

Solar Thermal Markets

On track for 2020?

Solar Panel meeting

Renewable and Cooling Platform – Annual Event

25 April 2012, Copenhagen

Robin Welling - ESTIF President



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Solar Thermal Market 2011/2012



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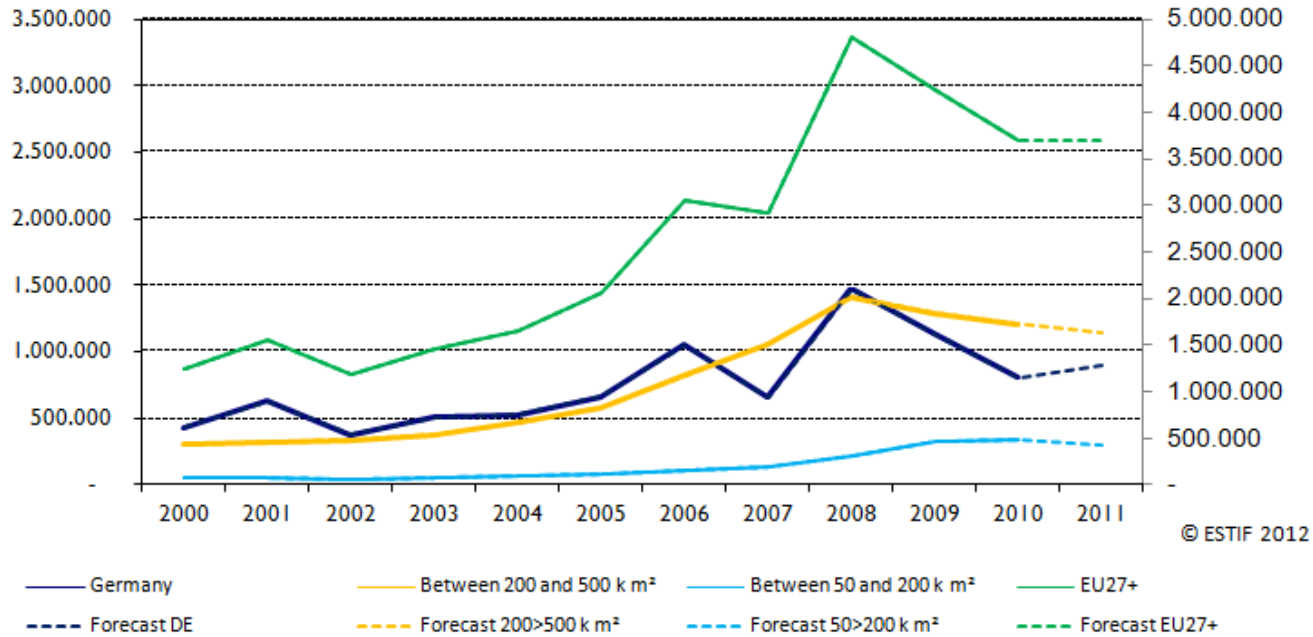
Market forecast 2011

