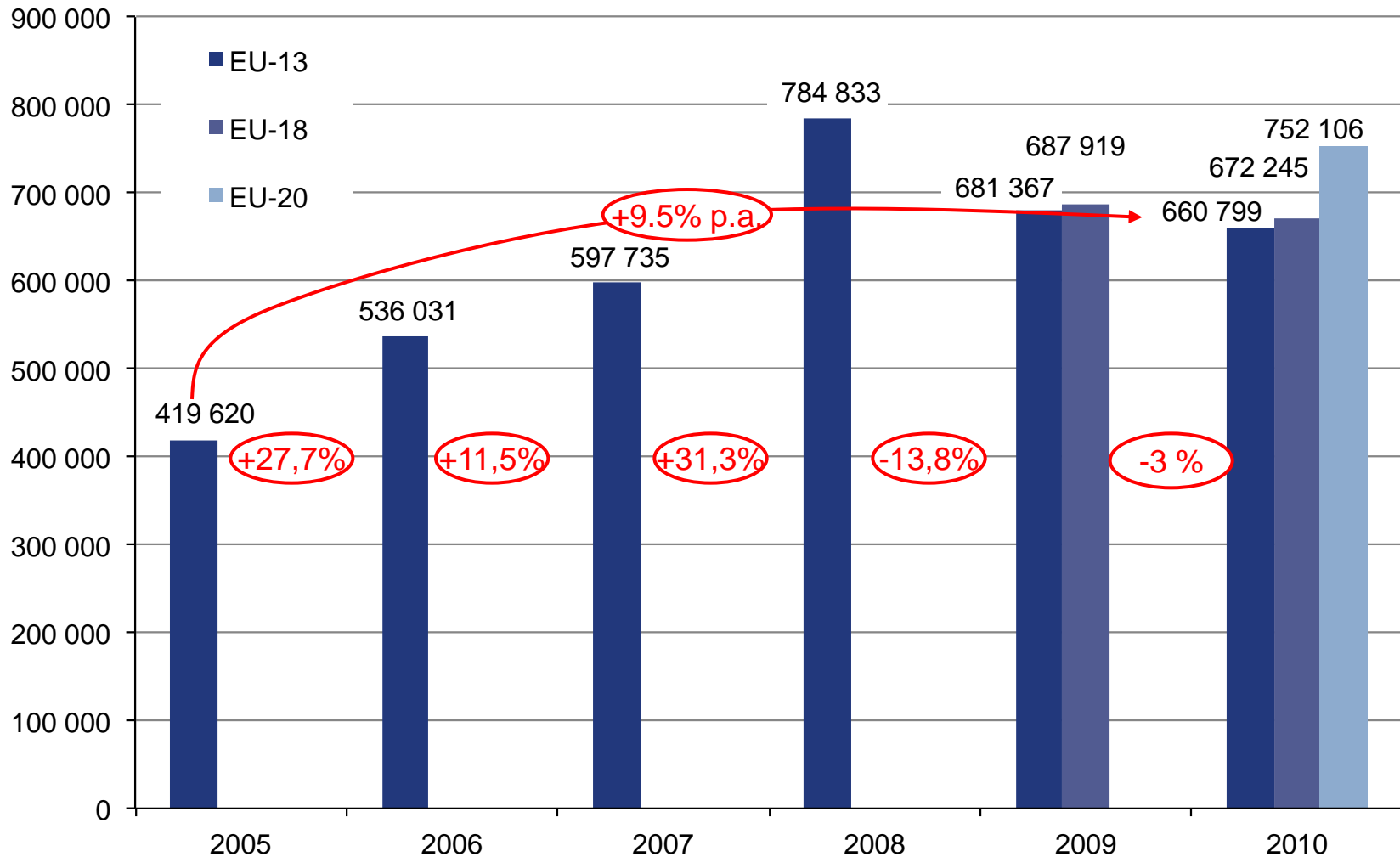
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# Market segments covered

	<b>New building</b>	<b>Renovation</b>
<b>Residential: single/double family house</b>	Mass market currently developing	Increasingly recognized market (France, Germany, Sweden, Switzerland), importance of sanitary hot water units increasing
<b>Residential: Multi-family residency</b>	Small; market developing	Initial steps are made
<b>Non-residential (commercial)</b>	Minority share in currently sold heat pumps. Several demonstration projects available, potential for heating and cooling projects by far not exploited.	Increasingly important with owners that value low operating cost. Special application in sewage systems, subways and tunnels.



