

2005 Solar Thermal Barometer

Solar thermal market growth continued to be positive in 2004 (+10.1% with respect to 2003). The annual installation rate (1 693 004 m², i.e. the equivalent of 1 185 MWth), however, is still insufficient to reach European Commission objectives of 100 million m² (70 000 MWth) by the end of 2010. EurObserv'ER presents the sector's current state of development in its Barometer published in issue 168 of *Systèmes Solaires*.

1 693 004 m² installed in 2004

European Union expansion from 15 to 25 members on May 1st 2004 helped the EU countries set a new production record and finally surpass the installation level achieved in 2001 (1 693 004 m² in 2004 vs. 1 537 070 m² in 2003). While these figures may appear quite sizeable, they still only represent a modest world market share (approximately 10%). China alone represents a market of more than 10 000 000 m² per year (more than 7 000 MWth).

Market and total capacity of solar thermal collectors installed in the European Union in 2003 and 2004 (in m²)

Countries	2003 market	2004 market	2004 total installed capacity
Germany	750 000	780 000	6 199 000
Greece	161 000	215 000	2 826 700
Austria	176 820	191 494	2 399 791
France	97 628	116 915	792 500
Netherlands	49 686	58 304	503 829
Italy	55 100	55 000	457 711
Cyprus	30 000	30 000	450 200
Spain	83 272	90 000	440 151
Other countries	133 564	156 291	1 291 942
25-member EU total	1 537 070	1 693 004	15 361 824

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German market growth rate drops

In spite of low growth (+4% with respect to 2003), Germany remained the leading solar thermal market in the EU in 2004 with a 46.1% market share, i.e. 780 000 m² of solar thermal collectors. Greece once again became the second biggest EU market in 2004 with an additional installed capacity of 215 000 m². Austria is in third place with a newly installed surface capacity of 191 494 m².

France had a buoyant solar thermal collector installation rate in 2004 (+ 19.8% with respect to 2003). France installed 116 915 m² during the last year, including 55 375 m² in French overseas departments.

Europe counts 15 million m² installed surface

The Campaign for Take-Off target was finally reached, one year late, with a total installed surface for the 25-member EU of 15 361 824 m². The contribution of the ten new member countries helped achieve this result, with an additional installed surface of 820 267 m².

In terms of individual countries, Germany has the largest total installed surface capacity with 6 199 000 m². Greece remained the second biggest installed capacity among the EU countries in 2004 with 2 826 700 m² ahead of Austria with a total installed solar thermal surface of 2 399 791 m².

Solar thermal industry

Taken as a whole, the European market represented more than 1 billion euros turnover in 2004, with three quarters of this amount coming from the three main markets cited above. In 2004, the number of jobs created by this market is estimated at 18 700, a 17% increase with respect to 2003.

Table underneath presents an overview of the principal players present on the European solar thermal market and this in their different fields of competences. It is not possible to make comparisons between all of the presented production figures because they represent different industry segments (absorber production, collector production, sale of complete solar systems).

Main companies of the European Union thermal solar sector in 2004 (in tons)

Companies	Countries	Type of technologies	Production or sales (in m²)
Buderus/BBT Thermotechnik GmbH	Germany	Heating system provider (including solar systems)	95 000*
Viessmann	Germany	Heating system provider (including solar systems)	115 000*
Ritter Solar	Germany	Vacuum collectors	40 000
Wagner Solartechnik	Germany	Flat glazed and vacuum collectors	85 000
Sonnenkraft	Austria	Flat glazed and vacuum collectors	100 000
GreenOneTec	Austria	Flat glazed collector, vacuum collector and absorbers	242 000 (incl. 12 000 vacuum collectors)
Clipsol	France	Glazed and unglazed, collectors	12 000
FOCO SA	Greece	Flat glazed collectors	110 000
Thermomax	North Ireland	Vacuum collectors	50 000*
Sunstrip AP	Sweden	Absorbers	85 000

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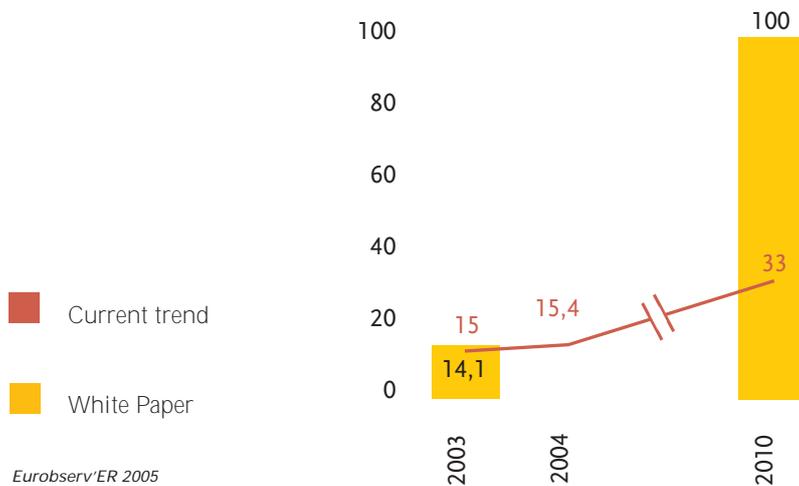
* 2003 Data

White Paper inaccessible

Even though it has grown for the third year in a row, the solar thermal sector is not currently growing at the rate needed to reach to reach European Commission objectives. This situation is due to the fact that only a minority of countries are supporting the European market. Germany, Austria, Greece and a very active Cyprus provide 77.3% of Europe's installed solar thermal capacity while representing only 22.5% of total EU population. These countries can't keep pushing European growth all by themselves indefinitely.

Consequently, these different trends have led us to estimate total EU installed surface capacity at 33 million m², i.e. one third of White Paper objectives (graph underneath).

Comparison of present trend with European Union Objectives (in million of m²)



EurObserv'ER

EurObserv'ER is a consortium composed of six European organisations devoted to the promotion of renewable energies within the European Union.

These six organisations are :

- **Observ'ER**, the Observatory of renewable energies (Paris, France);
- **Eurec Agency**, the European association of renewable energy research centers (Brussels, Belgium);
- **Eufores**, European forum for renewable energy sources (Brussels, Belgium);
- **Erec**, The European Renewable Energy Council (Brussels, Belgium);
- **Jozef Stefan Institute**, Energy Efficiency Centre (Ljubljana, Slovenia);
- **Systèmes Solaires**, the French Magazine about renewable energies (Paris, France).

The EurObserv'ER barometer

The **EurObserv'ER barometer** consists of regular publication in the European press of indicators reflecting the current dynamics of renewable energy sectors (solar, wind, hydraulic, geothermal and biomass) worldwide and within the European Union.

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