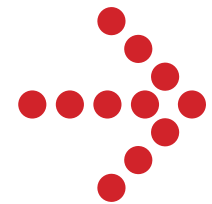


World Plumbing Council

European framework and solutions of the heating industry

Andreas Lücke, Senior Expert, Federation of German Heating Industry

March 15, 2023, Frankfurt



BDH
Bundesverband der
Deutschen Heizungsindustrie

BDH – Federation of German Heating Industry



BDH

Federation of
German Heating Industry

Members

121

companies
and 2 associations



Revenue

worldwide

21.9 billion €

+14.7 %



Employees

worldwide

87,000

+7.1 %



R&D

worldwide

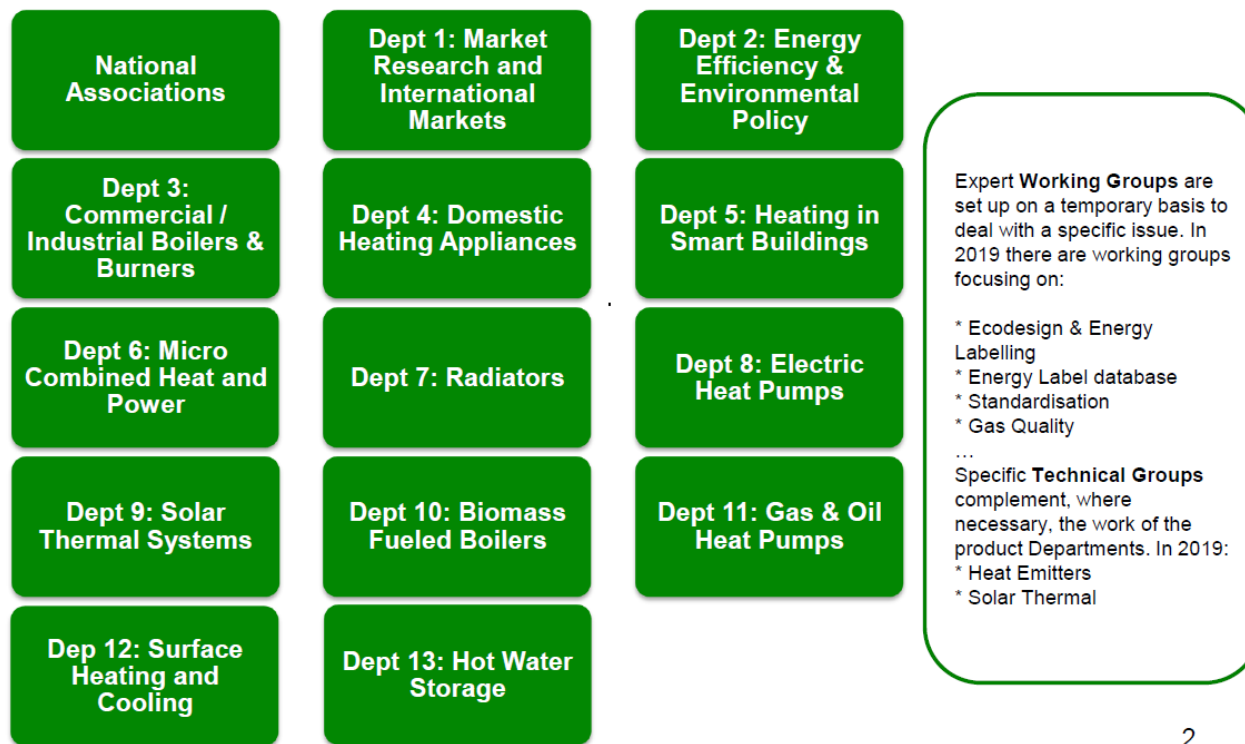
854 million €

+6.5 %



2022

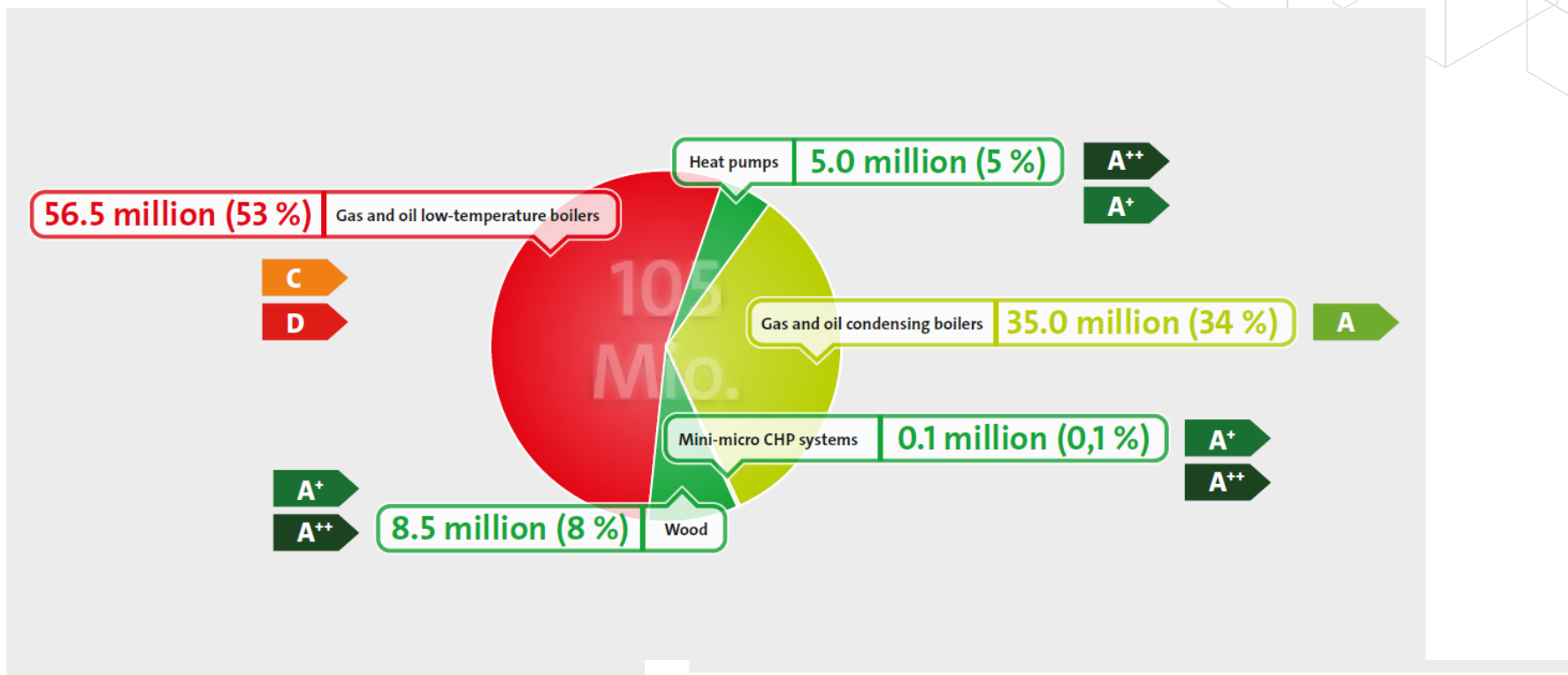
Association of the European Heating Industrie (EHI)



2

ehi
association of the
European Heating Industry

105 million heating systems installed in the EU



Source: BDH, Association of the European Heating Industry (EHI)

European framework for the heating sector

- REPower-EU
- Energy performance of buildings directive (EPBD)
- Renewable energy directive (RED)
- EU Emissions Trading System



