ESTIF

EUROPEAN
SOLAR THERMAL
INDUSTRY FEDERATION

SOLAR THERMAL

SOLAR THERMAL MARKETS IN EUROPE

(TRENDS AND MARKET STATISTICS 2003)

JUNE 2004

25% GROWTH IN 2003 AND MORE TO COME

GERMANY TAKES THE LEAD AGAIN

With a striking growth of 39%, the German market quickly recovered from the 2002 slump. Among the reasons for this are: the start of a new public awareness campaign, growing oil prices and the increase in the federal incentive program, with record application numbers in the second semester. Many of these are being installed in 2004, when the historical mark of 1 million m^2 could be reached.

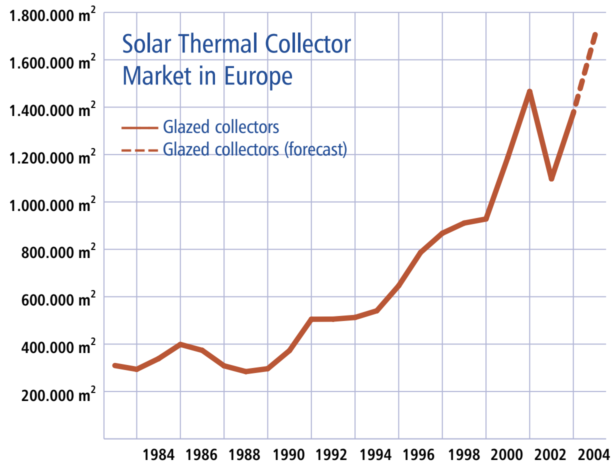
Also **Austria** and **Greece** resumed trends of growth. The dominance of the three largest markets remains unchallenged, though other countries are growing faster.

FRANCE IS STARTING TO CATCH UP

The support program **Plan Soleil** is helping France to a high and steady growth over the last few years. The French (metropolitan) market is still very small. But its 44% growth over 2002 proves that strong policies make a significant impact and allows for a positive forecast.

ITALY AND SPAIN STILL BELOW POTENTIAL

Italy and Spain still do not live up to their high potential for solar thermal. However, the solar regulations in many Spanish municipalities will have a positive impact in the coming years. In Italy, regions with better incentive schemes are growing over average.



THE SOLAR THERMAL MARKET IN EUROPE [1]

	In Operation[2]			Market (=Newly Installed)			Market Growth	Market Forecast
	2003	2001	2002	2003			2003/2002	2004
	Total Glazed m^2	Total Glazed m^2	Total Glazed m^2	Total Glazed m^2	*Flat Plate m^2*	*Vacuum Collectors m^2*	Total Glazed %	Total Glazed m^2
AT	1.921.594	160.080	153.050	166.920	*165.200*	*1.720*	9%	200.000
BE	35.874	4.481	4.943	9.047	*8.573*	*474*	83%	10.000
CH	324.954	22.730	26.431	27.022	*26.222*	*800*	2%	28.000
DE	4.898.000	900.000	540.000	750.000	*673.500*	*76.500*	39%	1.000.000
DK	299.890	26.150	13.000	19.000	*19.000*	*0*	46%	20.000
ES	341.566	46.357	66.000	70.000			6%	80.000
FI	10.030	1.110	1.110	2.000	*2.000*	*0*	80%	2.000
FR (metropolitan)	237.400	12.000	27.000	38.900	*38.900*	*0*	44%	52.500
GR	2.779.200	175.000	152.000	161.000	*161.000*	*0*	6%	180.000
IE	4.405	270	500	650			30%	800
IT	398.785	44.500	45.000	50.000	*44.900*	*5.100*	11%	55.000
NL	263.737	30.537	30.000	33.000	*33.000*	*0*	10%	20.000
PT	160.640	6.000	5.500	6.000	*6.000*	*0*	9%	7.000
SE	173.661	21.970	15.260	19.255	*17.966*	*1.289*	26%	25.000
UK	149.920	15.230	17.500	22.000			26%	26.000
SUM	11.999.656	1.466.415	1.097.294	1.374.794	*1.288.911*	*85.883*	25%	1.706.300

