



The European domestic boiler market volume (%) by product, 2008

This report will help you to:

- Identify market opportunities
- Understand market trends
- Keep up to date with market developments, the players and routes to market
- Develop sales, marketing and distribution strategies

Introduction

This study is part of a series of multi-client reports on the world's market for heating. These newly updated reports are available on a country by country basis and in-depth format. This new suite of the Heating reports, published in March 2009, provides you with independent analysis of significant markets for these increasingly popular products.

The report covers **28 countries** in total, in key markets in **Europe, Middle East, Americas** and **Asia**. Countries analysed in the study include **Algeria, Argentina, Austria, Belgium, Chile, China, Czech Republic, France, Germany, Greece, Iran, Italy, Japan, Morocco, Netherlands, Poland, Romania, Russia, Saudia Arabia, Slovakia, Spain, Switzerland, Tunisia, Turkey, UAE, UK, Ukraine** and **USA**.

Study Overview

In recent years many of the European heating markets have been in decline. In Germany and Italy, the boiler market shrunk dramatically. Germany suffered a large in the domestic boiler market, particularly floor standing type, which experienced the largest decrease. Reasons for this were mainly because consumers were uncertain about which technologies to choose and were holding back expenditure on heating products.

Conventional heating markets experienced increased competition from renewable technologies, especially heat pumps.

Germany is the leader in the European commercial boiler market, closely followed by the UK. The preferred boiler output in the Americas region is of the 100-300kW, whilst on a global scale the 50-100kW range is the favoured option.

China dominates the global radiator market with over 23.6million sales in 2008. Tunisia is one of the smaller markets in the global radiator market; nevertheless it recorded an average growth of twelve per cent bringing the overall market close to 98,000 units. Cast iron radiators and towel warmers are the products that have increased the most quickly in volume.

In 2008, the Chinese underfloor heating market more than double in volume from 2007, making it the market leader. The rapid growth of the underfloor heating market was spurred by the booming building construction in China and the increase of people's awareness of floor heating.

The global water heating market experienced a small growth in 2008. Electric storage water heaters accounted

for 38% of the market, with glass lined steel being the most popular option. The Americas region dominate the electric instantaneous water heater market with 81.4% of the total market share by volume.

Wall hung domestic boilers accounted for 72% of the European market in 2008. The Italian market recorded sales of 715,200 units for that particular year. On the whole the total market experienced a small drop of 0.6% from 2007.

BSRIA Worldwide Market Intelligence

BSRIA's Worldwide Market Intelligence division (WMI) has been providing specialist market intelligence to the building services for over 25 years. Its multinational staff works with a wide network of industry contacts to source detailed, reliable data across a number of product areas.

BSRIA's global heating study has been produced using a variety of research techniques including; desk research, face-to-face and telephone interviews with manufacturers, suppliers and distributors WMI's unrivalled mix of technical and market knowledge equates to confidence in decision-making and dependable results.

Excel Overview is available for the study.

For further details of this or any other WMI study please contact Tim Page at BSRIA:

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- The housing park by type of heating product, 2008
- Volume and value of the *domestic boiler/commercial boiler/radiators and underfloor heating/water heating market*, 2008

For commercial boilers:

- Commercial boiler market by output and type, >50kW ('000 units), 2007-2008
- Commercial boiler market by heat exchanger material and type, >50kW, volume ('000 units), 2007-2008
- Market shares of *wall hung cascade boilers, atmospheric and premis gas boilers, pressure jet gas boilers, oil boilers*, >50kW, volume 2007-2008

For domestic boilers:

- Domestic boiler sales by output, <50kW, volume ('000 units), 2007-2008
- Market shares of *wall hung (condensing) gas boilers, wall hung (non-condensing) gas boilers, floor standing condensing atmospheric gas boilers, floor standing non-condensing atmospheric gas boilers, pressure jet fired and gas boilers, solid fuel boilers*, 2007-2008
- Domestic boiler sales by heat exchanger material, 2007-2008
- Domestic boiler sales by fuel eventually used, 2007-2008

For water heating:

- Electric storage heaters by product type, material type and capacity, volume, 2007-2008
- Electric instantaneous by power rating and by type, volume, 2007-2008
- Gas instantaneous heaters by flow rate, volume, 2007-2008
- Gas storage by capacity, volume, 2007-2008
- Indirect cylinders by capacity and by heating element, volume, 2007-2008

For radiators and underfloor heating:

- Steel radiator market by panel type, volume 2007-2008
- Towel warmer radiator market, volume, 2007-2008
- Underfloor heating market by type of pipe material, by pipe diameter, by radiator equivalent, volume, 2007-2008
- Market shares for *steel panel radiators, towel warmer radiators, tubular (round or flat) steel radiators, aluminium radiators, cast iron radiators, underfloor heating*

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