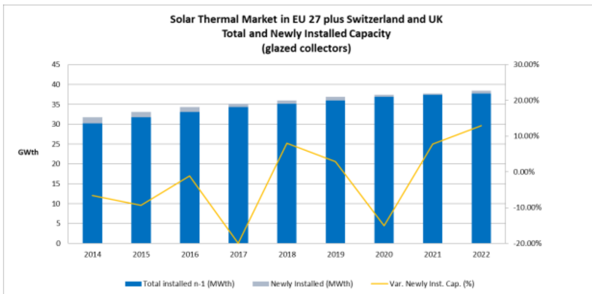
Preliminary Report 2022
SOLAR HEAT MARKETS IN EU27, Switzerland and United Kingdom

The preliminary data collection, covering the top European markets in 2022, indicates that the newly installed capacity in Europe increased by 14.1% in those markets.



The total annual sales in the referred **top ten countries** totalled 1.52 GWth (approximately 2.2 million m²), representing an increase of 14.1% of year-on-year sales.

As a result, we can expect the sales for the entire market to amount to 1.61 GWth (2.3 million m²), representing an increase of 10%.

The total capacity in operation is expected to increase to 39 GWth (55 million m²), adding 1.61 GWth to the existing total installed capacity by the end of 2022.

The preliminary market data covers approximately 92% of the European market. The referred variation may change by plus or minus one percentage point (-1% to +1%).

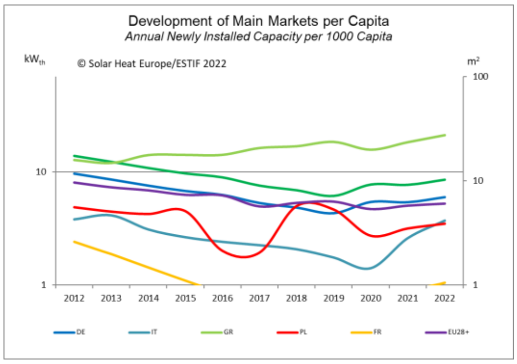
The analysis of the sales of solar heating systems in Europe in 2022 is directly related to the support measures the main countries adopted for the energy transition.

The four biggest markets in Europe had a double-digit growth: Germany (+10.9%), Greece (+16.7%), Italy (+43%), and other countries like Poland (+11.1%) and France (+35.6%), continue a steady growth reaching closer to the podium.

In Italy, Greece, and France, support measures that benefit solar thermal are behind this larger increase. In France subsidy schemes are increasing both small scale and large scale markets (the large scale one growing after almost a decade). With the substantial growth in the past years, France could be soon one the largest European solar thermal market.

In the case of Germany, after a year of stagnation in 2021, we see the willingness of the population to phase out old and inefficient heating appliances. This creates a positive domino effect that increases the growth of the overall European market.

Germany remains the largest European market, totalling 497 MWth (710 000 m²).



Other large markets, such as Poland and Italy had a consistent growth. In particular the Polish market consolidated its position in front of the Spanish one that had a slight decrease.

Positive news come also from smaller markets like Belgium and Cyprus, that after some negative years see again a substantial growth, with Belgium surpassing double digits with a +11.4%.

Another new big increase comes from the Netherlands, that thanks to a new grant for small scale and large scale installations sees a growth of +37.5% compared to the year before.

On the other hand, Spain and Portugal, markets that have been more resilient over recent years, have now faced a decrease. This is in large part related to policies strongly supporting other technologies, such as PV and/or heat pumps.

Newly Installed Capacity 2022

	2021	2022	Variation	Comment
Germany	640,000	710,000	10.9%	Final (BSW)
Greece	359,000	419,000	16.7%	Final (EBHE)
Italy	225,000	321,750	43.0%	Final (Solterm Italia)
Poland	189,100	210,000	11.1%	Final (SPiUG)
Spain	150,500	145,500	-3.3%	Final (ASIT)
France	78,280	106,175	35.6%	Final (ENERPLAN)
Netherland	30,609	42,097	37.5%	Final (Holland Solar)
Portugal	77,045	68,565	-11.0%	Final (AFIQ)
Cyprus	70,360	73,924	5.1%	Final (EBHEK)
Austria	70,700	59,888	-15.3%	Final (AEE)
Belgium	16,600	18,500	11.4%	Final (ATTB)
Subtotal	***1,907,194***	***2,175,399***	***14.1%***	***Over 90% of total market***
Other countries	168,378	175,113	**4.0%**	**Assumption**
Total ALL	**2,131,684**	**2,350,512**	10.3%	

Note: This preliminary report, developed only for information of Solar Heat Europe/ESTIF members, precedes a more detailed report to be published in October 2023. It includes only data related to glazed collectors. The data was collected from the main European markets, covering 92% of the 2022 market. For several of the countries indicated the data is final, while for others it is a preliminary indication, subject to change.