WP2 MARKET ANALYSIS - Phase1

common meeting

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Phase 1

Market research on three pillars

- Small scale chillers (D2.1)
- Solar thermal applications (D2.2)
- Consumers (D2.3)
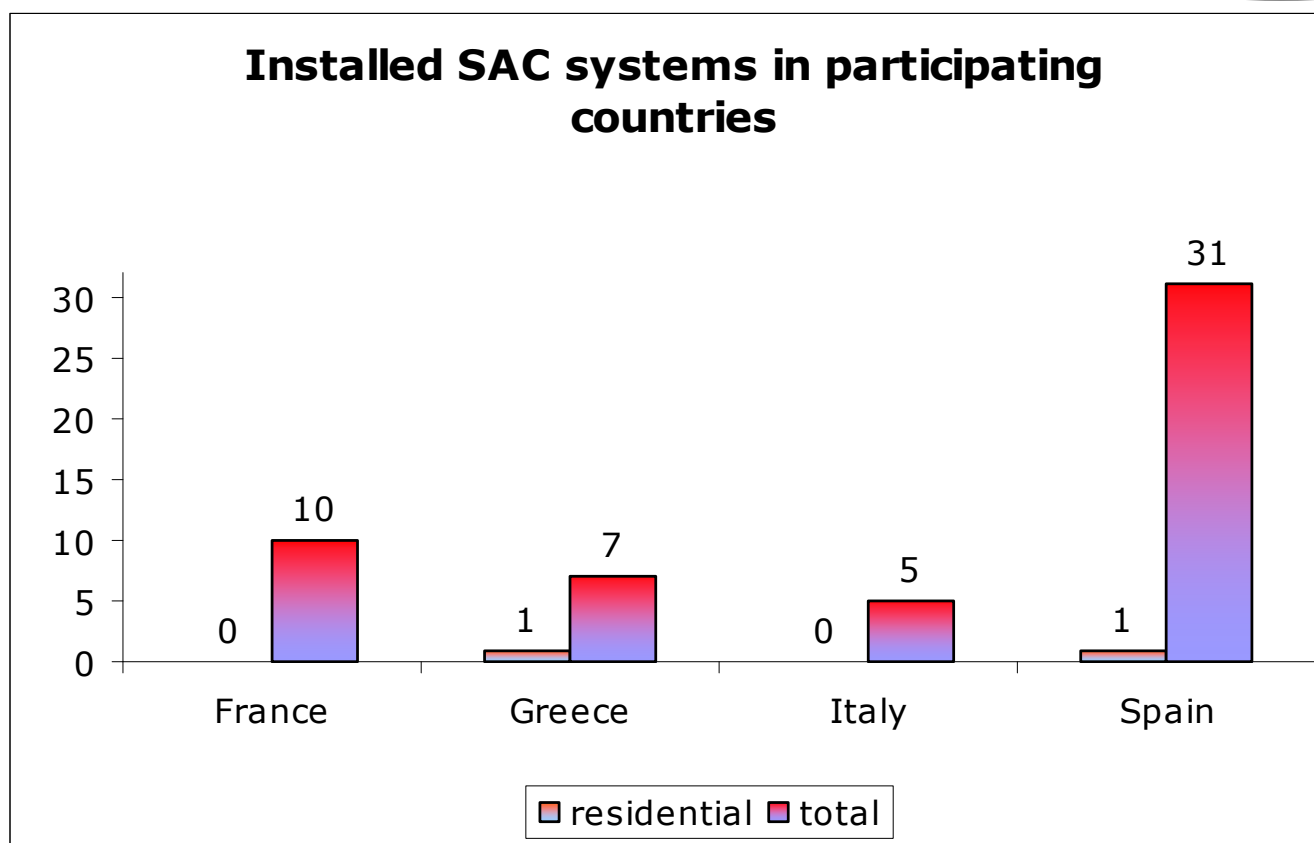
Markets to be analysed

- Italy, Spain, Greece, Germany, Sweden, France & Austria (participating countries)

Methodology adopted

- Synergy among IEE projects SolarCombi+ & SOLAIR

  - Using input from the SOLAIR questionnaire concerning the existing <u>SAC systems</u> (residential & non-residential sector), <u>national AC market</u>

- Questionnaires development (2 different and dedicated)

  - Questionnaire for the "industrial partners" of the project (existing technologies, kind of systems etc.)
  - Questionnaire for the "consumers behavior" based on conventional AC retailers opinion

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Market Analysis Input from SOLAIR project

SOLARCOMBI+ Swedish partner:
15.000 Solar Thermal installations
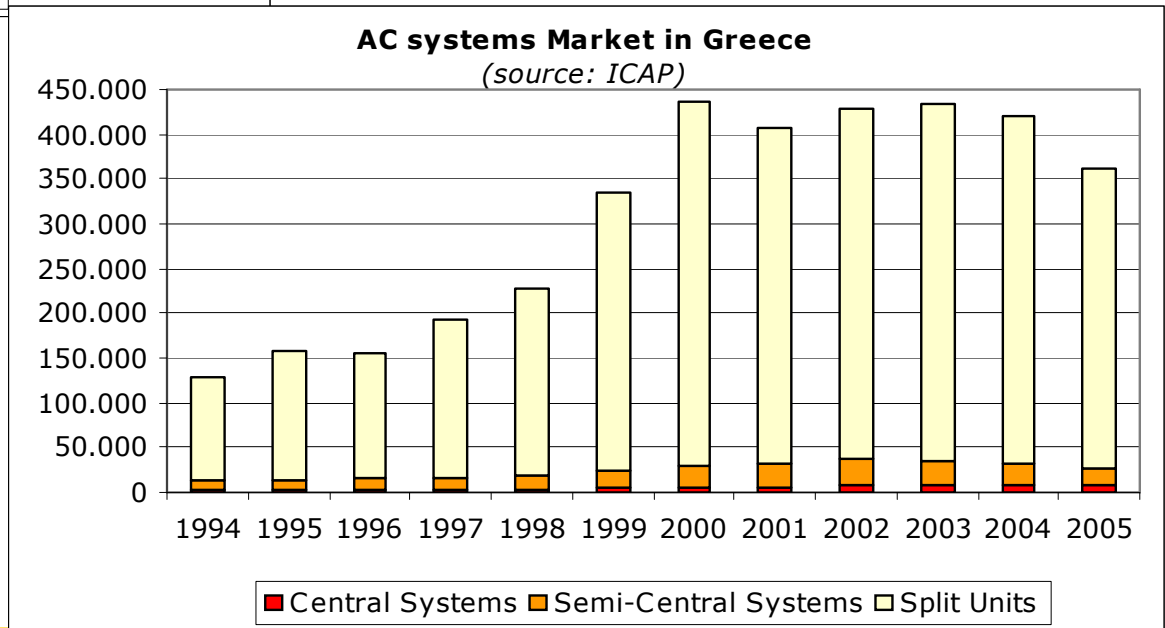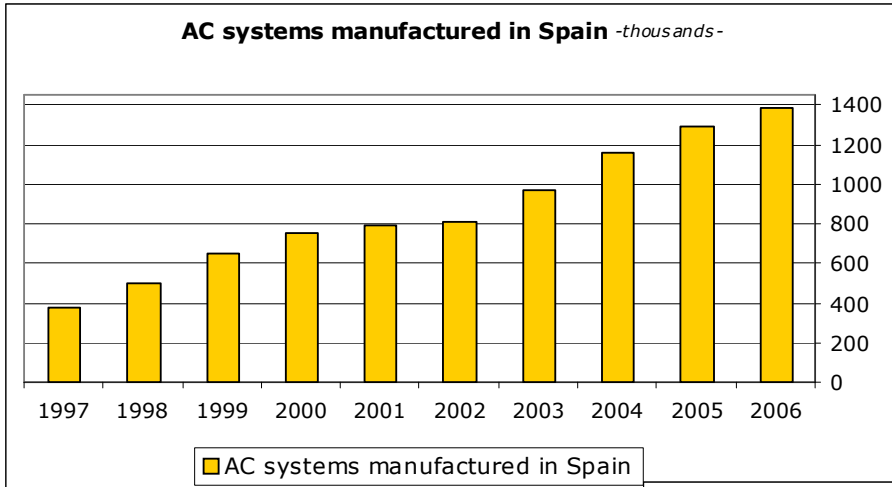**for space heating in Sweden**
(2000 installations/year)