Market development Germany 2022

Marktentwicklung 2022

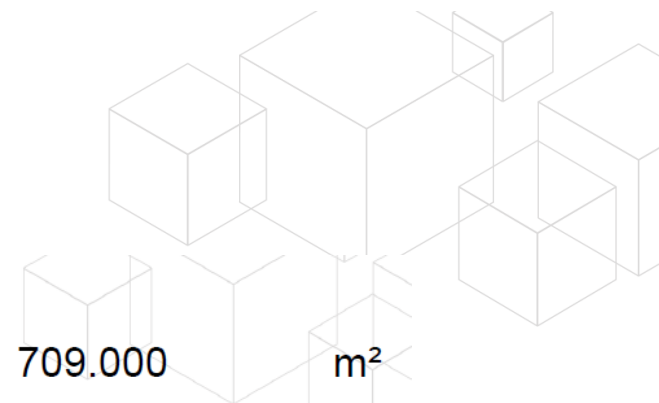
→ Gesamtmarkt Wärmeerzeuger	+	5 %	980.000	Stück
→ Wärmeerzeuger (Gas)	-	8 %	598.500	Stück
→ Gas-Brennwert	-	8 %	528.500	Stück
→ Gas-NT	-	13 %	70.000	Stück
→ Wärmeerzeuger (Öl)	+	25 %	56.500	Stück
→ Öl-Brennwert	+	26 %	54.000	Stück
→ Öl-NT	+	4 %	2.500	Stück
→ Biomasse	+	17 %	89.000	Stück
→ Scheitholz	-	4 %	9.500	Stück
→ Pellet	+	22 %	64.500	Stück
→ Kombi-Kessel	+	13 %	7.000	Stück
→ Hackschnitzel	+	10 %	8.000	Stück
→ Heizungs-Wärmepumpen	+	53 %	236.000	Stück
→ Luft-Wasser	+	61 %	205.000	Stück
→ Sole-Wasser	+	2 %	23.500	Stück
→ Wasser-Wasser und sonstige	+	84 %	7.500	Stück
Hybrid-Wärmepumpen ¹	+	102 %	11.000	Stück



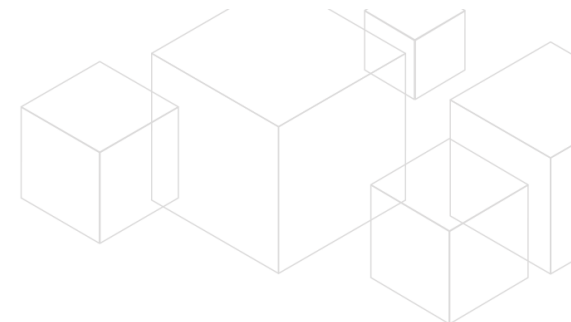
Market development Germany 2022

Marktentwicklung 2022

→ Solarthermie	+ 11 %	709.000	m²
→ Speicher	+ 6 %	756.500	Stück
→ Frischwasserstationen	+ 9 %	80.000	Stück
→ Trinkwasser-Wärmepumpe	+ 93 %	45.500	Stück
→ Tanksysteme	+ 16 %	35.500	Stück
→ KWK	- 16 %	6.000	Stück
→ Flächenheizung/-kühlung	+ 4 %	286.0	Mio. m
→ Heizkörper	- 19 %	3.7	Mio. Stück
→ Lüftung (Zentral mit WRG)	- 5 %	49.000	Geräte
→ Lüftung (Dezentral mit WRG)	+ 4 %	255.000	Geräte
→ Abgas (Edelstahl)	+ 45 %	209.2	Mio. Euro
→ Brenner	- 7 %	85.500	Stück



