

State of the installed stock of heating systems



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Secretary General of EHI**

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EHI brings together manufacturers of heating systems in Europe

SPACE HEATING WATER HEATING CONTROLS EMITTERS



125 000
people employed
directly by the industry

1 billion €
yearly investments in RDI

28.5 billion €
turnover / year

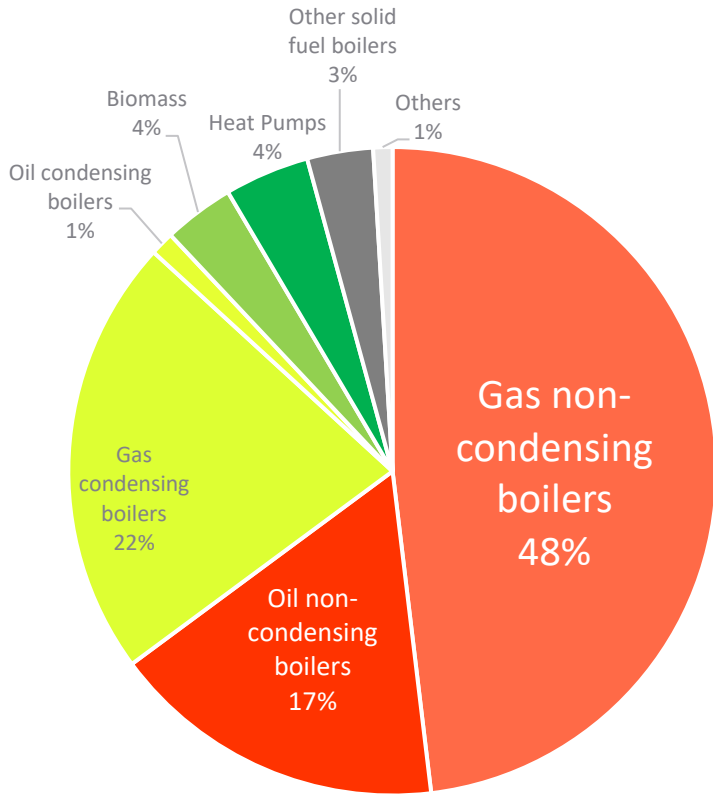


Our members represent 90% of EU market for heat & hot water generation, covering a wide range of technologies

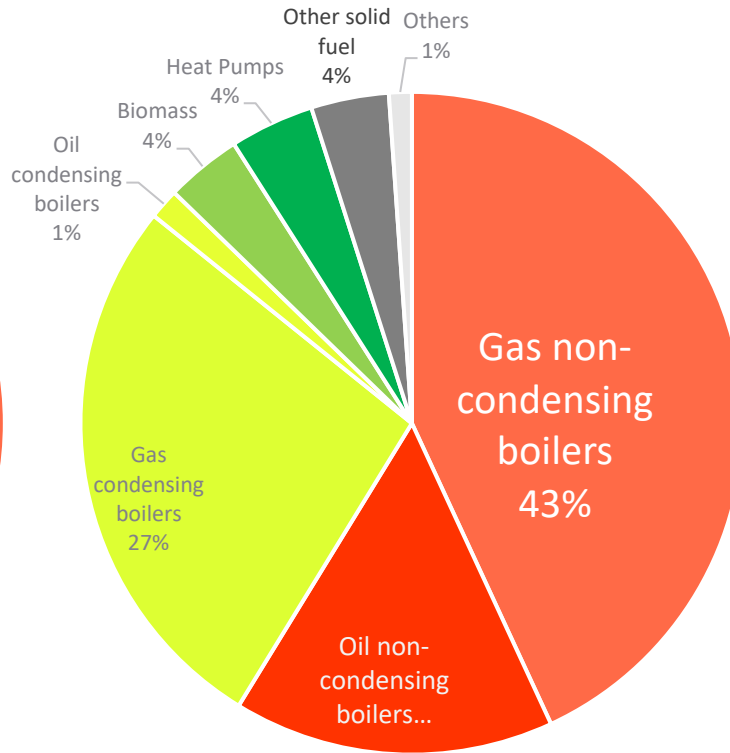
Installed stock of heaters in the EU 27 across the years