Installed SAC systems in participating countries

Legend: residential, total

X-axis: France, Greece, Italy, Spain

Data labels:
- France: residential 0, total 10
- Greece: residential 1, total 7
- Italy: residential 0, total 5
- Spain: residential 1, total 31

Source: Solair project

Market Analysis Input from SOLAIR project

AC systems manufactured in Spain *-thousands-*

National AC market's trends

AC systems Market in Greece
(source: ICAP)

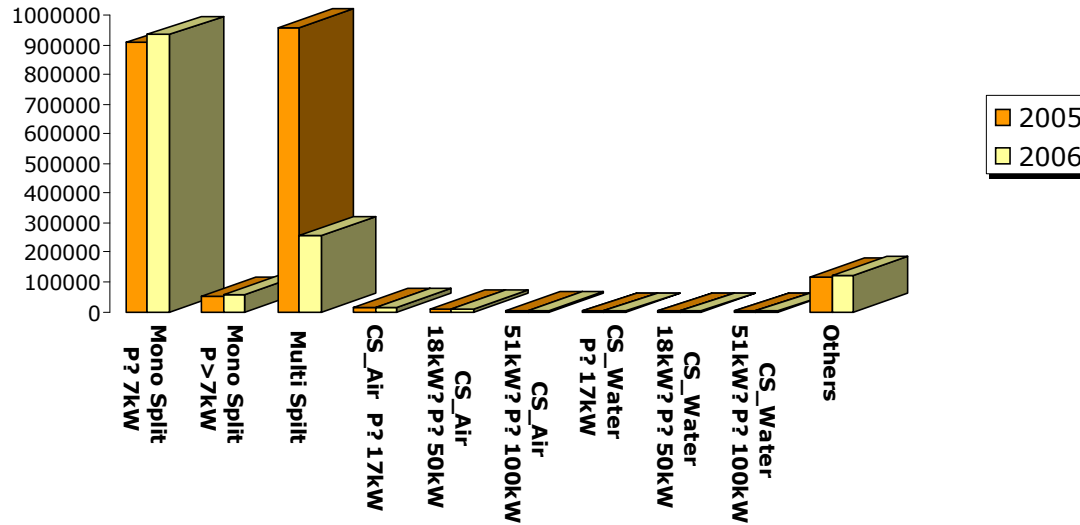■ Central Systems ■ Semi-Central Systems □ Split Units
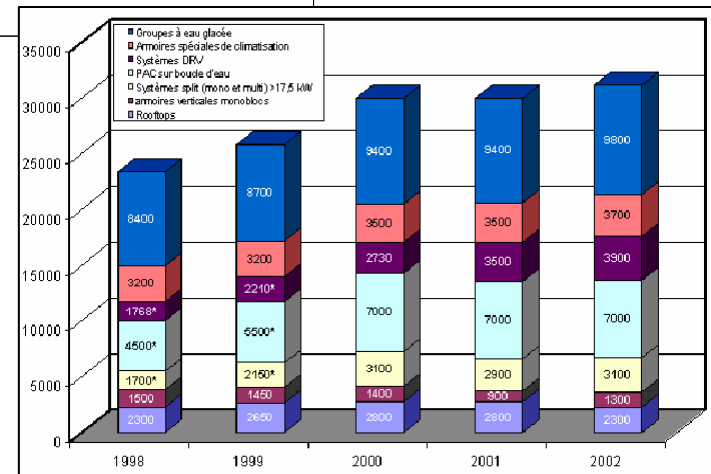
Source: Solair project