Market development France 2022



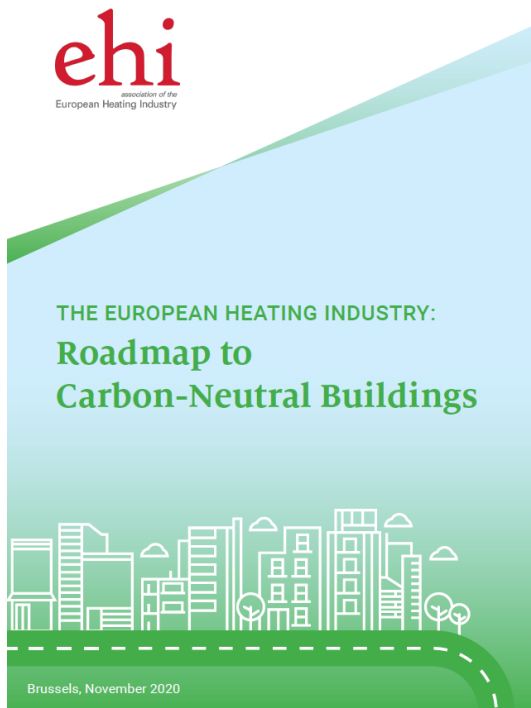
• Total Market:	- 12,0 %	899.000 Pieces
➤ Gas condensing:	- 30,3 %	435.600 Pieces
➤ Oil condensing:	- 31,7 %	6.900 Pieces
➤ Gas non condensing:	- 15,6 %	55.000 Pieces
➤ Oil non condensing:	- 33,5 %	10.300 Pieces
➤ Biomass:	+ 20,3 %	42.000 Pieces
➤ Heat pumps:	+ 29,3 %	349.200 Pieces
• Solar thermal systems:	+ 29,5 %	69.400 m²

