solarcombi+

Solar Combi+
WP2: Market Analysis

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4th Project Meeting
Bergamo, 3rd – 4th March 2009

Identification of most promising markets and promotion of standardised system configurations for the market entry of small scale combined solar heating & cooling applications
EIE/07/158/SI2.466793 09/2007 – 02/2010

Intelligent Energy Europe

Outline

- WP2: Current status
- WP2: Remaining tasks

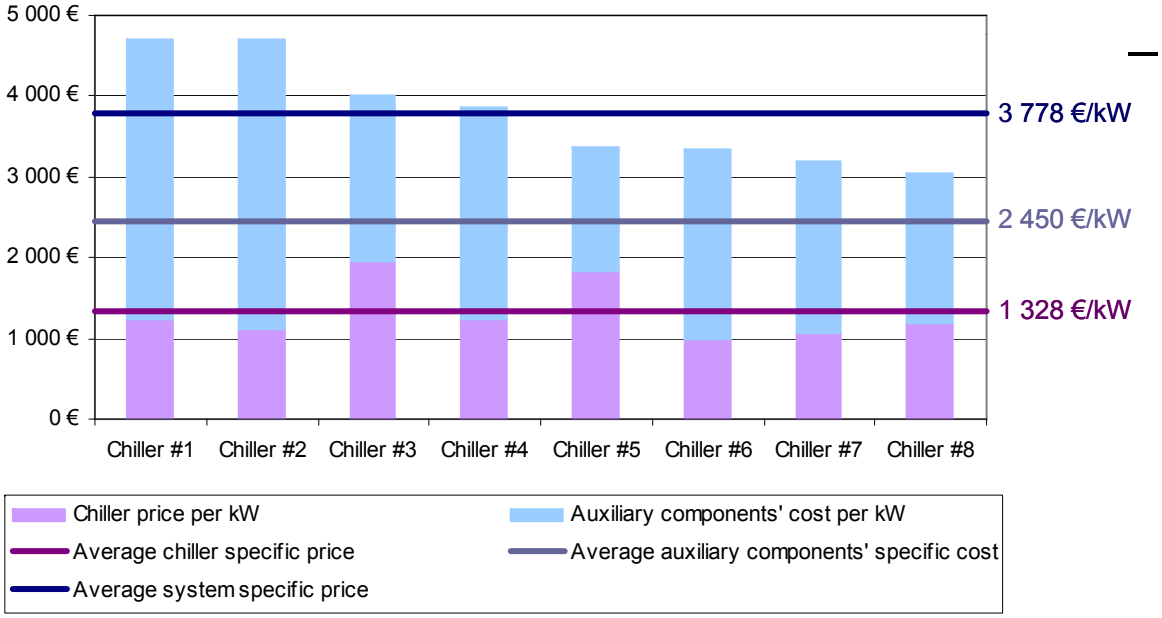
WP2: Current Status

- Update of Deliverables D2.1, D2.2 and D2.3 (Dec. 2008)
  - Actions: Collection – Elaboration of additional data
    Update & Modification of existing graphs, when necessary
    Representation of additional information in new graphs
- Preparation & compilation of Deliverables D2.4 and D2.5 (Feb. 2009)
  - Questionnaires disseminated to industrial partners (feedback received from all, but some confidentiality issues were raised)
  - Bibliographic survey
  - Complete economic analysis: comparison of different case studies (competitive factor with other technologies)
  - Analysis of prospects for future cost reductions: learning curve methodology

WP2: Current Status

D2.4: Specification of component costs - *3-step process*

1. Collection of actual cost data from industrial partners
   - Statistical analysis, short discussion on illustrated results