# Total sales of heat pumps 2005-2010



Accumulated 2005 – 2010: 3,78 mio units

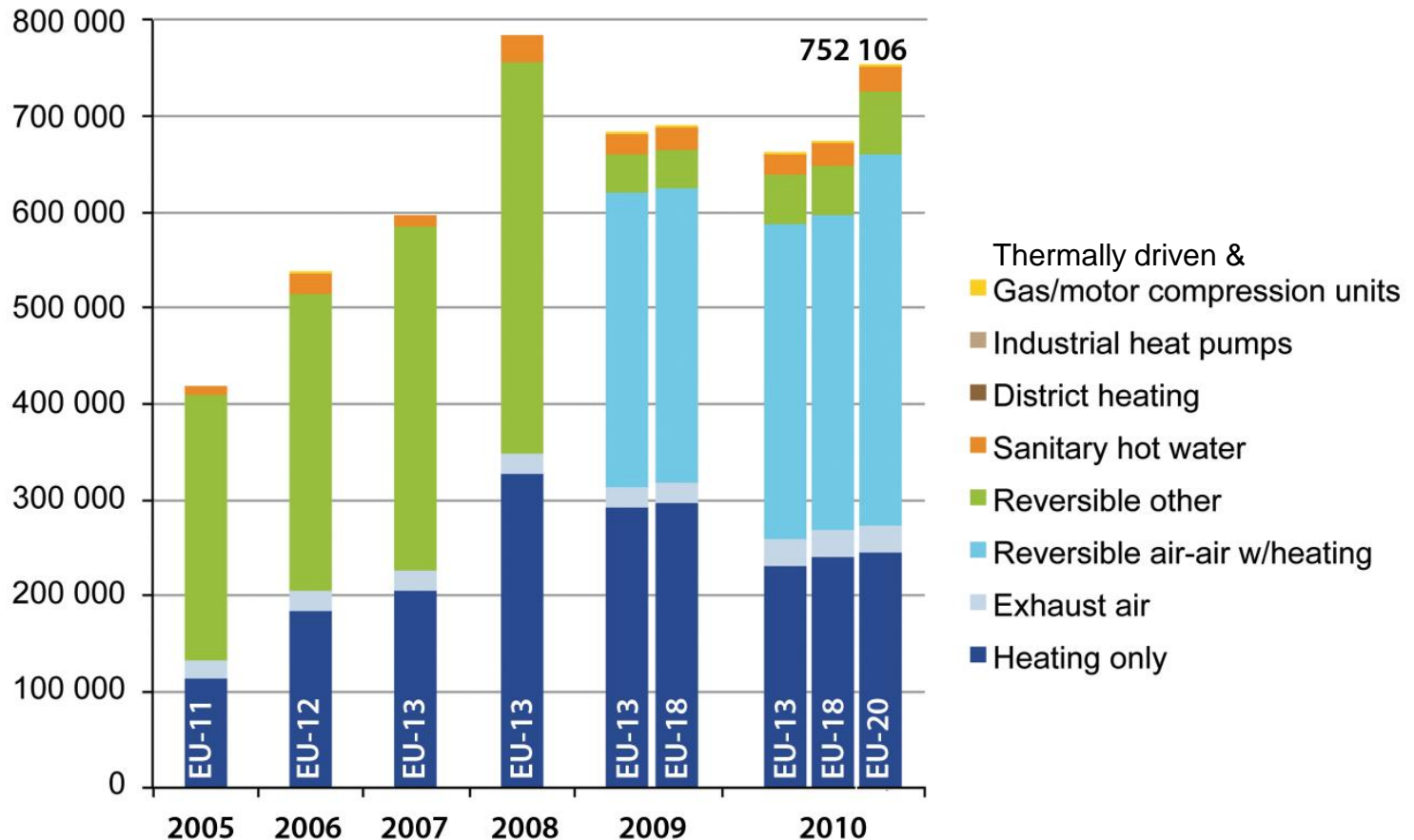
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# Total sales of heat pumps 2005-2010, by type