Market development Italy 2022

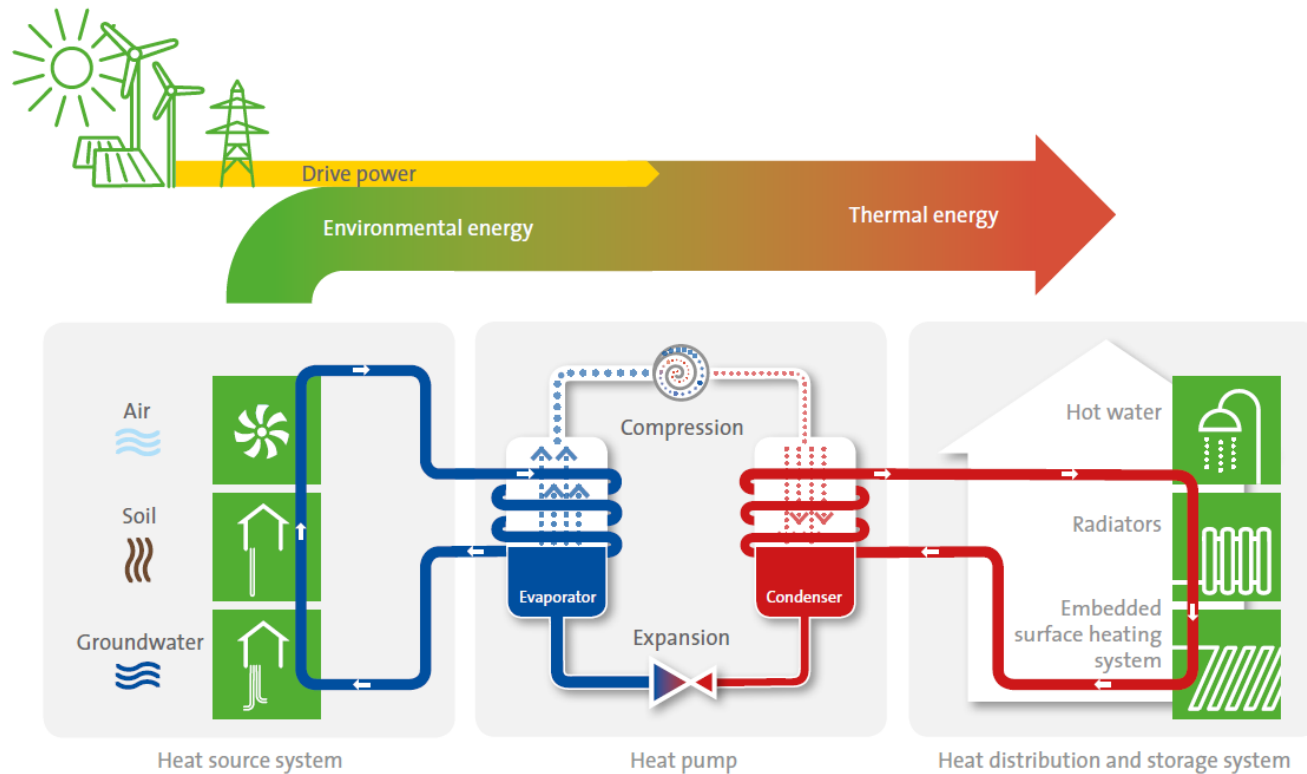


• Total Market:	+ 13,9 %	1.450.100 Pieces
➤ Gas condensing:	+ 6,8 %	1.132.500 Pieces
➤ Oil condensing:	+ 7,7 %	2.800 Pieces
➤ Gas non condensing:	- 19,7 %	40.000 Pieces
➤ Oil non condensing:	- 11,1 %	4.800 Pieces
➤ Biomass:	NA	NA Pieces
➤ Heat pumps:	+ 73,6 %	270.000 Pieces
• Solar thermal systems:	+ 42,9 %	265.000 m²

EHI Vision 2030- 2050: Roadmap to Carbon-Neutral Buildings



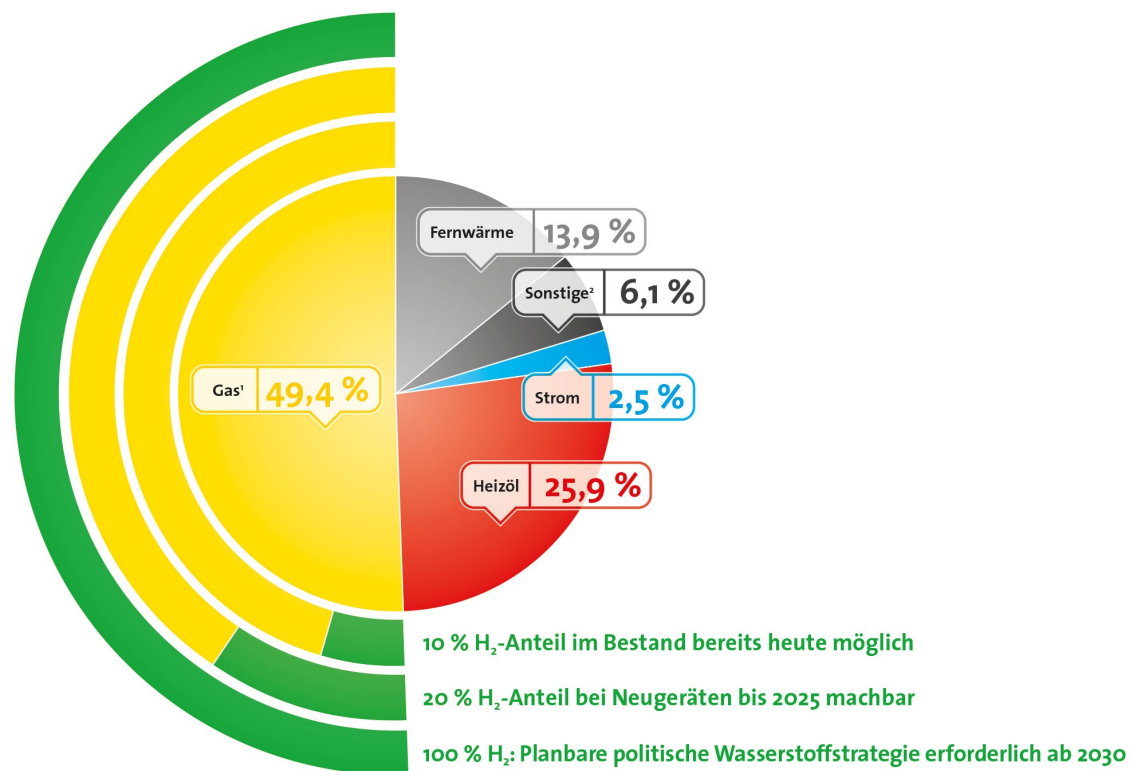
Heating Technologie: Electric Heat Pumps



