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Press release

NEW: the EurObserv'ER thematic barometers will now be published in unilingual versions: French and English Barometers will be separate documents. All versions are freely downloadable at: www.eurobserv-er.org/downloads.asp

From: EurObserv'ER

Subject: **Released:** Solar Thermal Barometer
http://www.eurobserv-er.org/pdf/baro221_en.asp
(PDF, English language, 18 pages, 3.6 MB)

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Date: June 2014

Pages: 5

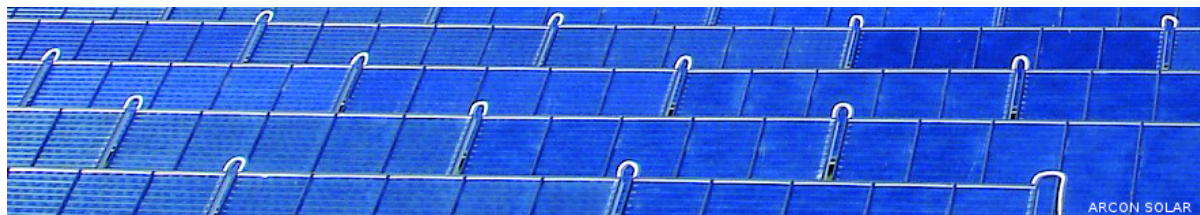


For Concentrating Solar Power (CSP) plants

- Commercial Concentrating Solar Power (CSP) plants, end of 2013: 2311.5 MW_e (1961.2 MW_e end of 2012)
- CSP projects under development at the beginning of 2014: 638.8 MW_e

For solar thermal water heaters

- Additionally installed EU-28 solar thermal surfaces (hot water) in 2013: 2119.3 MW_{th} (2440.3 MW_{th} in 2012)
- Cumulative EU-28 solar thermal surfaces (hot water) end of 2013: 31391.5 MW_{th} (29657 MW_{th} in 2012)



New EurObserv'ER Solar Thermal Barometer

CSP: Italy concentrates European hopes

SHW: 2013, an abysmal year

The European concentrated solar plant market is set to mark time for a year following efforts to complete construction on 350 MW of CSP capacity in Spain in 2013. The spotlight has switched to Italy which could re-launch the European market within a couple of years. The European solar thermal market for heat and hot water production and space heating, is shrinking all the time. EurObserv'ER reports that the market is in its fifth successive year of contraction in the European Union. It now posts a 10.5% decline on its 2012 performance having struggled to install just over 3 million m² of collectors in 2013.

EurObserv'ER estimates that in the European Union installed capacity of commercial **Concentrating Solar Power** (CSP) plants at the end of 2013 amount to 2311.5 MW_e, with a number of CSP projects under development (status at the beginning of 2014: 638.8 MW_e). CSP News from the main countries in the Solar Thermal Barometer:

- Spain loses its lead;
- The spotlight has switched to Italy;
- The French sector on hold pending the next tender;

The European Union **Solar Thermal Sector** for hot water and heat production has been suffering from development problems for several years. In 2013, the market slipped for the fifth time in a row, with installed collector surface down to just 3027532 m² (equating to 2119.3 MW_{th} of capacity), i.e. 13.2% less than in 2012. The EurObserv'ER survey finds that in 2013 flat-plate collectors accounted for almost 90% of the glazed collectors, completely outstripping vacuum tube collectors. The flexible collector (unglazed) market is basically geared to heating local authority and private swimming pools, but is under-represented because the market is not so closely monitored. Solar Water Heater News from the main countries in the Solar Thermal Barometer:

