State of the installed stock of heating systems

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EHI brings together manufacturers of heating systems in Europe

Our members represent 90% of EU market for heat & hot water generation, covering a wide range of technologies
Installed stock of heaters in the EU 27 across the years

Year 2015
101.5 Mio space heaters
69% inefficient, > 70 mio

Year 2017
103.4 mio space heaters
63% inefficient, > 65 mio

Year 2019
105.7 mio space heaters
58% old & inefficient, > 61 million

Replacement too slow (4%/year) → at least 6% needed for 2030
Diversity of the installed stock of heaters in EU Member States

- **Gas non-condensing boilers**: 42%
- **Gas condensing boilers**: 26%
- **Oil non-condensing boilers**: 18%
- **Oil condensing boilers**: 2%
- **Biomass**: 3%
- **Heat pumps**: 8%
- **Others**: 1%

France
- **Gas non-condensing boilers**: 58%
- **Oil non-condensing boilers**: 10%
- **Gas condensing boilers**: 30%
- **Heat pumps**: 1%
- **Biomass**: 1%
- **Others**: 1%

Italy
- **Gas non-condensing boilers**: 31%
- **Oil non-condensing boilers**: 23%
- **Gas condensing boilers**: 25%
- **Heat pumps**: 0%
- **Biomass**: 5%
- **Others**: 1%
- **Other solid fuels**: 32%

Poland
- **Gas non-condensing boilers**: 31%
- **Oil non-condensing boilers**: 4%
- **Gas condensing boilers**: 42%
- **Heat pumps**: 8%
- **Biomass**: 5%
- **Others**: 1%

Germany
- **Gas non-condensing boilers**: 33%
- **Oil non-condensing boilers**: 8%
- **Gas condensing boilers**: 1%
- **Heat pumps**: 62%
- **Biomass**: 12%
- **Others**: 17%

Efficient and renewable heating

Inefficient and non-renewable heating

*Source: EHI, stock 2019*
Some of the challenges to a faster replacement rate:

1. **Low consumer awareness** of energy efficiency & their appliance;
2. **Capacity/capability** e.g.: lack of installers to handle a 'renovation wave'; installers' skills update;
3. **Financial** e.g.: upfront investments & energy prices for end-users.
4. **Poor energy performance** of buildings: most built before 1960s, when no EPB standards.
Focus on consumer awareness

Recent CenterData study on purchase decisions on heating appliances (Oct 2021, 5 EU countries: DE, FR, IT, BG, PL)

- **Energy Label** is perceived as more informative rather than being used as a comparison tool;

- **Installers** seem to play an important role in increasing understanding of the label;

- **Specifics of building** determines choice of an appliances versus another;

- Only 8% of recent buyers replaced a boiler with e.g. a heat pump;

- With costs, energy performance is the most important aspect for consumers, but shows limited switching to more efficient technologies.
HARP was conceived as a tool to raise consumer AND installers awareness about the efficiency of heating systems installed.

Knowledge is power: knowing the efficiency of your (old) heating system is the first step to improve it.
Thank you for your attention!

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