Benefits:

- ▶ Ready for green electricity.
- ▶ They are highly efficient. A heat pump with a coefficient of performance of 4.0 can transfer 4 units of heat to a building, using 1 kWh of electricity input.
- ▶ Most of the energy used for heating is renewable.
- ▶ They reduce CO₂ emissions; greatest reductions with the use of renewable electricity.

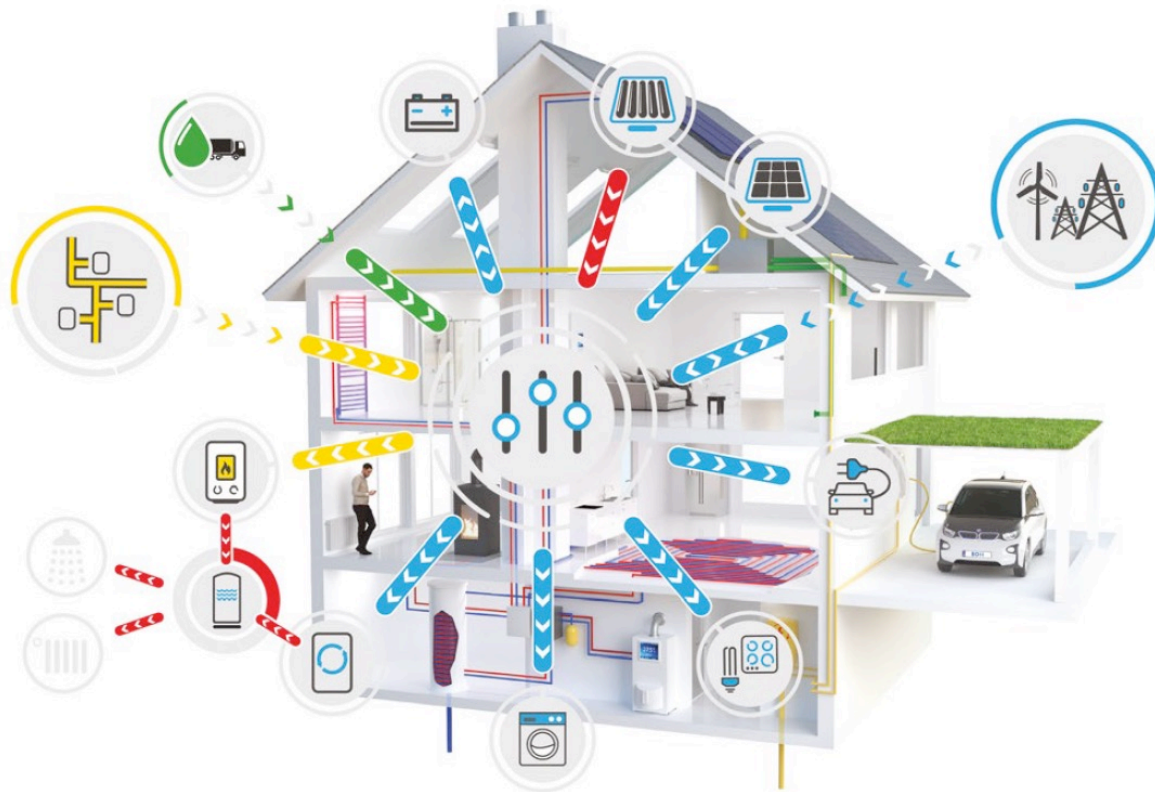
Heating Technologie: Gas condensing boilers (H2-Ready)



Benefits:

- ▶ Ready for green gases.
- ▶ Up to 35% CO₂ emissions reductions when replacing non-condensing technology.
- ▶ Around 20% energy efficiency gains by modernising the heating system.
- ▶ Easy combination with renewable heating and solar thermal.
- ▶ Gas condensing boilers rely on existing gas network.
- ▶ Potential to further reduce greenhouse gas emissions with green gases, like biomethane and hydrogen.