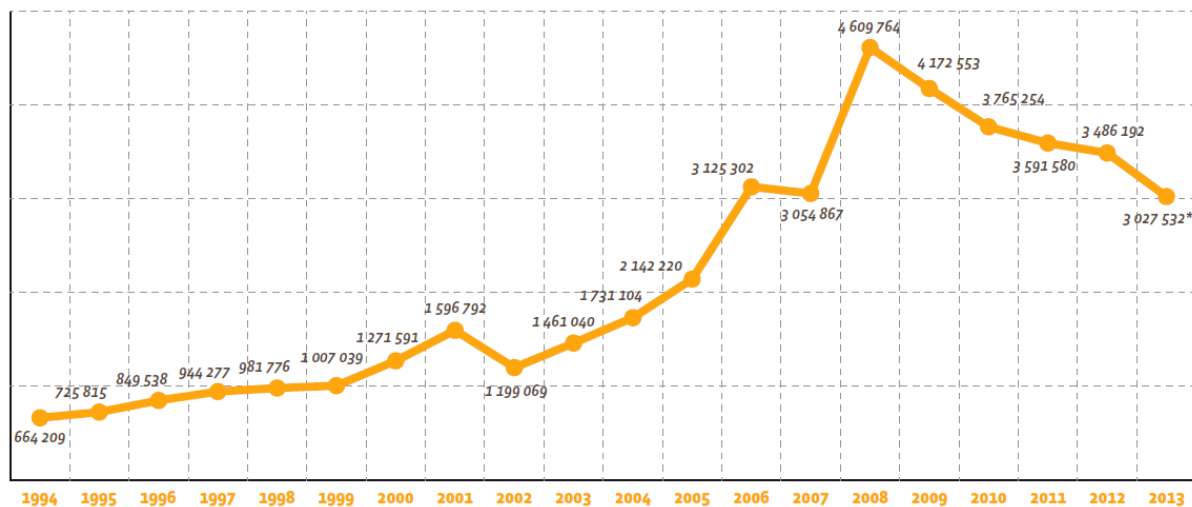
- The German market sliding except in new build;
- United Kingdom: the domestic RHI is now in place;
- The Italian Feed-in Tariff is a smokescreen;
- The Polish market's coffers run dry;
- The French market in a very bad way;
- Delays getting solar district heating networks up and running in Denmark.

Besides the 2013 realisations per EU Member State and the abovementioned renewable energy policy developments in selected Member States other subjects that are discussed in the new barometer are:

- Industry overview
- Comparison with National Renewable Energy Action Plans

Graph n° 3

Evolution of annually installed surfaces of solar thermal collectors in the European Union since 1994 (in m²)



Member states included at the date of their accession. * Estimate Source: EurObserv'ER 2014

Check out the Press Corner http://www.eurobserv-er.org/press_corner.asp

For additional information on renewable energy issues (data referring to 2012, among others EU Member State renewable energy employment, turnover and investments) see also the annual EurObserv'ER publication *The State of Renewable Energies in Europe*, 2013 edition: <http://www.eurobserv-er.org/pdf/bilan13-gb.asp> (PDF, English, 200 pages, 12 MB).

Note: the interactive database on the website (click on 'Interactive EurObserv'ER Database' on the www.eurobserv-er.org homepage) allows you to download the Barometer data separately. This will allow you to create your own graphs to be used in your publication.

About the EurObserv'ER Barometer

The EurObserv'ER Barometer regularly publishes indicators reflecting the current dynamics in renewable energies (solar, wind, hydropower, geothermal and biomass, biogas, biofuels) worldwide and within the European Union.

Barometers published are all available for download. Direct links to all 2014/2013/2012 EurObserv'ER publications:

Solar Thermal Barometer (CSP and solar water heaters)
(May 2014, PDF, 18 pages, English language, 3.6 MB)
http://www.eurobserv-er.org/pdf/baro221_en.asp

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Solar Photovoltaic Barometer
(April 2014, PDF, 16 pages, English language, 2.9 MB)
http://www.eurobserv-er.org/pdf/baro-jdp11_en.asp

Wind Power Barometer
(February 2014, PDF, English, 14 pages, 2.8 MB)
http://www.eurobserv-er.org/pdf/baro-jde14_en.asp

'The State of Renewable Energies in Europe', 2013 edition
(January 2014, PDF, English language, 200 pages, 12 MB)
<http://www.eurobserv-er.org/pdf/bilan13-gb.asp>

Solid Biomass Barometer
(December 2013, PDF, English language, 14 pages, 2.9 MB)
http://www.eurobserv-er.org/pdf/baro219_en.asp

Heat Pump Barometer
(October 2013, PDF, English language, 18 pages, 2.5 MB)
<http://www.eurobserv-er.org/pdf/baro218.asp>

Biofuels Barometer
(July 2013, PDF, English language, 16 pages, 3.1 MB)
http://www.eurobserv-er.org/pdf/baro216_en.asp

Biogas Barometer
(December 2012, PDF, English/French language, 14 pages, 2.0 MB)
<http://www.eurobserv-er.org/pdf/baro212biogasEu.asp>

Renewable Municipal Waste Barometer
(December 2012, PDF, English/French language, 12 pages, 1.9 MB)
<http://www.eurobserv-er.org/pdf/baro212mswEu.asp>

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