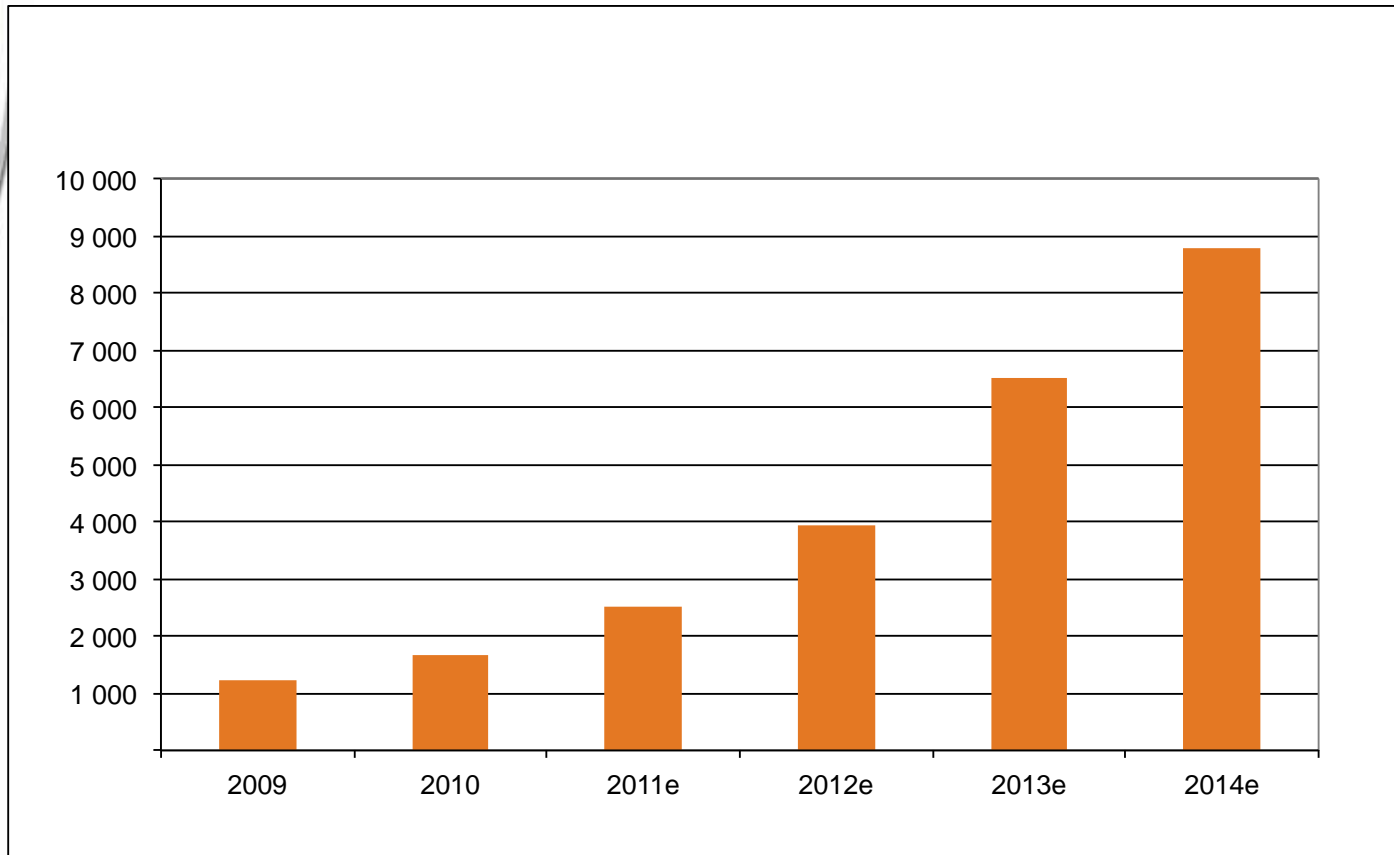
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# Thermally driven heat pumps (DE, NL, UK, IT)