Market Analysis Input from SOLAIR project

Italian AC Market Analysis 2005/2006
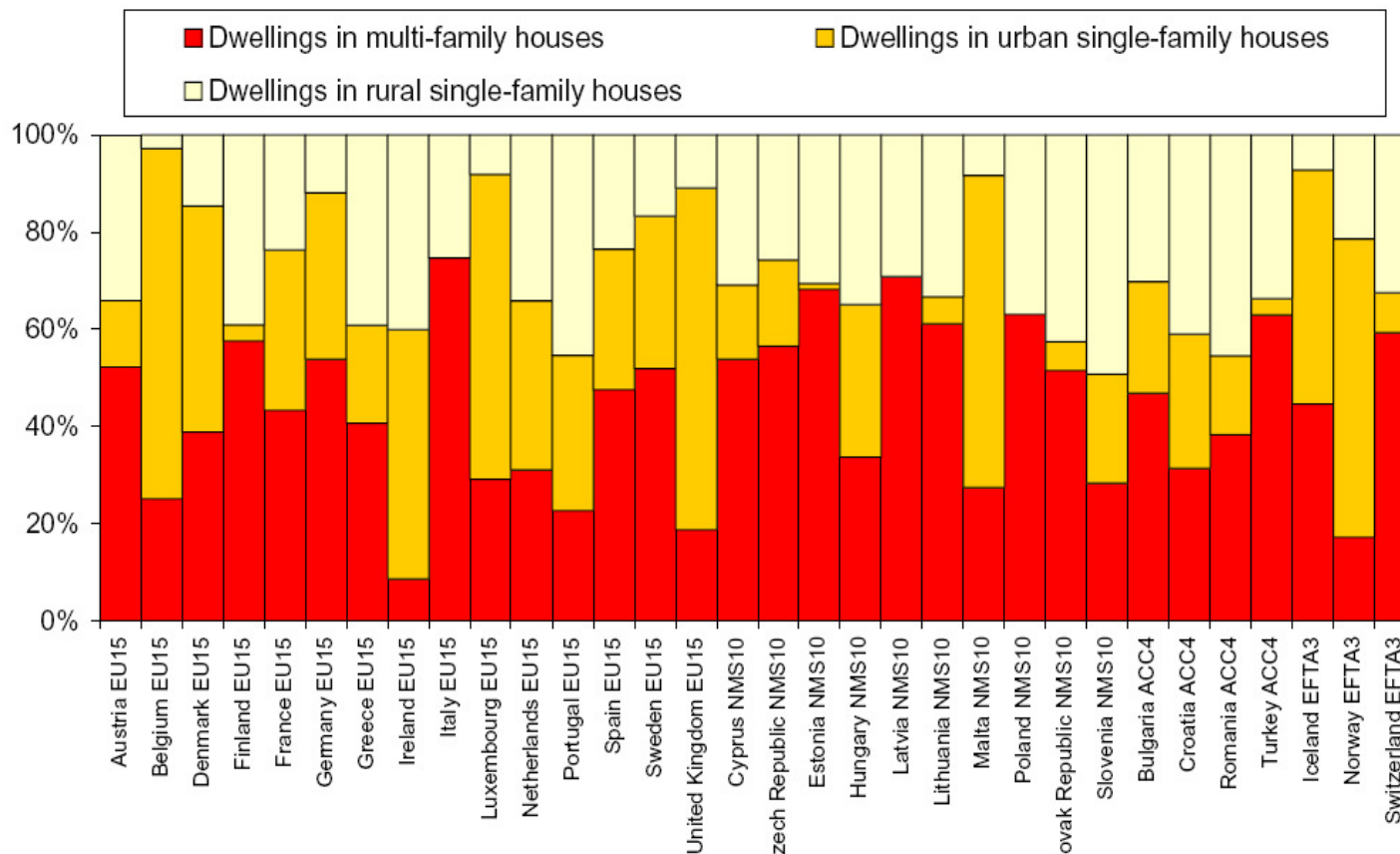

National AC market's trends

French AC Market Analysis
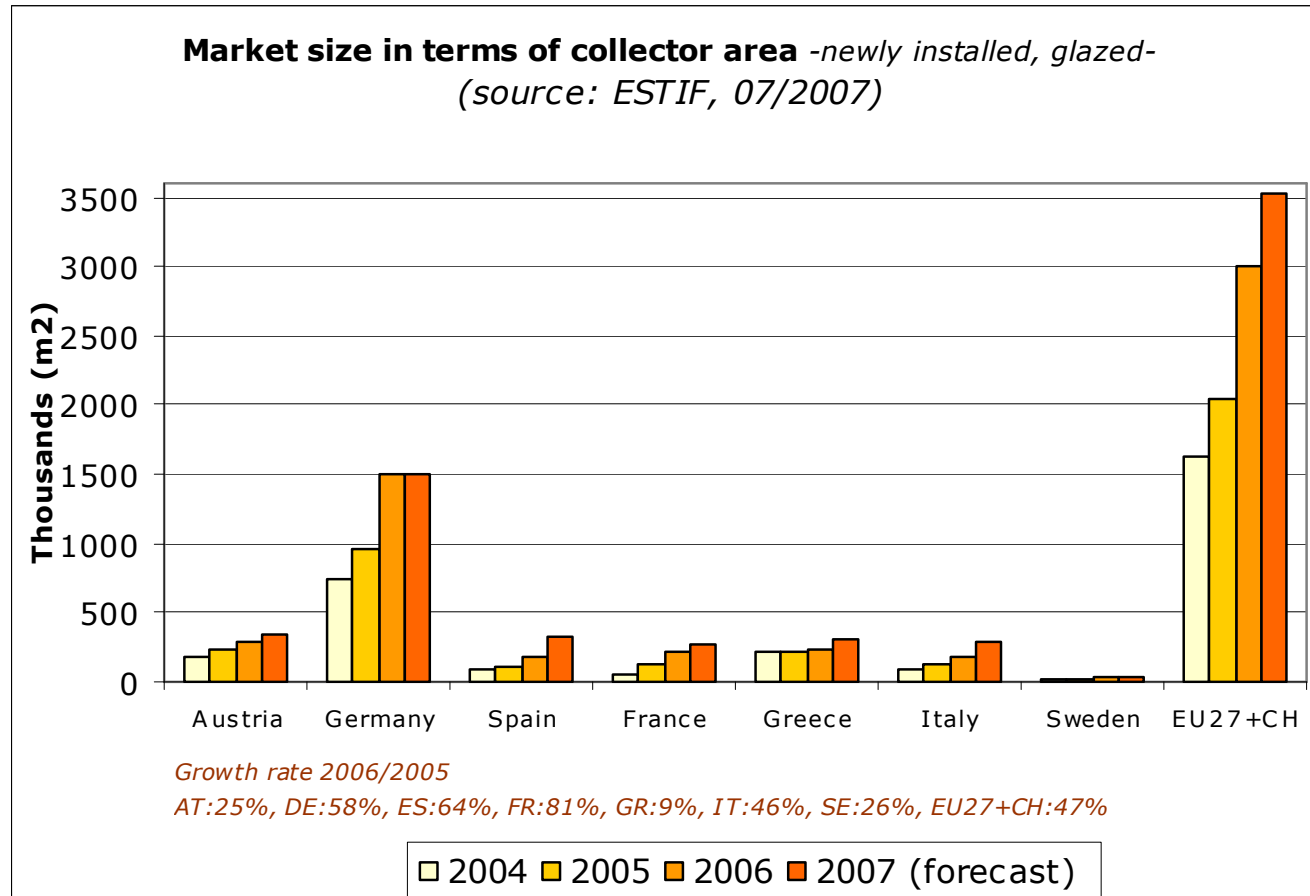

Source: Solair project

Market Analysis Input from SOLAIR project
Buildings stock info

Residential living situation with respect to fraction of dwellings in multi- and single-family houses, based on the latest year (2006)

Market Analysis Input from other sources

Market size in terms of collector area *-newly installed, glazed-*
(source: ESTIF, 07/2007)

Growth rate 2006/2005
AT:25%, DE:58%, ES:64%, FR:81%, GR:9%, IT:46%, SE:26%, EU27+CH:47%

□ 2004 □ 2005 ■ 2006 ■ 2007 (forecast)

Questionnaire SOLAR COMBI+ for industrial partners

Germany: SorTech & SonnenKlima, Austria: Solution , Spain: IKERLAN & ROTARTICA, Sweden: ClimateWell

Structure

- **Section A: Technology-Characteristics**

  Technical info about the system and/or products (chiller technology, refrigerant, cooling capacity, cop, dimensions)

  Operational Parameters (Temperature & flow rate)

  Solar System

  Compatibility with other energy sources & external systems

  Other technical parameters

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Questionnaire for industrial partners