Smart Heating technologie puts consumers in the driver's seat



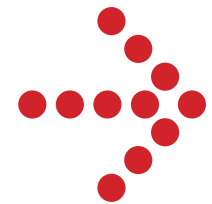
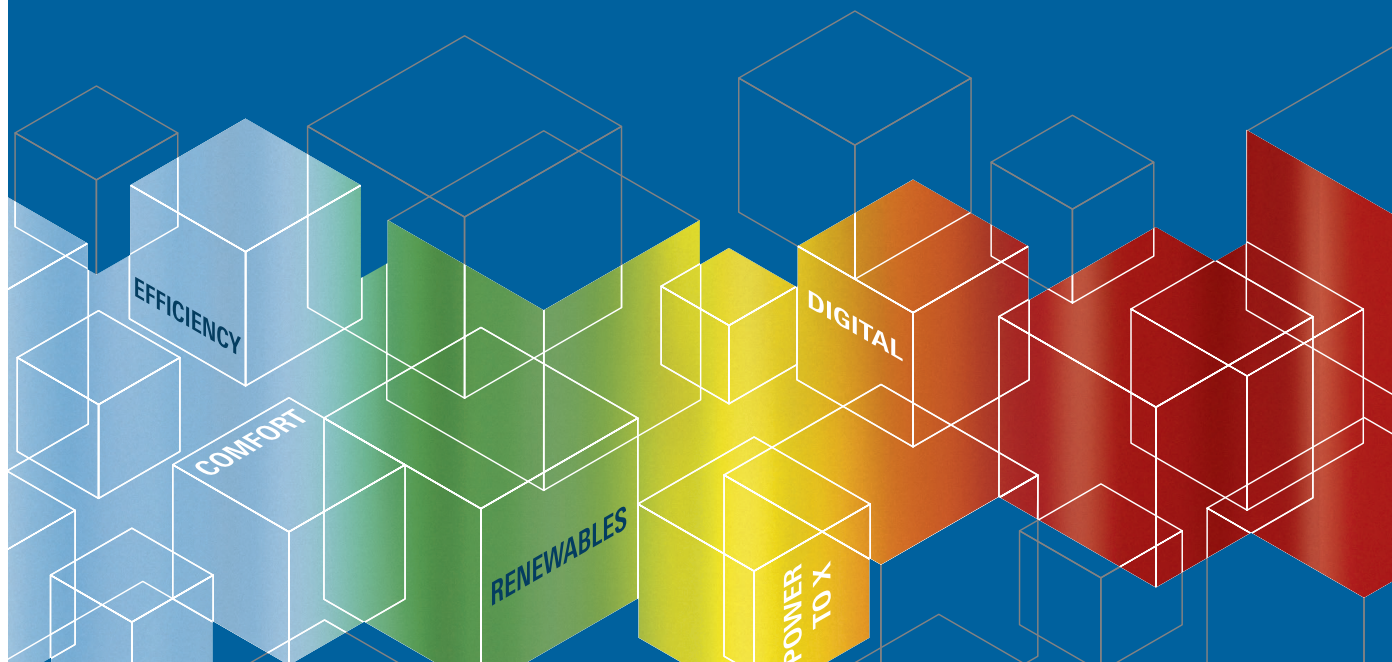
Benefits:

- ▶ Boost efficiency, generating high energy savings.
- ▶ Help to integrate renewable electricity from the grid: for example, setting the smart heater to prioritise electricity consumption when it is more abundant.
- ▶ Can be controlled remotely and easily adapt to consumer's needs.
- ▶ Combinable with all modern heating technologies and renewable energies.

→ Thank you very much

→ www.bdh-koeln.de

→ Twitter: @BDH_Waermewende



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