

SOLAR THERMAL AND CONCENTRATED SOLAR POWER BAROMETER

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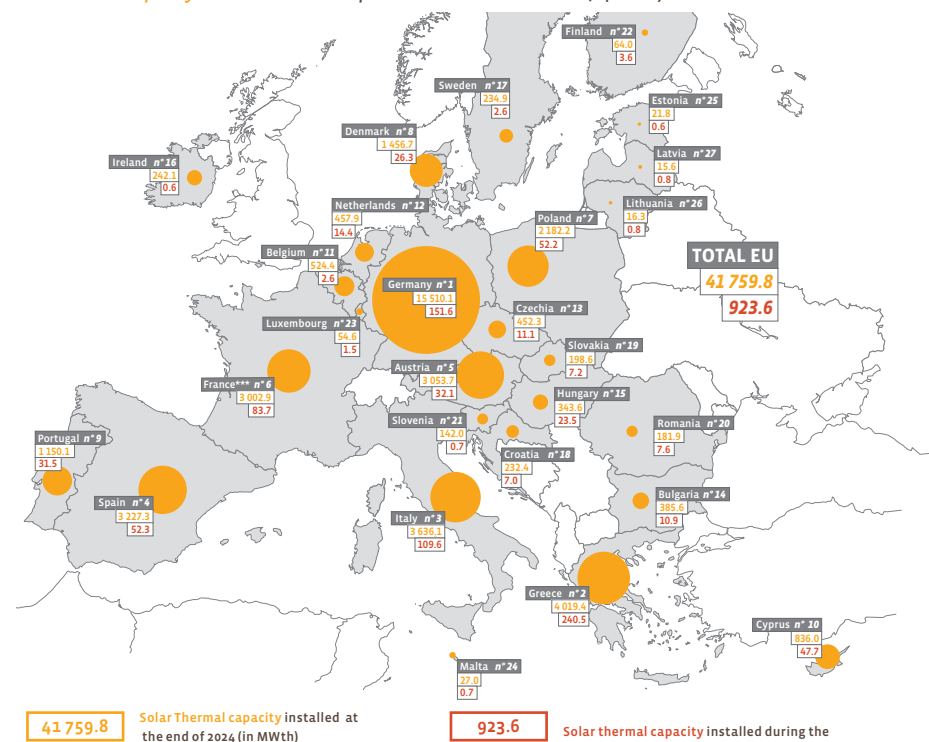
ENGLISH: <https://www.eurobserv-er.org/category/all-solar-thermal-and-concentrated-solar-power-barometers/>

Solar thermal

Slowdown contagion spread to the main European Union solar thermal markets, including the Greek market, said to be its most stalwart, and depressed 2024 sales. The previous year's 21.1% drop in collector surface worsened to 30.2%. In 2024, just over 1.3 million m² of collectors were installed – almost 570 000 m² less than in 2023. Many mainly residential segment-related factors contributed to this 100% European technology's ill

fortunes. Examples are the Europe-wide sluggish heating and construction markets, the dilution and suspension of several energy renovation aid policies, and increased competition from the expanding photovoltaic self-consumption segment. Announcements of new mega-projects in a number of European countries mean that the very large installation segment is taking shape.

Solar thermal capacity installed in the European Union at the end of 2024* (MWth)



* All technologies included unglazed collectors. ** Estimation. *** Overseas departments included for France
Source: EurObserv'ER 2025.

Concentrated Solar Power

Recent EU concentrated solar thermal projects have been geared to industrial heating needs. Currently, construction work is nearing completion on just two Fresnel type CSP solar plants in Sicily.

59.7 MILLION M²

The cumulated surfaces of solar thermal in operation in the European Union in 2024

2 333.1 MWe

Total CSP capacity in operation in the European Union in 2024

Cumulated capacity of thermal solar collectors* installed in the European Union in 2024** (in m² and in MWth)

| Country | 2024 m ² | 2024 MWth |
|-------------|---------------------|-----------|
| Germany | 22 157 290 | 15 510.1 |
| Greece | 5 870 500 | 4 109.4 |
| Italy | 5 194 476 | 3 636.1 |
| Spain | 4 610 423 | 3 227.3 |
| Austria | 4 362 423 | 3 053.7 |
| France | 4 289 850 | 3 002.9 |
| Poland | 3 117 418 | 2 182.2 |
| Denmark | 2 081 042 | 1 456.7 |
| Portugal | 1 643 054 | 1 150.1 |
| Cyprus | 1 194 230 | 836.0 |
| Rest of EU | 5 136 206 | 3 595.0 |
| Total EU 27 | 59 656 912 | 41 759.5 |

* All technologies included unglazed collectors. ** Estimation. Note: Some countries like France, Austria and Spain include PVT hybrid systems in their cumulated capacity of solar thermal collectors.
Source: EurObserv'ER 2025.

FURTHER INFORMATION

ANNUAL REPORT: "The State of renewable energies in Europe", 23rd edition, www.eurobserv-er.org/23rd-annual-overview-barometer

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The next barometer will be about geothermal energy.

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