kW_{th}

Solar Thermal Market in Europe

m²

Cumulative newly installed capacity for markets in the same size range



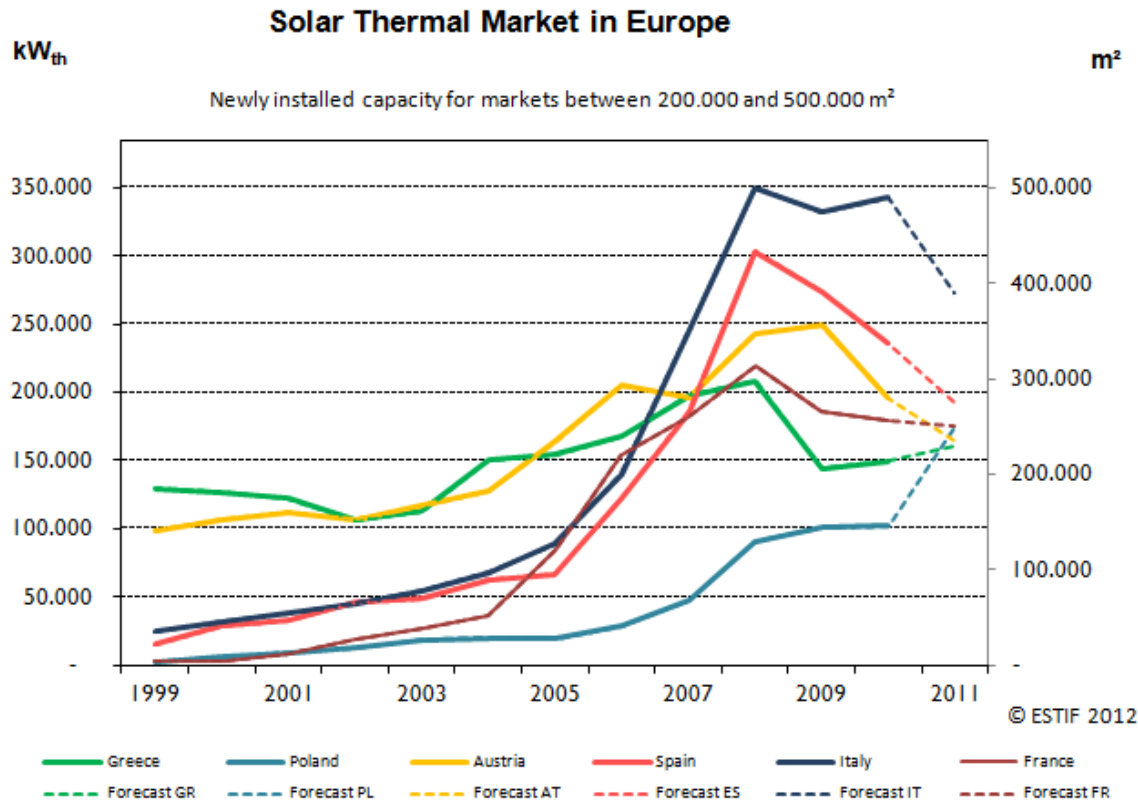
Market 2011 – Preliminary overview

- Official ESTIF market statistics only in June
- Overall the 2011 market is flat
- Main markets (except Germany) experience decrease
- Germany returns to growth (+ 11%)



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Forecast 2011 (Markets > 200 000 m²)



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Markets above 200 000 m²

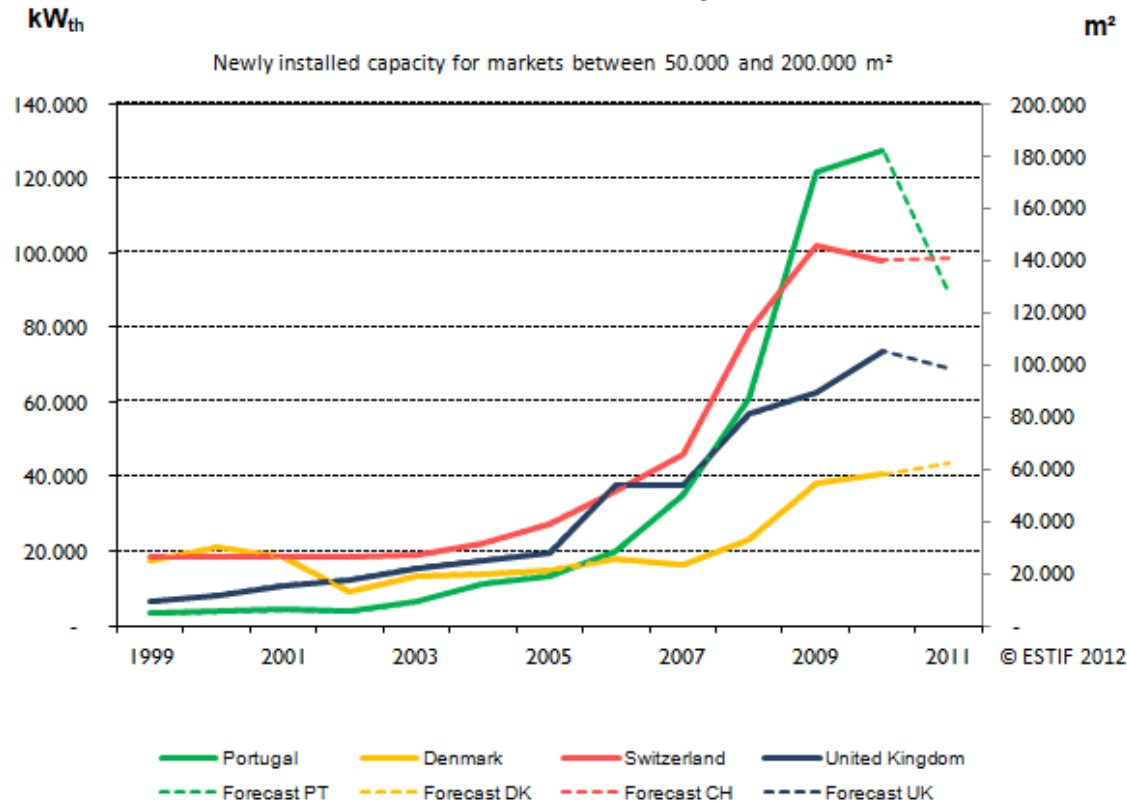
- Poland joins this group (Austria, France, Greece, Italy, Spain)
- All experiencing decreasing sales, except Poland
- Southern European countries hit strongly by crisis and political situation (cuts on subsidies and insecurity)
- Italy and Spain particularly worrying, uncertainties regarding support mechanisms