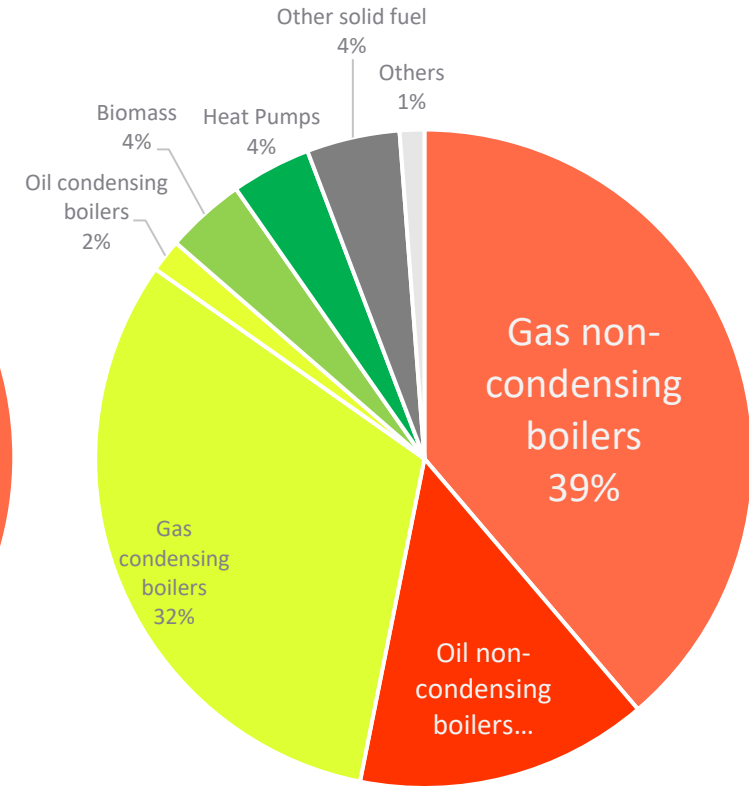
Source: EHI.
Colours based on the energy label for new heaters.



