

# Report

[www.bsria.co.uk](http://www.bsria.co.uk)

## World Renewables 2008

### Germany - Micro CHP

Report 51871/1  
January 2009

#### A multi client study

**Compiled by:** Daniel Zimmermann

**No. of pages:** 15 of text

**Quality Approved:** *Abdel Eljidi*

This report must not be reproduced except in full without the written approval of an executive director of BSRIA. It is only intended to be used within the context described in the text.

**BSRIA Limited**

Old Bracknell Lane West, Bracknell, Berkshire RG12 7AH UK

**T:** +44 (0)1344 465600 **F:** +44 (0)1344 465626

**E:** [bsria@bsria.co.uk](mailto:bsria@bsria.co.uk) **W:** [www.bsria.co.uk](http://www.bsria.co.uk)

## CONTENTS

1	MARKET BACKGROUND OVERVIEW .....	1
1.1	Economy and construction .....	1
1.1.1	Population and climate .....	1
1.1.2	Economy .....	2
1.1.3	Construction .....	2
1.1.4	New house building .....	3
1.2	Energy supply .....	3
1.2.1	Overview .....	3
1.2.2	Residential gas supply .....	4
1.2.3	Residential electricity supply .....	4
1.3	Heating stock .....	5
1.4	Local heating practices .....	5
2	FORECAST ASSUMPTIONS: MARKET DRIVERS AND CONSTRAINTS .....	6
2.1	Energy policy and regulations .....	6
2.2	Subsidies and incentives .....	7
2.3	Manufacturers, research & development .....	9
2.4	Utilities .....	10
2.5	Installers and consumers .....	11
3	MARKET FOR CONVENTIONAL HEATING PRODUCTS .....	12
3.1	Market size and product segmentation .....	12
3.2	Condensing boilers .....	13
4	ROUTES TO MARKET .....	14
5	TRENDS AND FORECASTS .....	15

## TABLES

Table 1.1	Background data economy and construction, 2005-2009 .....	1
Table 1.2	Housing completions, thousand dwellings .....	3
Table 1.3	The housing park by type of heating product, 2007 .....	5
Table 2.1	The BAFA approved list of products eligible for grant support <10kW electrical .....	9
Table 2.2	Development of the B.KWK (the Federal association of CHP) listed Micro-CHP manufacturers and product developers located in Germany 2005-2008 .....	9
Table 2.3	Curent B.KWK (the Federal association of CHP) listed Micro-CHP manufacturers and product developers located in Germany .....	10
Table 3.1	Volume and value of the domestic boiler market, <50kW, 2006 and 2007 .....	13
Table 5.1	Forecast of the German Micro CHP and stationary fuel cell, 2006-2013 .....	15

## FIGURES

Figure 1.1	Map of Germany .....	1
Figure 1.2	Worlds top natural gas consuming countries, 2004 .....	4
Figure 3.1	Domestic boiler sales by type, volume ('000 units), 2007 .....	13
Figure 5.1	Forecast of the German Micro CHP market, volume (units), 2006-2013 .....	15