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Forecast 2011 (Markets > 50 000 m²)

Solar Thermal Market in Europe



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Emerging markets > 50k sq m2

- Markets slowing down, apart from Denmark (still strong on district heating with big projects to be implemented in 2012)
- Portugal and Czech Republic are examples of negative effects of 'go and stop' incentives policy
- UK further delays the implementation of Renewable Heat incentives for residential installations



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Market 2011 – Preliminary overview

| | 2010 | 2011 | 2011/2010 |
|------------------|------------------|------------------|--------------|
| Austria | 279.898 | 235.000 | -16,0% |
| Denmark | 58.100 | 62.400 | 7,4% |
| France | 256.000 | 251.000 | -2,0% |
| Germany | 1.150.000 | 1.275.000 | 10,9% |
| Greece | 214.000 | 230.000 | 7,5% |
| Italy | 490.000 | 390.000 | -20,4% |
| Poland | 145.906 | 248.000 | 70,0% |
| Portugal | 182.271 | 127.198 | -30,2% |
| Spain | 336.800 | 275.590 | -18,2% |
| Switzerland | 140.000 | 140.500 | 0,4% |
| United Kingdom | 105.200 | 98.500 | -6,4% |
| Sub-total | 3.358.175 | 3.333.188 | -0,7% |



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The first quarter of 2012?

- *Germany shows single digit growth and will even improve*
- *Austria started with some seasonal delay, but may recover*
- *France is stable*
- *UK will grow on commercial*
- *Italy is very weak but may recover later in 2012*
- *Spain is loosing again*
- *Belgium grows after subsidy confirmation*
- *Poland will grow but on extremely low price levels*
- *Portugal is loosing further due to VAT increase and full subsidy stop*
- *Greece will loose double digit growth in 2012*
- *Switzerland will be stable*
- *Denmark will grow and Scandinavia in general will improve*
- *Incentives in Romania, Baltic States*



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Wagner & Co/ESTIF

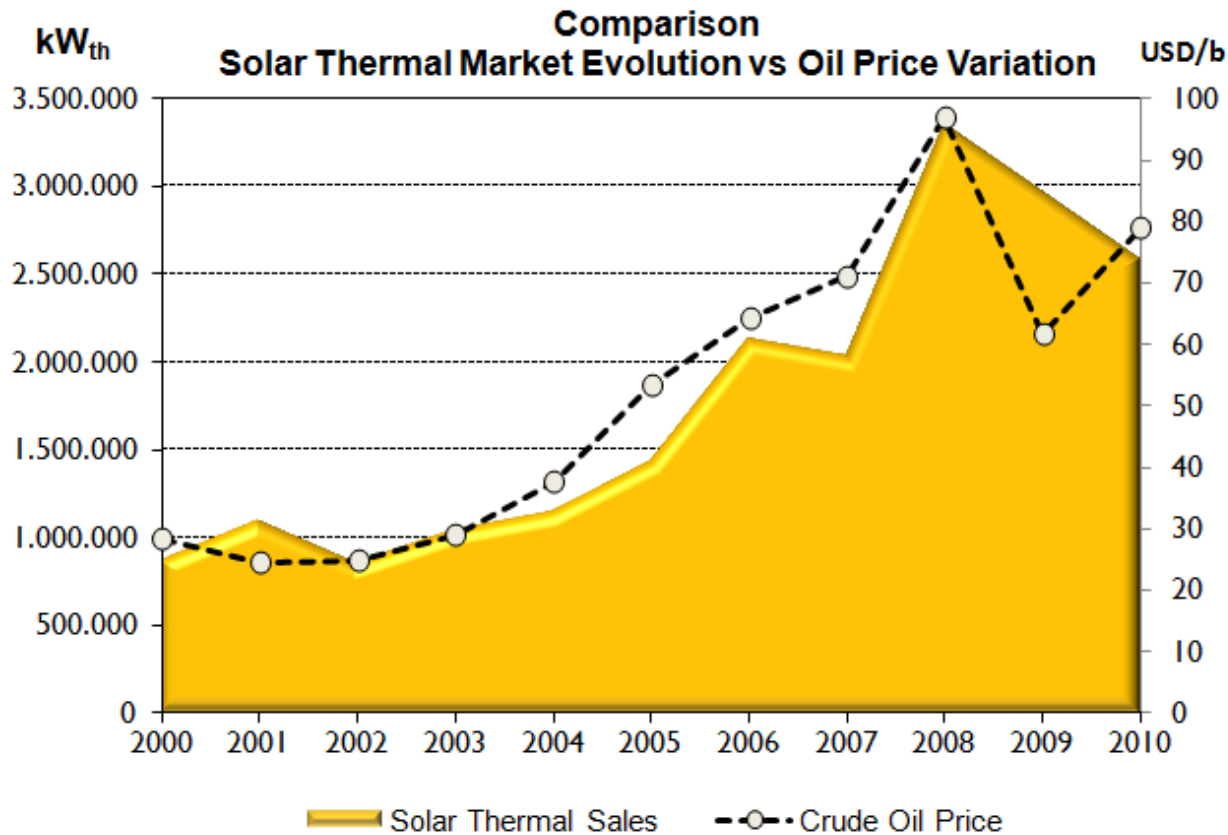
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The market drivers