Year 2015
101,5 Mio space heaters
69 % inefficient, > 70 mio



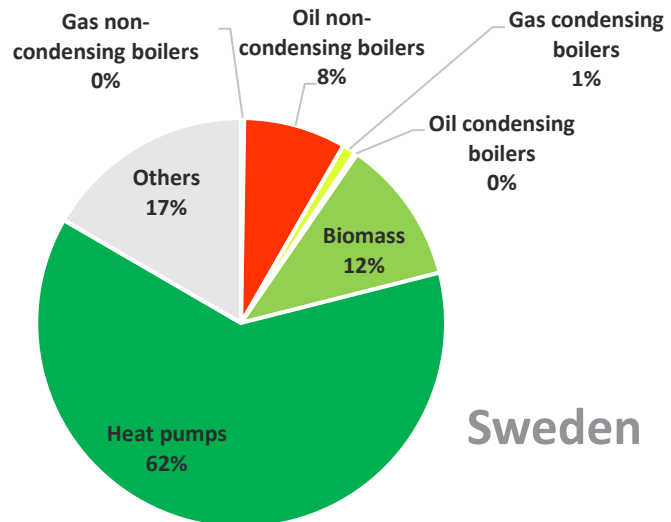
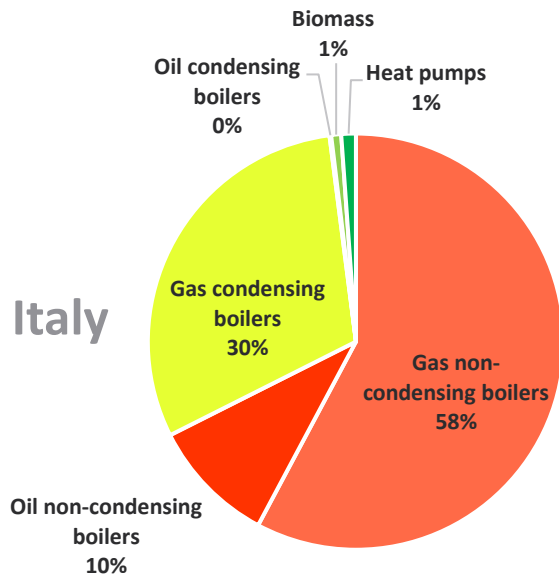
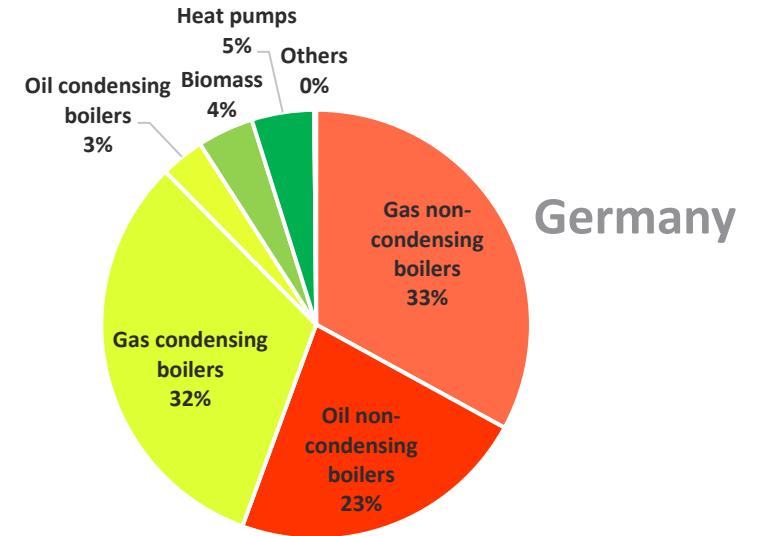
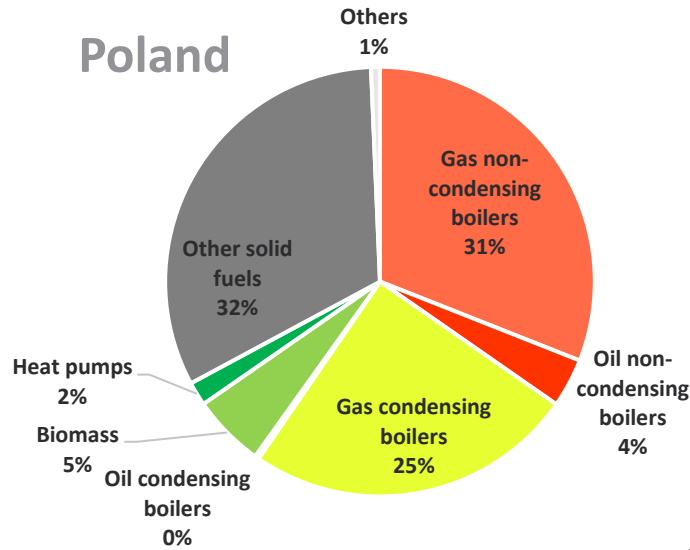
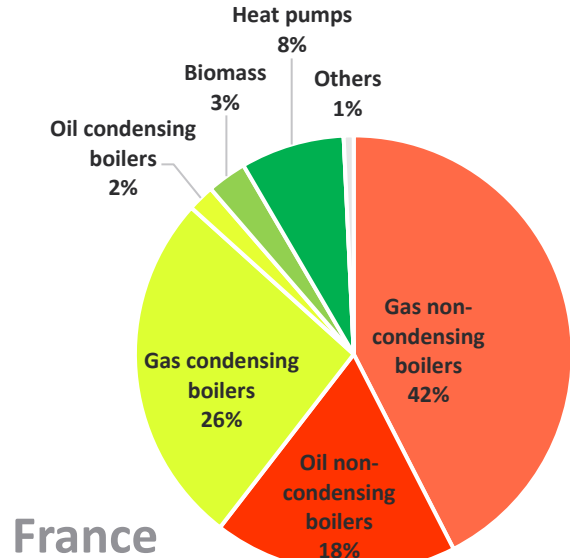
Year 2017
103,4 mio space heaters
63 % inefficient, > 65 mio



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



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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