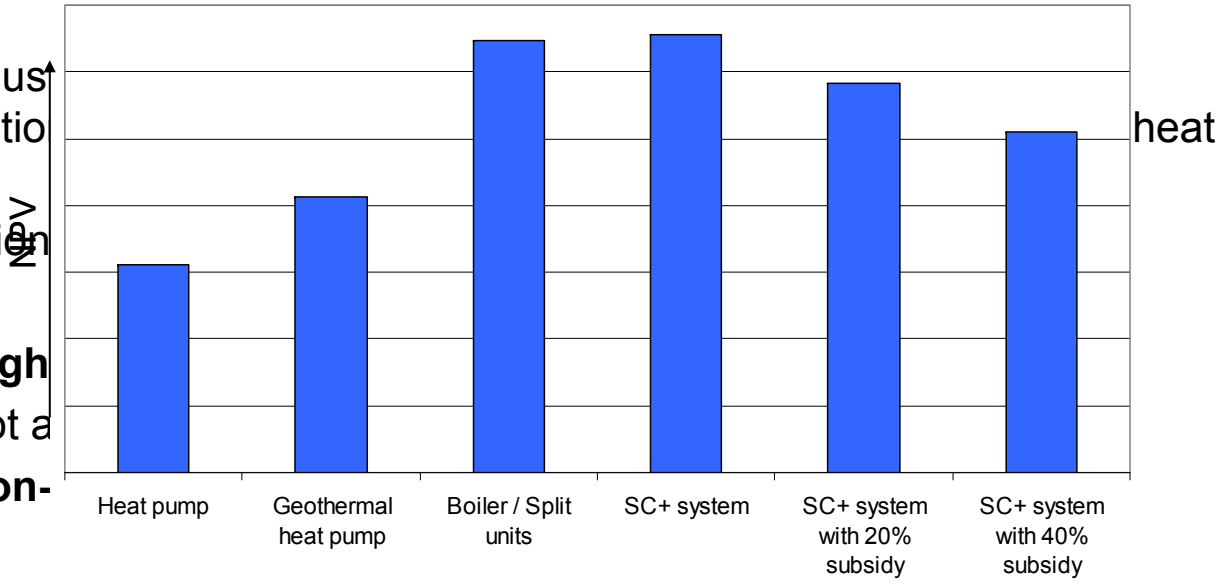


   - Outcome:
     - **Tailored, non-standardized systems**
     - Evidence that the SC+ system has **not** yet overcome the first phase of market penetration!

WP2: Current Status

D2.4: Specification of component costs - *3-step process*

2. Economic Analysis
   - Economic comparison of
     - different case studies (*existing and new buildings*)
     - two scenarios (*single family house* and an *office building*)
   - Outcome:
     - SC+ is us
       conventio
       pump
     - Exceptio
     - Cause:
       - **high**
       - not a
         non-



heat

WP2: Current Status

D2.4: Specification of component costs - *3-step process*

3. Potential of future cost reductions
   - Implementation of the learning curve methodology
     - **Learning by doing**: the manufacturing cost is reduced exponentially as the cumulative production increases
     - Determination of **break-even point**: the necessary increase in cumulative production for the SC+ system's manufacturing cost to reach the one of competing technologies
   - Outcome:

Learning rate	30%	25%	20%	15%	10%
Multiplication of current cumulative installations to reach break-even with heat pump	24	50	156	1 025	44 046

     - **Mass production line** necessary to compete other technologies

WP2: Remaining Tasks

D2.6: SWOT Analysis and D2.7: Potential market and goals

- Delayed due to lack of feedback from WP3
- However important outcomes arose by market analysis conducted so far
- Possible to begin the preparation of SWOT analysis before the end of WP3
- For the finalization of deliverables standard system configuration (D4.1) is required

WP2: Remaining Tasks

D2.6: SWOT Analysis and D2.7: Potential market and goals

- Important issues to be considered:
  1. Technology – related parameters concerning
     - Standard system configurations
     - Operating cost minimization (by restraining the commitment of auxiliary heating systems)
  2. Market – related parameters concerning
     - Establishment of production line
     - Reduction of capital cost
     - Identification of promising market sectors and regions
     - Role of local retailers - installers