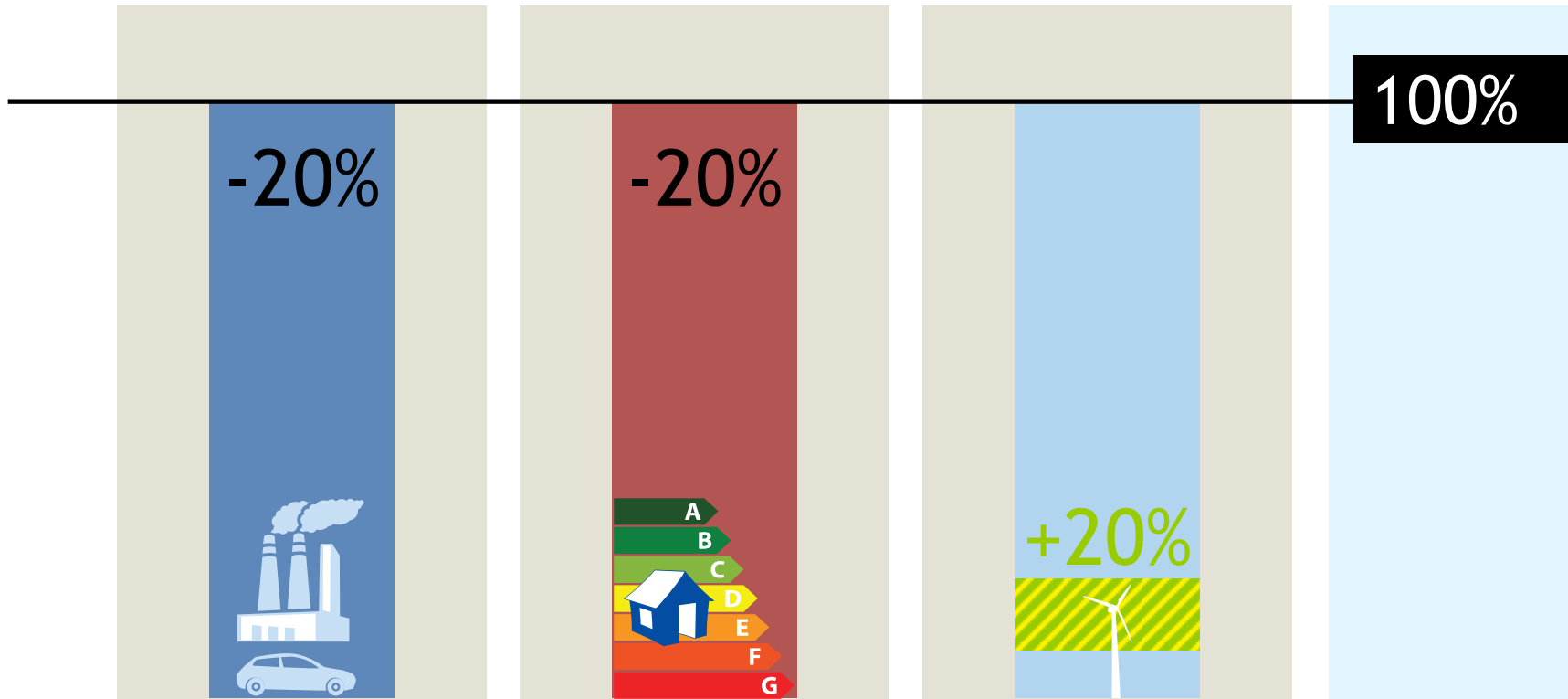
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The oil prices?



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20-20-20 EU policy and beyond...?