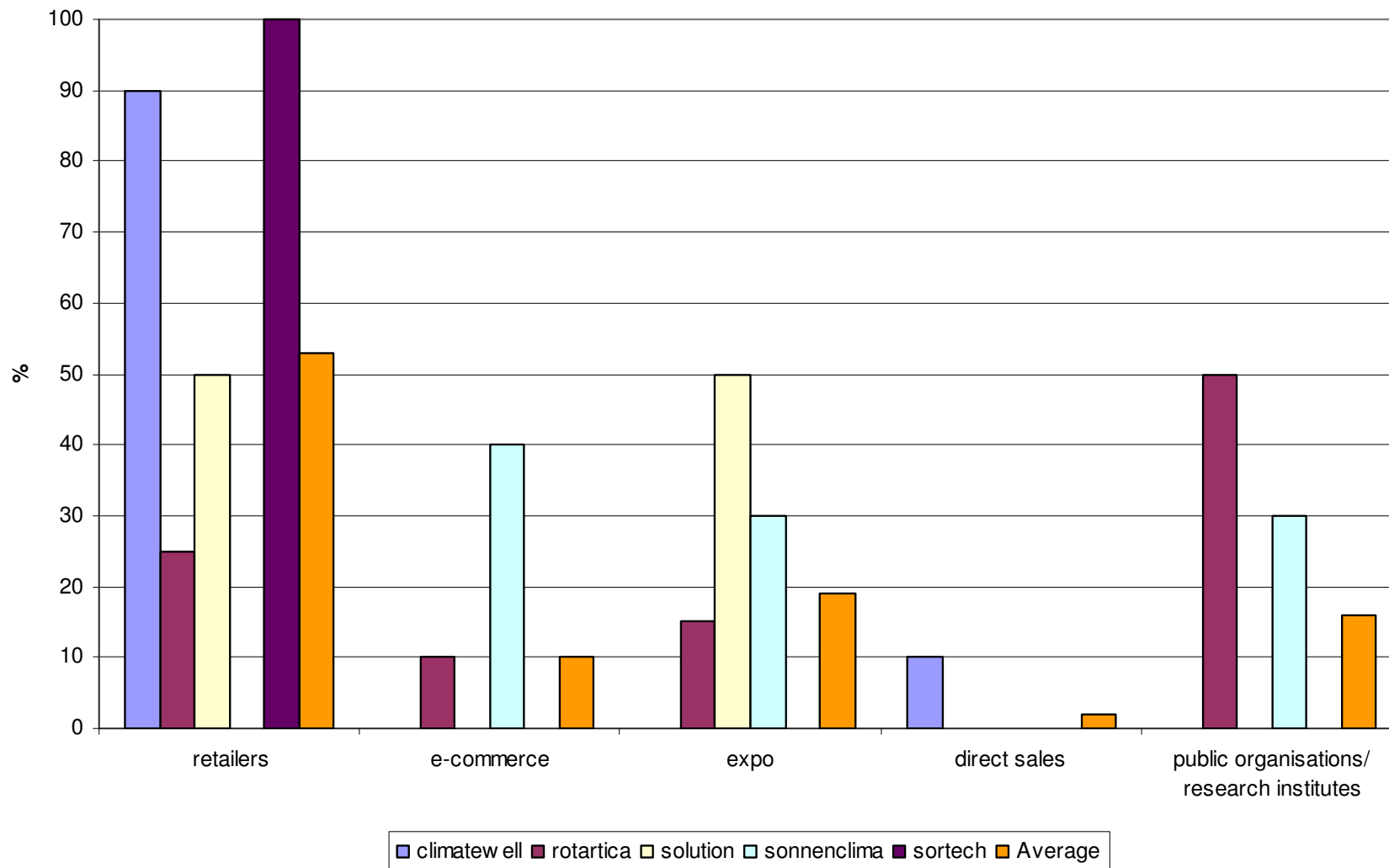- **Section B: Costs /Market Description**
  - System's cost breakdown (Components or products cost)
  - Selling method
  - Volume of sales
  - Recommended use of the given system regarding the dwelling type (single family house, multi flat apartments etc)
  - Markets of interest
  - Projections (of sales, costs and turn-key price)
- **Sections C: Other**
  - Customers opinions about the overall system operation, the provided services and costs
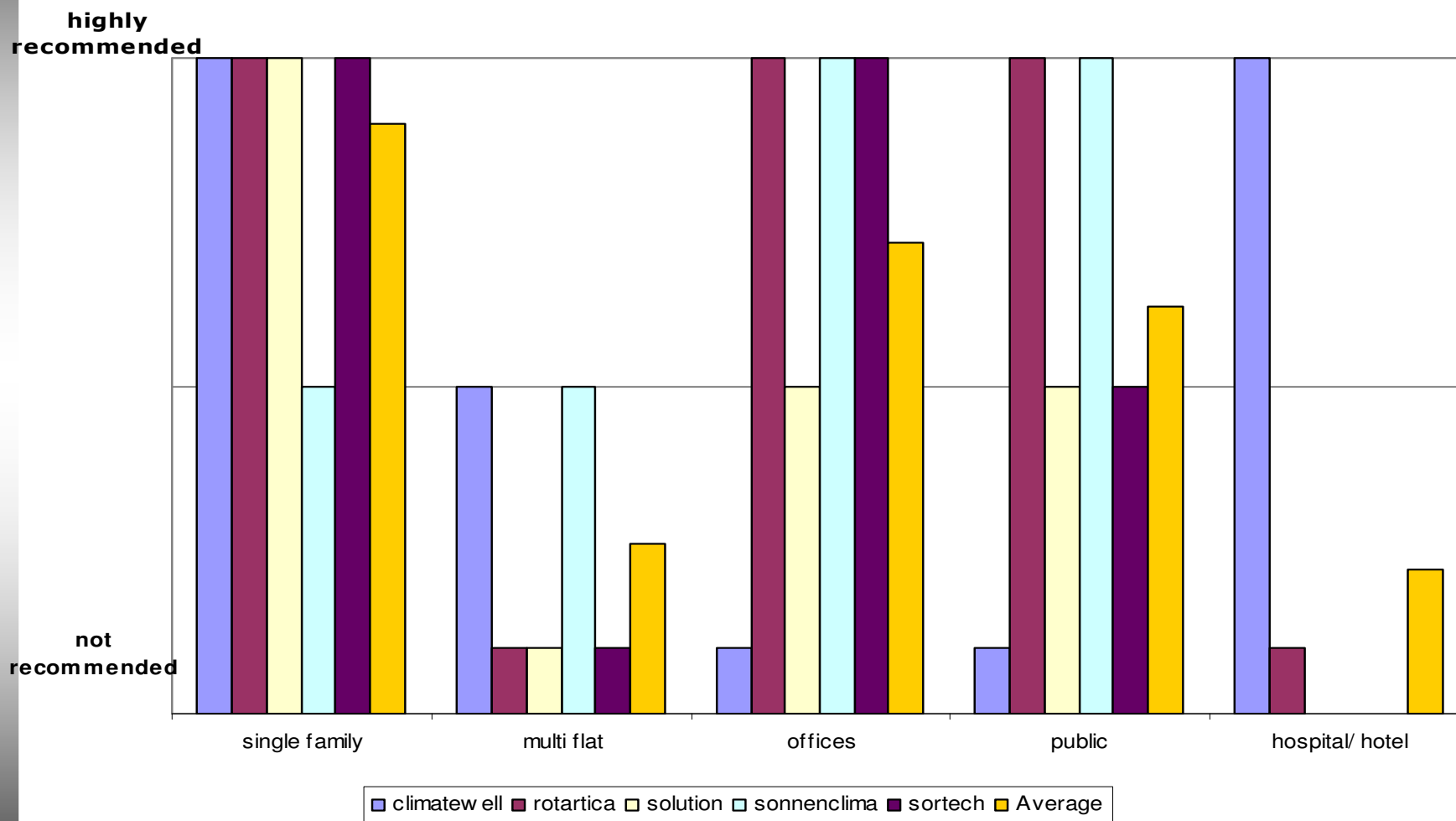 - New products foreseen

