

## Solar Thermal

### Warming Up for Continuous Growth

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### Industry Overview

As the largest European solar thermal market, Germany is where more than 40 percent of all new systems in Europe are installed. The growth trend of the past five years is expected to continue as Germany's legislative framework and local consumers actively support this sector.

### Our Industry in Numbers

- N° 1 in Europe:  
10.7 GWth  
total

- installed power in 2011.
- 1.66 million of total installed units with 15.3 million m<sup>2</sup> in 2011
- EUR 1 billion of investments in new installations in 2011
- 14,100 employees in 2011 (including CSP)

## **Market Potential**

At the moment, 66 percent of the domestic demand for collectors is being met with local production, leaving an untapped potential of considerable size for foreign companies interested in entering the market.

Solar thermal applications contributed 3.9 percent to the total heating supply from renewable energy resources in 2011. The government aims to increase

the heat contribution from renewable sources from 11 percent in 2011 to 14 percent by 2020, and even 60 percent by 2050.

The strong interest of the end-user for renewable energies, increasing oil and gas prizes and governmental support through the market incentive program (MAP) by the Federal Government are driving factors for the further development of the German market.

### **Market Access**

Throughout Europe, the Solar KEYMARK is the most important quality standard for solar thermal systems. The European Solar KEYMARK is based on the standards EN 12975 (for solar collectors) and EN 12976 (for solar water heating systems), and relevant products must be first be tested and certified by

neutral, independent and competent authorities in order to use it. In Germany, this quality mark is a mandatory requirement to obtain government incentives. The KEYMARK is licensed by DIN CERTCO with the certification mark "DIN-Geprüft" (= Tested).

### **Distribution Channels**

The German solar thermal market is characterized by a three-stage distribution channel. This means that domestic and foreign manufacturers distribute their products to wholesalers/ distributors and these, in turn, sell to the end consumer. In some regions, manufacturers prefer to distribute their products directly through local professional installers and exclusive service providers. Another possibility for companies wanting to enter the German market is to hire

a commercial agent specialized in the solar thermal sector. The **German Association of Sales Agents** (CDH) can be of great help in finding the right sales representative.

### **Supporting Institutions**

There are many institutions in Germany offering support in the field of solar thermal energy. The **Federal Ministry of Economic Affairs and Energy** offers information about the solar thermal industry and useful web links. The **German Solar Industry Association** (BSW) represents the interests of its 800+ members in the sector and acts as a mediator between industry, government and consumers. Visit the BSW portal to find studies, expert opinions and news on the solar industry. Anyone planning to install solar energy systems can use the free

online consulting services to find out more about financial incentives, legal regulations and installation tips.

**The European Solar Thermal Industry Federation**

(ESTIF) is the association that represents over 100 European members consisting of manufacturers, service providers and national associations, which together cover 95% of today's solar thermal market. ESTIF's goal is to promote the further development of solar thermal heating in Europe and represent the interests of both its member and consumers.

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