Source: EHPA/Robur/BSRIA

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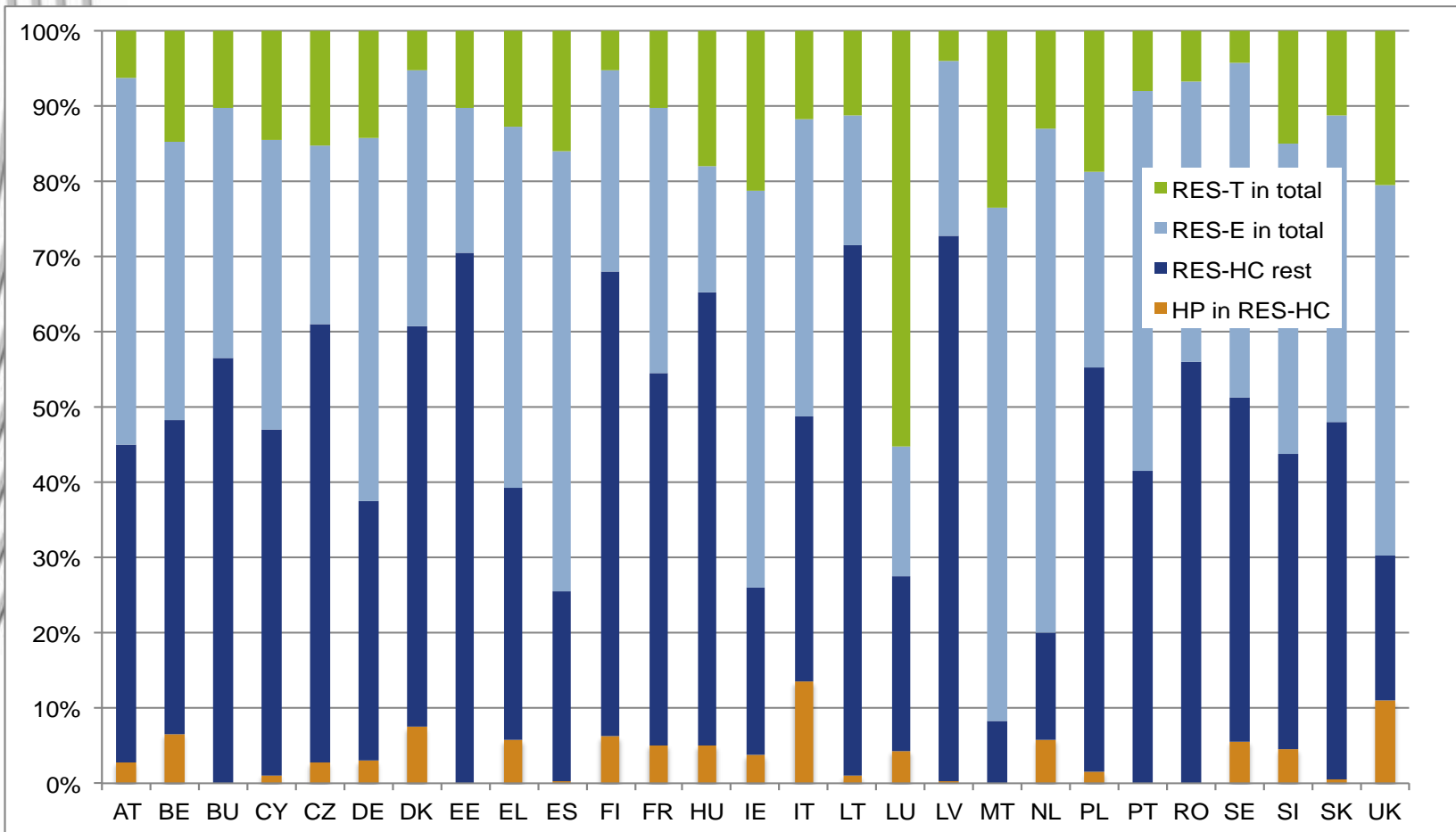


# Environmental impact in a nutshell

Accumulated values	2005-2009	2010	2011-2020	Total
<b>RES integration (TWh)</b>	23,68	5,47	109,93	<b>139,06</b>
<b>GHG emission savings (Mt)</b>	5,52	1,27	25,480	<b>32,27</b>
<b>Final Energy saved (TWh)</b>	29,73	6,87	138,09	<b>174,67</b>
<b>Primary energy saved (TWh)</b>	12,30	3,17	63,58	<b>79,05</b>
<b>Number of units sold (#)</b>	3 022 620	752 106	14 895 466	<b>18 670 192</b>

*slight deviation in totals, as not all heat pumps sold could be properly accounted for with regard to their environmental benefit*