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Selling Method

Legend: climatewell, rotartica, solution, sonnenclima, sortech, Average

Recommended use of the given system regarding the dwelling type

highly recommended

not recommended

single family   multi flat   offices   public   hospital/ hotel

☐ climatewell ☐ rotartica ☐ solution ☐ sonnenclima ☐ sortech ☐ Average

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Markets of interest
(input from SOLARCOMBI+ industrial partners)

higher priority

Spain   France   Italy   Usa   Greece   Germany   Austria
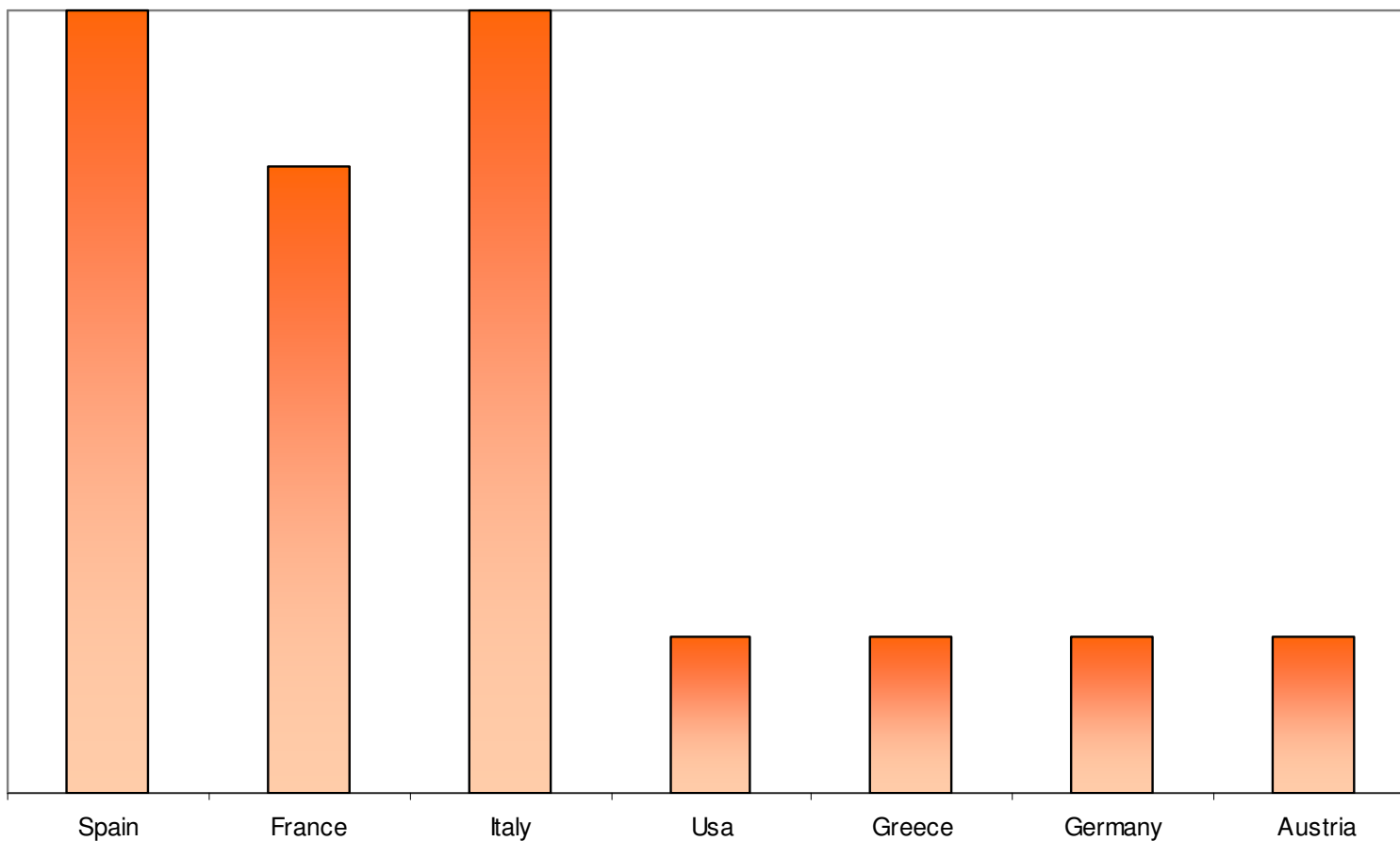
Questionnaire for "consumers behavior"

- Questionnaire built up to record consumers attitude based on the AC systems retailers opinion
- Quantitative & qualitative approach of the AC systems market

Structure

- **Section A: General Info of retailer**
  - firms represented by the retailer,
  - sales allocation (region, sector)
  - type of system (central, semi-central, split units)
 - volume of sales

Questionnaire for "consumers behavior"