Greenhouse gas levels

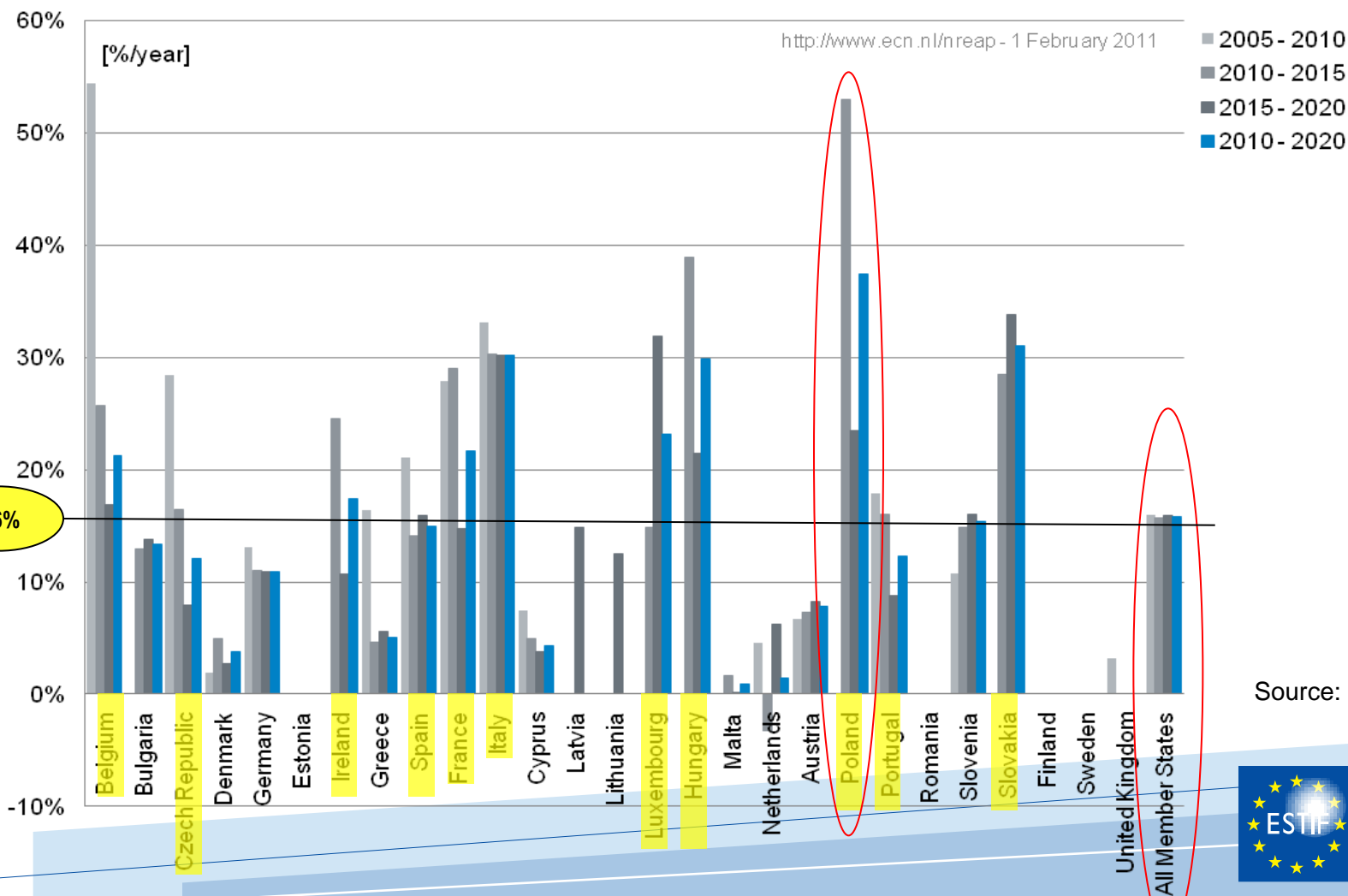
Energy consumption

Renewables in energy mix

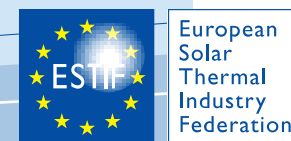


European Solar Thermal Industry Federation

Forecast of solar thermal growth according to the National Action Plans (5 years up to 2020)



Source: ECN, 2010



First interim reports for 2009/2010

- Market does not seem to reflect growth rates in the action plans
- Member states on target for the share of renewable energy sources
- Consolidated analysis for solar thermal in our yearly market report

The Renewables Energy Sources Directive (2009/28/EC)



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**Thank you for your
attention**



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