1- This document covers EU15 plus Switzerland - but without Luxemburg

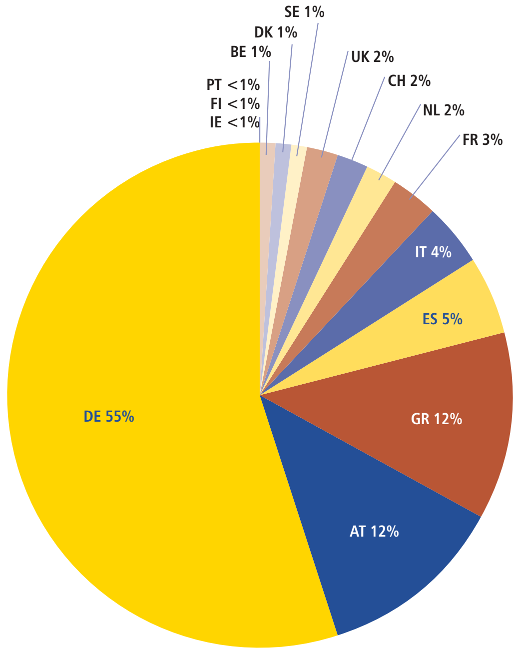
2- The collector area in operation is calculated assuming an average lifetime of 20 years (15 years for systems installed until 1989). Most current systems are designed to work longer than that, but individual systems can have a shorter lifetime, for several reasons: demolition or change of use of the building, poor installation or maintenance of the system.

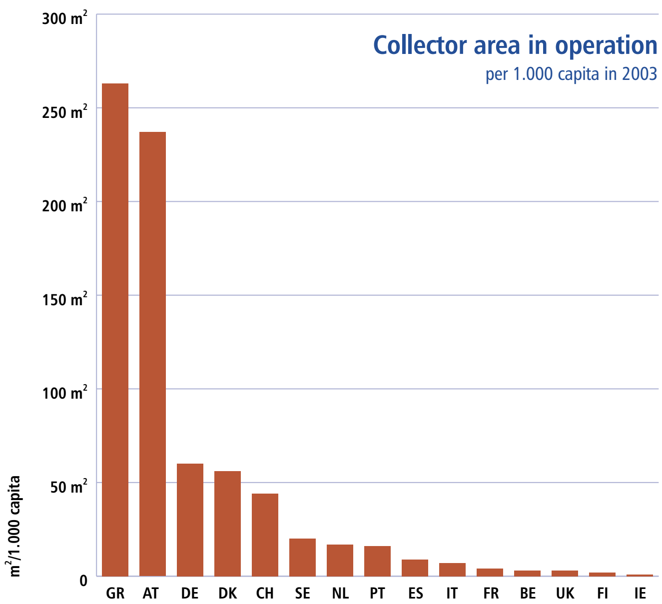
THE EU TARGET CAN BE REACHED, IF MORE COUNTRIES FOLLOW THE FRONTRUNNERS

80% of the EU market is still concentrated in 3 countries only. The EU target for 2010 of 100 millions m^2 corresponds to 264 m^2/1000 inhabitants. Greece has already achieved this; Austria is on the way to reach it well before 2010. While some of the countries lagging behind are starting to catch up, Europe needs stronger and more comprehensive policies to make sure that the target is reached at least by 2015.

Share of European solar thermal market

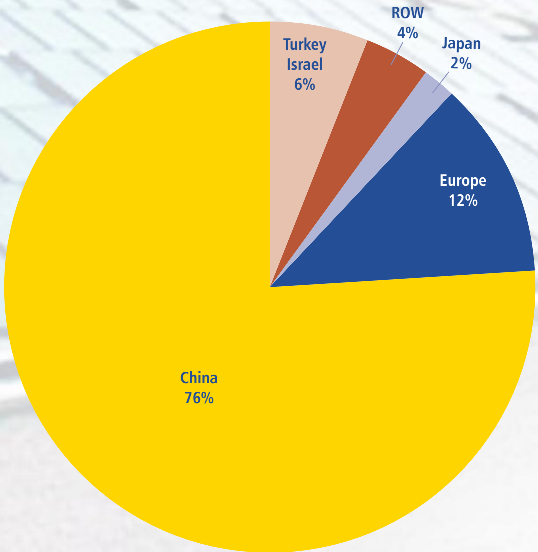
(newly installed collector area in 2003)





SOLAR THERMAL

Distribution of solar thermal market world wide
(newly installed collector area in 2002)



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ESTIF - THE VOICE OF THE EUROPEAN SOLAR THERMAL INDUSTRY

The European Solar Thermal Industry Federation represents over 50 manufacturers, service providers and associations active in the solar thermal sector. ESTIF is a founding member of the European Renewable Energy Council (EREC) and shares its head-quarters in the heart of the EU area in Brussels.

Some of the objectives of ESTIF are:

- To promote solar thermal policies able to drive the EU towards reaching its target of 100 million m^2 in operation
- To create an open and large solar thermal market by abolishing any technical or trade barriers and promoting harmonised standards and certification procedures
- To enhance EU initiatives aimed at the integration of solar thermal in the built environment
- To support its members when dealing with EU institutions programs and policies concerning solar thermal issues
- To regularly provide its members with insider information on solar thermal issues
- To organise European-level solar thermal events, such as the estec2005

estec2005 - EUROPEAN SOLAR THERMAL ENERGY CONFERENCE

Freiburg (Germany) - 21-22 June 2005
organised by ESTIF in collaboration
with BSi and Intersolar 2005
www.estec2005.org

estec 2005

ESTIF

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