- **Section B: Consumers Attitude**
  - Market share of: energy efficient products, nominal power & operation mode *(quantitative parameters)*
  - Product selection based on qualitative parameters such as trademark & energy label
  - Awareness on environmental protection, rational use of energy & energy efficiency
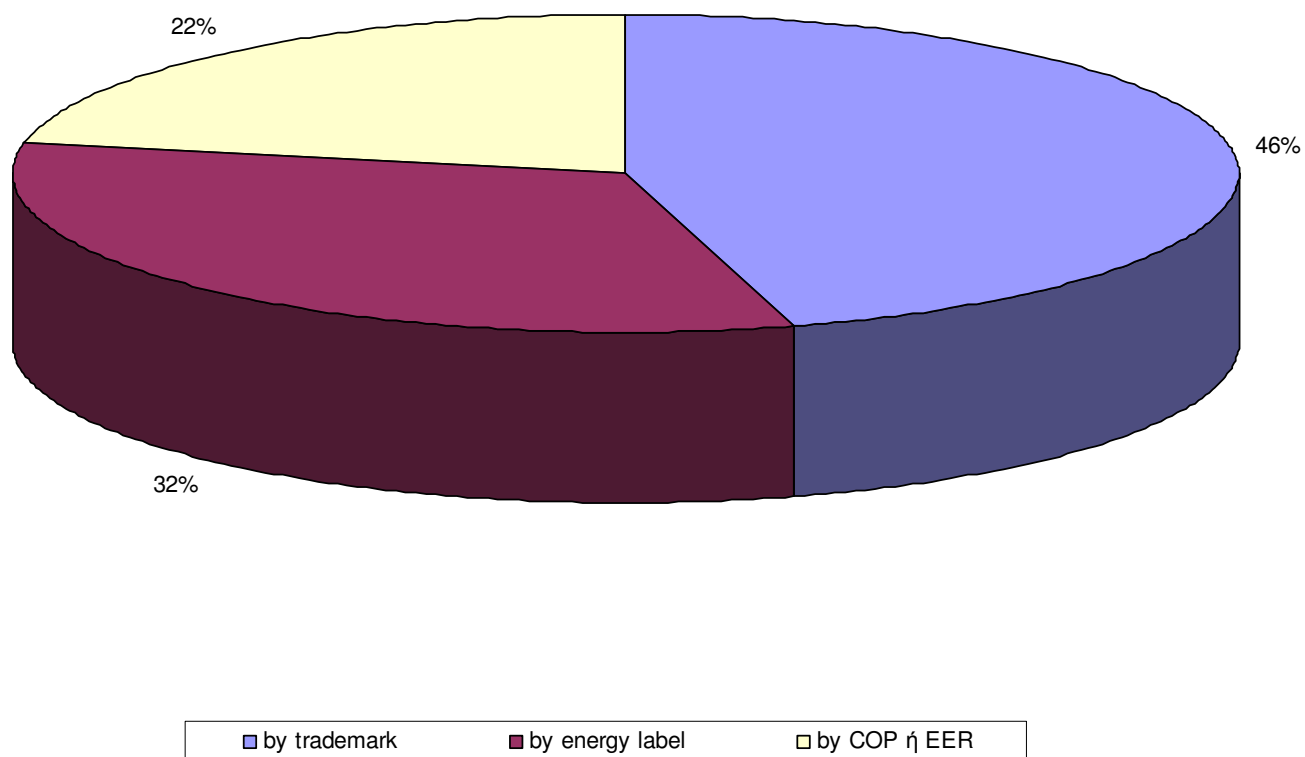 - Wiliness to pay for more efficient, reliable or elegant products
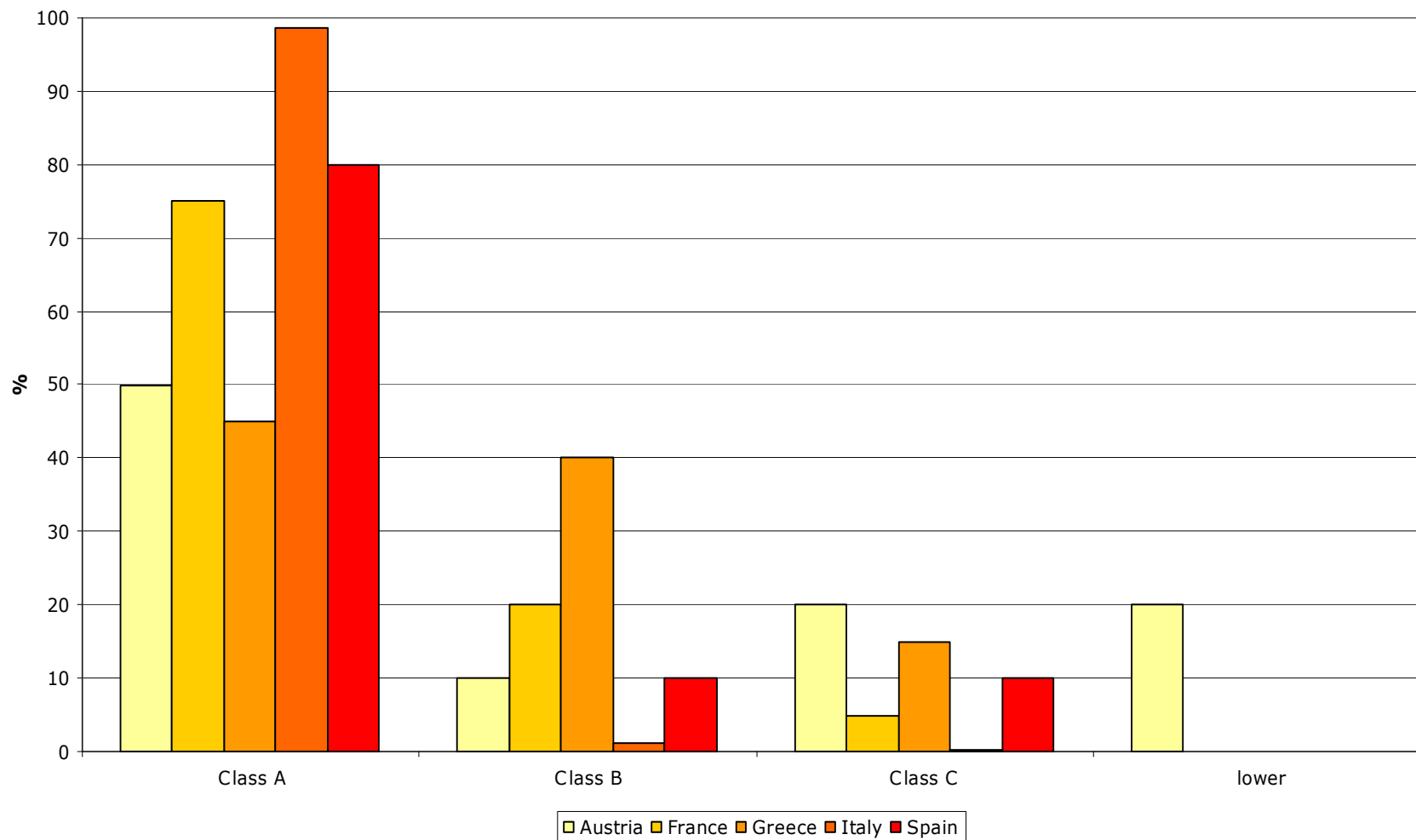- **Section C: General info**
  - Classification of products selection

