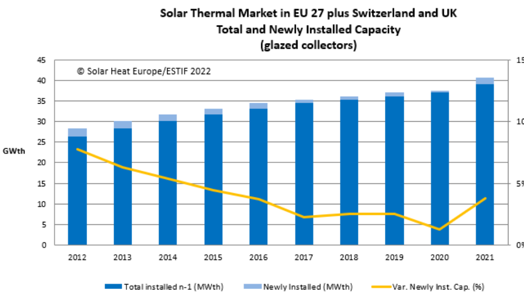
Preliminary Report 2021
SOLAR HEAT MARKETS IN EU27, Switzerland and United Kingdom

The preliminary data collection, covering the top ten European markets in 2021, indicates that the newly installed capacity in Europe increase by 11.9% in those markets.



The total annual sales in the referred **top ten countries** totalled 1.33 GWth (approximately 1.9 million m²), representing an increase of 11.9% of year-on-year sales.

As a result, we can expect the sales for the entire market to amount to 1.49 GWth (2.1 million m²), which would represent an increase of 10.8%.

The total capacity in operation is expected to increase to 39 GWth (55.9 million m²), adding 1.49 GWth (+ 4%) to the existing total installed capacity by the end of 2021.

The preliminary market data covers approximately 89% of the European market. The referred variation may change by plus or minus one percentage point (-1% to +1%).

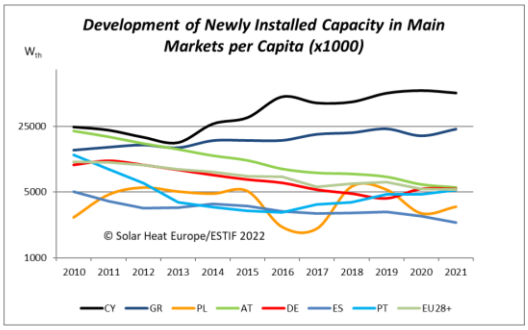
The analysis of the sales of solar heating systems in Europe in 2021 is directly related to the support measures the main countries adopted for the energy transition.

Half of the top 10 markets in Europe had a double-digit growth: Italy (+85%), Portugal (+22%), Poland, and Greece (+17%); while France reached a triple-digit growth (+130%).

In Italy, Portugal, and France, support measures that benefit solar thermal are behind this larger increase. Italy has an ambitious target of renovating the old heating stock, giving 110% reimbursement on renovations that increase the energy class of the house of two levels. With the substantial growth in 2020, now Italy reaches the podium of the largest European solar thermal markets.

In the case of France, the market growth is driven by the development of "territorial target contracts", where all regions have to agree on reaching targets in renewable energy share including Solar Thermal. Portugal benefits from a program for increasing energy efficiency and renewable energy in residential.

Germany remains the largest European market. After impressive growth in 2020 (+26%), this market remained stable in 2021, totalling 448 MWth (640 000 m²).



On the other side, other large markets, such as Poland and Greece had a consistent growth, almost reaching +20%. In particular the Polish market was able to surpass the Spanish one that had a sensible decrease due to the newly established policies favouring PV and Heat Pumps.

Besides Spain, other traditional solar thermal markets , such as Austria and Cyprus, have also faced a decrease on year-on-year sales.

Newly Installed Capacity 2021

	2020	2021	Variation	Comment
Germany	643,500	640,000	-0.5%	Final (BSW)
Greece	304,500	359,000	17.9%	Final (EBHE)
Italy	122,000	225,000	84.4%	Final (ANIMA)
Poland	161,100	189,100	17.4%	Final (SPiUG)
Spain	187,500	158,300	-15.6%	Final (ASIT)
France	34,000	78,280	130.2%	STW
Portugal	63,107	77,045	22.1%	Final (AFIQ)
Cyprus	74,613	70,360	-5.7%	Final (EBHEK)
Austria	76,060	70,700	-7.0%	Final (AEE)
Netherlands	32,750	32,750	0.0%	Final (Holland Solar)
Subtotal Top 10	***1,699,130***	***1,900,535***	***11.9%***	***89% of total market***
Other countries	224,417	231,149	3.0%	Assumption
Total ALL	**1,923,547**	**2,131,684**	10.8%	

Note: This preliminary report, developed only for information of Solar Heat Europe/ESTIF members, precedes a more detailed report to be published in October 2022. It includes only data related to glazed collectors. The data was collected from 10 main European markets, covering 89% of the 2021 market. For several of the countries indicated the data is final, while for other it is a preliminary indication, subject to change.