# Heat pump recognition in the NREAPs



Source: NREAPs, own visualisation

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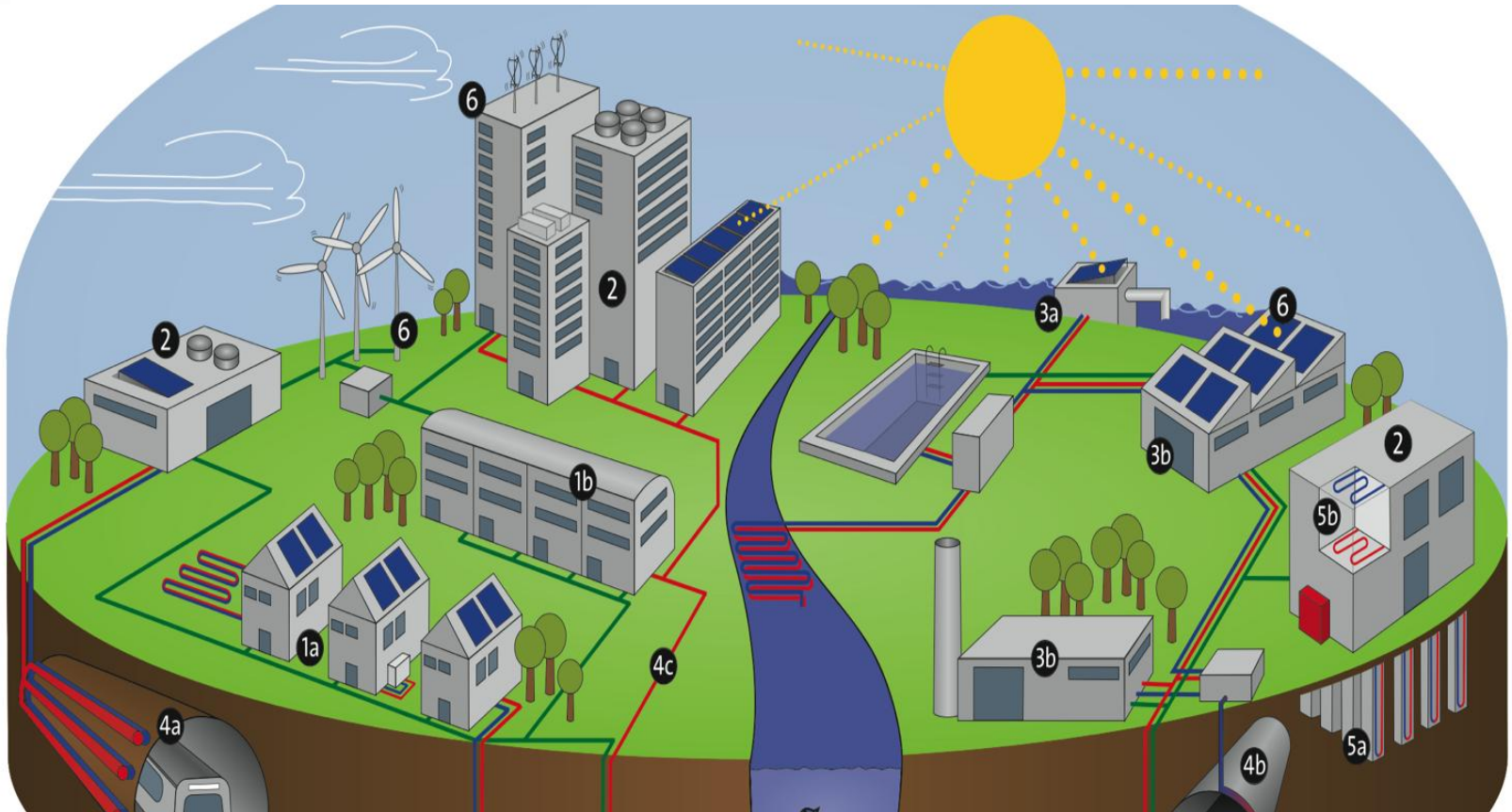
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# European Heat Pump Association Vision

- Establish **Heat Pumps** as a core technology for the efficient, reliable and cost effective provision of heating, cooling and hot water from renewable energy sources for residential, non-residential and industrial applications in all European countries

# The result: Future cities can will become heat pump cities!



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# The European Heat Pump Association

EHPA was established in the year 2000 to promote awareness and proper deployment of heat pump technology in the European market place for residential, commercial and industrial applications. EHPA aims to provide technical and economic input to European, national and local authorities in legislative, regulatory and energy efficiency matters. All activities are aimed at overcoming market barriers and dissemination of information in order to speed up market development of heat pumps for heating, cooling and hot water production.

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