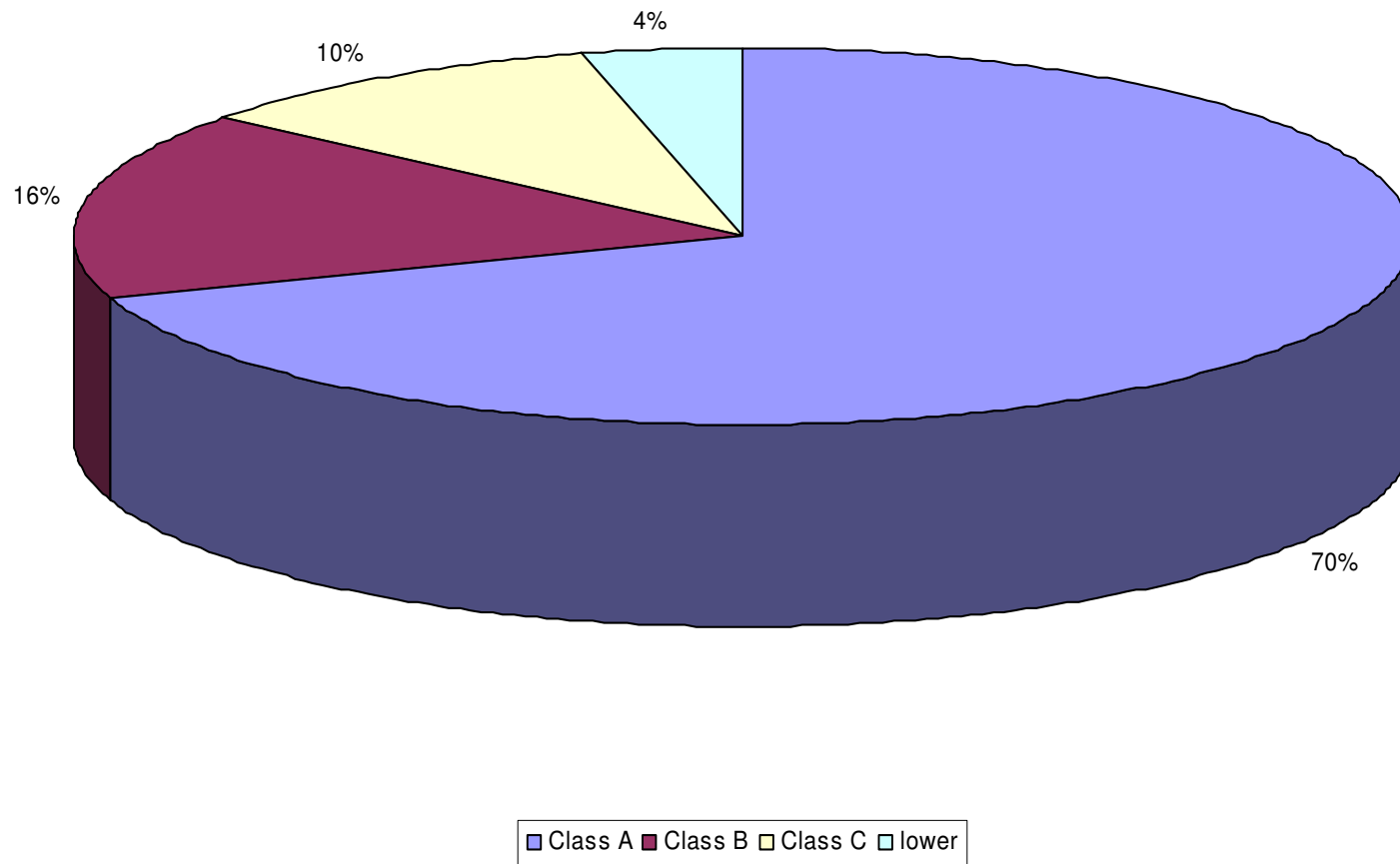**Product selection (non economic criteria)**
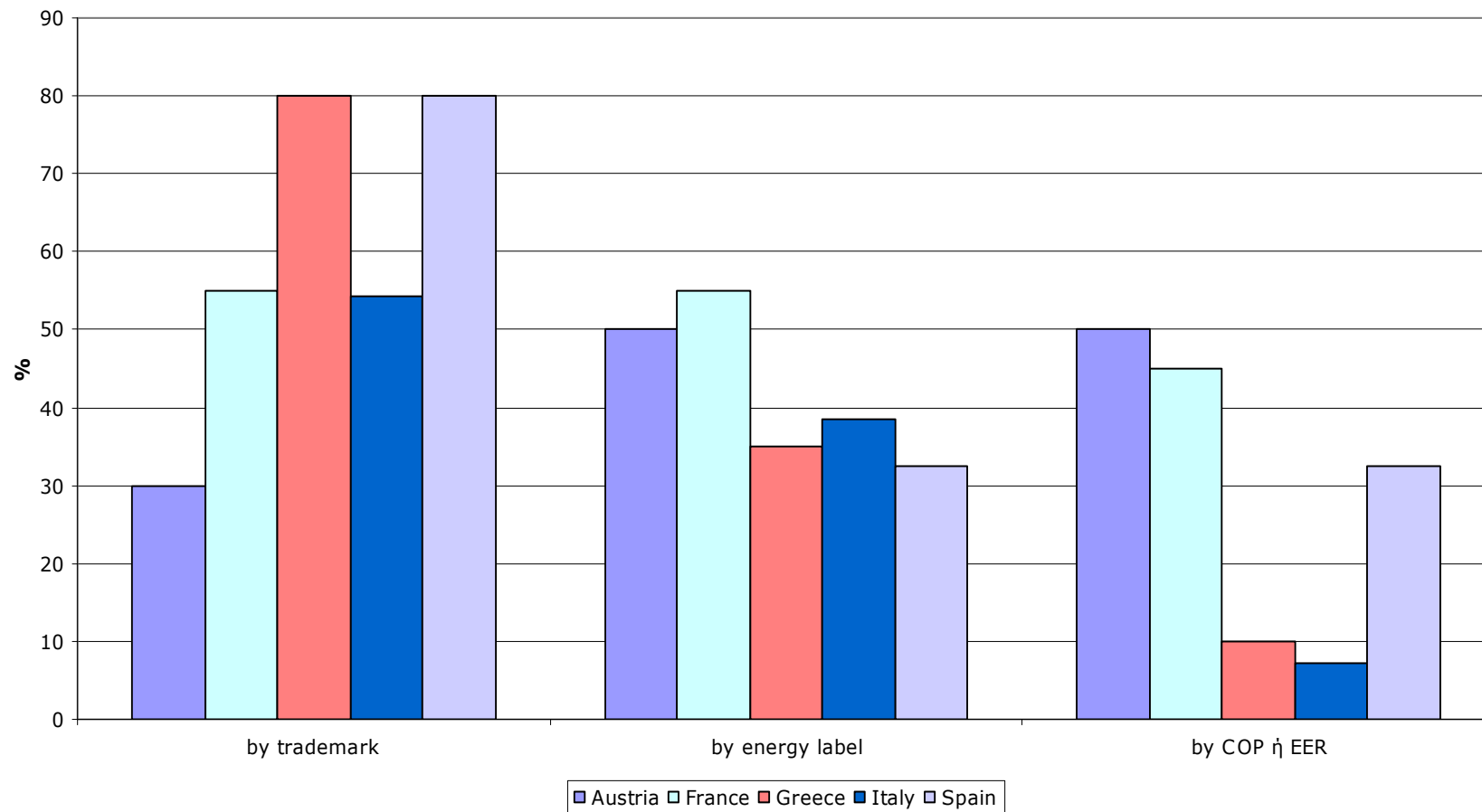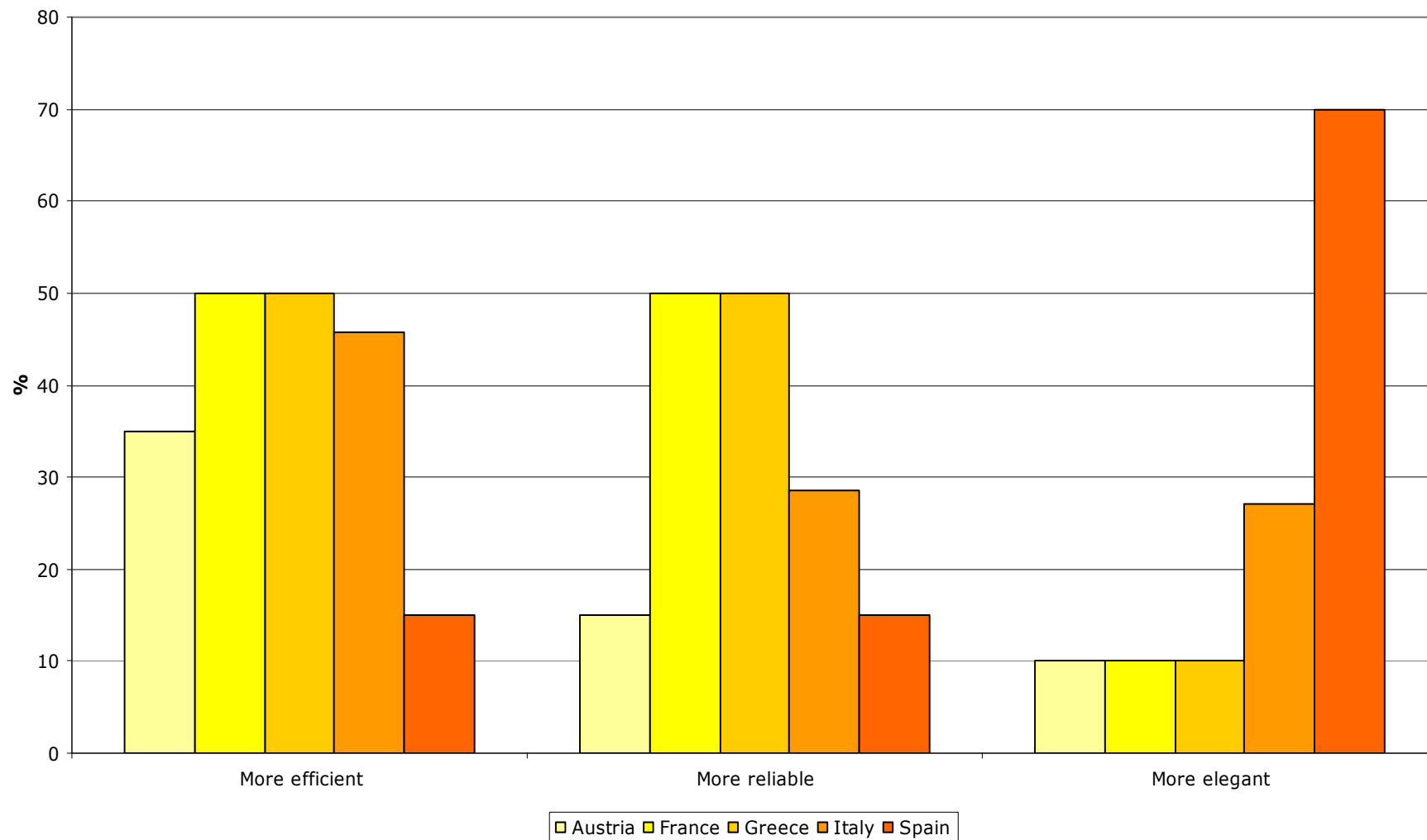
Product's selection based on non economic criteria

