



The world solar water heating market, volume (m2), 2003-2006

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
- Stay ahead of the competition

Introduction

This study is part of a series of multi-client reports on the world's market for renewables. These newly updated reports are available on a country by country basis and **in-depth format**. This new suite of the Solar Thermal reports, to be published in October 2008, provides you with independent analysis of significant markets for these increasingly popular products.

The report covers key markets in **Europe, Asia** and the **Americas**. The study comprises of the following countries, **Germany, Austria, Switzerland, France, Italy, Spain, UK, Belgium, Portugal, Poland, Brazil, Hungary, Greece, Turkey, Croatia, USA, China** and **Korea**.

Study Overview

The growth of the French solar thermal market slowed down in 2007; rapid growth is not expected in 2008. Flat plate collectors dominate the market accounting for over 90% of the solar thermal market. Prices for solar thermal collectors saw an increase of 8-10% because of a rise in raw material costs, especially copper. However strong competition in the market has forced manufacturers to keep their prices as low as possible.

Spain is one of the largest solar markets in Europe, currently third behind Germany

and Austria. The market experienced a buoyant growth of around 50% compared to 2006. However the market is expected to experience a slowdown due to a difficult economic situation that the country is suffering.

Increased attention from the Chinese government on renewable energy has contributed to the fast double-digit growth rate for the past decade. The market is dominated by vacuum tube systems, which grew by 22% by volume in 2007 whilst the flat plate collector market grew by 17%. 'U shape' glass vacuum tubes dominate the Chinese solar thermal market, which is largely because consumers are unaware of the different types of vacuum tubes used in their solar water heaters.

Amongst other factors, an increase in VAT and a mild winter in 2006/2007, reduced sales in the German solar thermal industry, decreasing by nearly one third. Despite the slowdown the total surface area of solar collectors was 952,000 million square metres in 2007, and the market is set to grow again in the future.

The boom Austria has experienced in the solar thermal market since 2000, continued through to 2007. By the end of the year, a total surface of 3.6 million

square metres of solar collectors was in operation in Austria.

Despite the economic downturn in the US, the market will enjoy a healthy growth of 20% this year. The market represents a very small share of the world market for glazed and vacuum tube solar collectors, with only one per cent of total installations occurring in the country.

Incentives are an important driver in the growth of the Italian market. The government offer a 55% tax reduction on domestic and industrial water installations.

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 Solar Thermal 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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