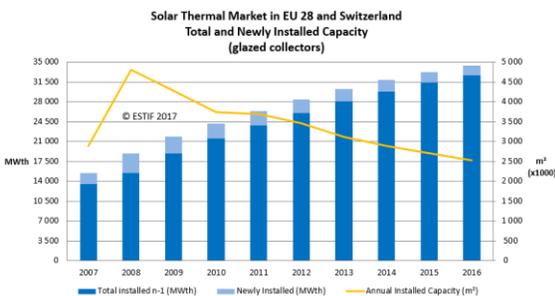




Preliminary Report

SOLAR THERMAL MARKETS IN EU 28 AND SWITZERLAND (GLAZED COLLECTORS)

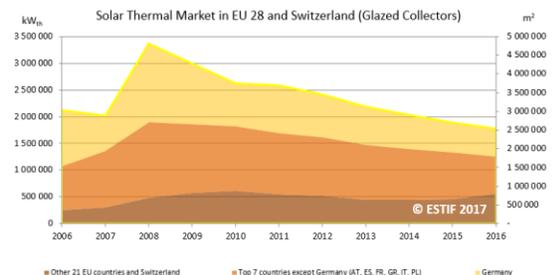
The preliminary data collection, covering the main European markets, indicates that in 2016, the newly installed capacity in Europe decreased, in comparison with 2015, by 6.4%.



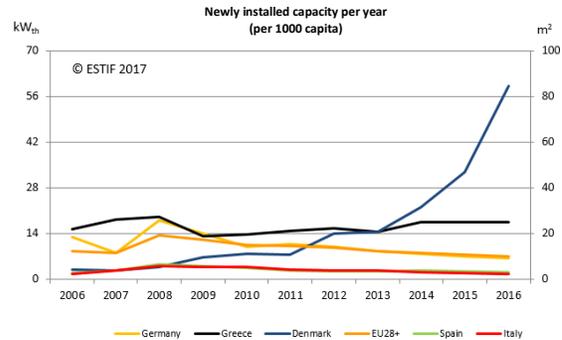
The annual sales totalled 1.8 GWth (approximately 2.5 million m²). The total capacity in operation increased to 34.4 GWth (49.2 mio m²), adding 1.2 GWth (+ 3.6%) to the total installed capacity by the end of 2015.

The preliminary market data covers over 80% of the European market. The referred year-on-year variation may still change by one percentage point, ranging between -5.4% and -7.4%.

The largest European market, Germany has faced a decreased of almost 8%, totalling 521 MWth (744 000 m²) confirming some earlier expectations regarding the limited impact of the MAP programme and other support schemes. In fact, it is considered that there is poor information on the existing support, which might also affect the interest of potential users. Still, the existing support schemes have helped to reduce the negative effect of other factors in the market, such as the competition coming from low fossil fuel costs, the competition from other RES, such as the use of solar PV for heating, the low modernisation rate for heating systems in general in the German market and installation bottlenecks, as installers prefer other works considered more interesting and profitable than solar thermal systems.



The main development was observed in Denmark, where the market grew by approximately 80%, reaching a new national record of 335 MWth (478 000 m²), due to a new increase in the number and size of solar district heating systems. As an example, a new record was attained with a new solar district heating plant of 110 MWth, coming into operation at the end of the year, more than doubling the size of the previous largest plant. Consequently, Denmark was the second largest market in Europe, just behind Germany. Considering the size of the country (5.6 million), it is a remarkable fact, reaching almost 85 m² (59 kWth) of newly installed capacity per 1000 inhabitants in 2016.



Greece, Spain and Italy complete the top five of solar thermal markets in terms of newly installed capacity. Out of these the only one that remained stable was Greece. Italy and Spain have decayed approximately 12% each. While in Spain this decrease is due to the slow uptake on new construction, where solar thermal is facing also increased competition, and to the lack of public support, in Italy, the support scheme put in place fails to produce effect, in part due to the lack of information about it in the market.

Market (Newly Installed)

2014	2015	2016	Annual Evolution of the Market
Total Glazed m²	Total Glazed m²	Total Glazed m²	Total Glazed %
2 895 752	2 704 711	2 532 820	-6.4%

In Operation

2016		Annual Evolution of the Total Installed Capacity
Total Glazed		Total Glazed
m²	kW(th)	kW(th)
49 186 531	34 430 572	3.6%

Note: special thanks to [solrico](#) for their cooperation in the collection and verification of some data taken into account in this report.