22%

46%

32%

☐ by trademark   ☐ by energy label   ☐ by COP ή EER

Energy Efficient products sold (split units)

Interesting results !

solarcombi+

**Products sold (split units) in participating countries
Energy Efficiency Classification**

10%

4%

16%

70%

Class A Class B Class C lower

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solar**combi+**

Consumers wiliness to pay for a system....

Austria ☐ France ☐ Greece ☐ Italy ☐ Spain

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Interesting results !

Classification of product's selection (average)
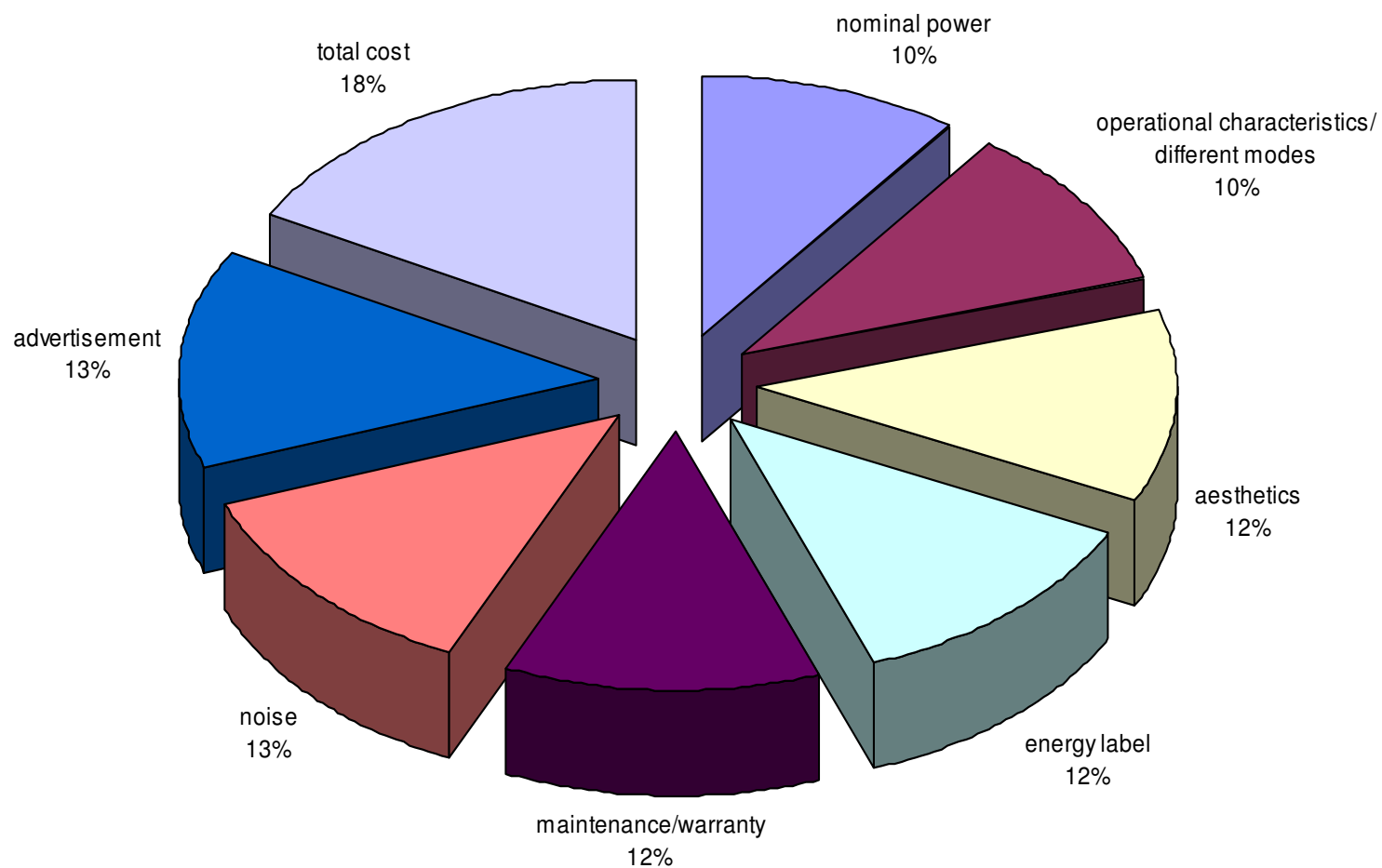
Remarks

- The Solar Combi+ Market Analysis is almost completed but pending data might have remarkable influence on the conclusion (especially on the consumers behavior evaluation)

- The message is positive for SAC but:
  the consumers want to buy <u>efficient products</u> in a <u>competitive price</u> especially when these products are <u>supported by famous trade mark</u>.

Thank you for your attention