



# Geothermal Market in Europe

*Launch of the EGEC Geothermal*

*Market Report 2013/2014*

*@ GeoPower / Geoheat Congress 2013*

**Philippe DUMAS, EGEC Secretary general**

**EGEC**  
EGEC MARKET REPORT 2013/2014



**EGEC**  
GEOHERMAL

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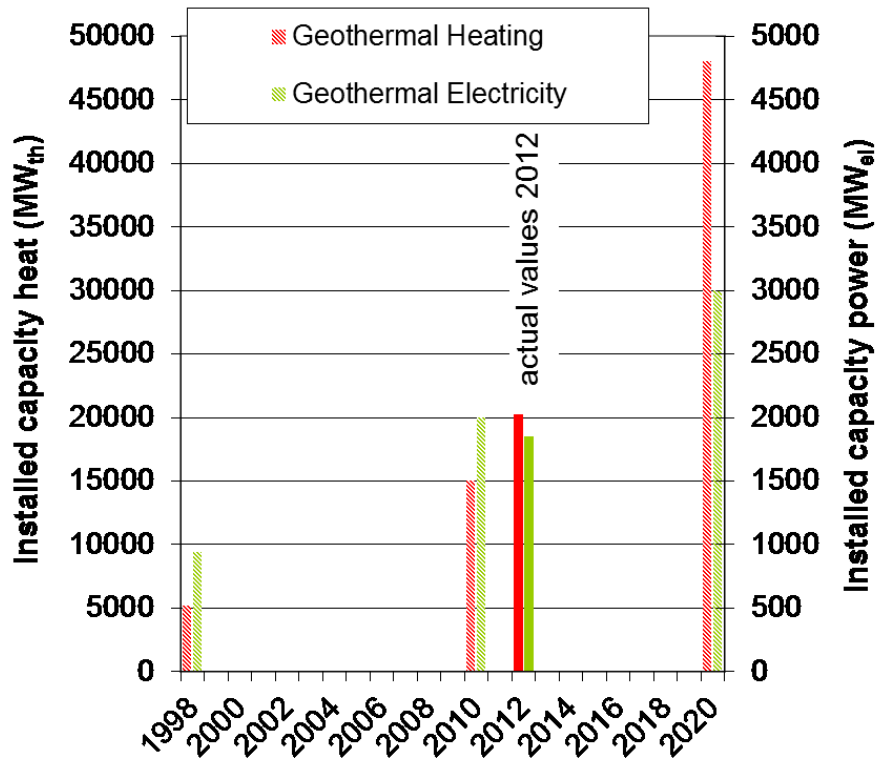
# 3 parts:

**Geothermal Electricity**

**Geothermal District heating**

**Shallow Geothermal**

# From the Ferrara Declaration



**On track but...We urgently need a stable political and regulatory framework to achieve the targets for 2020, 2030 and beyond!**



# Summary of Key Conclusions Electricity

## State of Play in 2013

- Total Installed Capacity in Europe: 1.85 GWe  
(+145 MWe in 2013)
- Producing 11,7 TWh of Electric Power

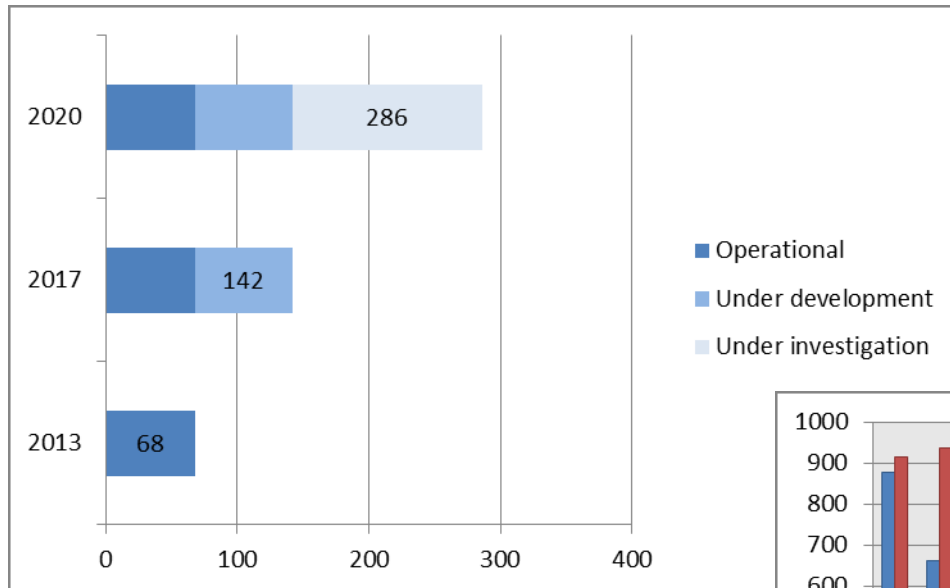
## 68 Geothermal Power Plants

- 8 new power plants in 2013
- EU Installed Capacity of 0.945 GWe



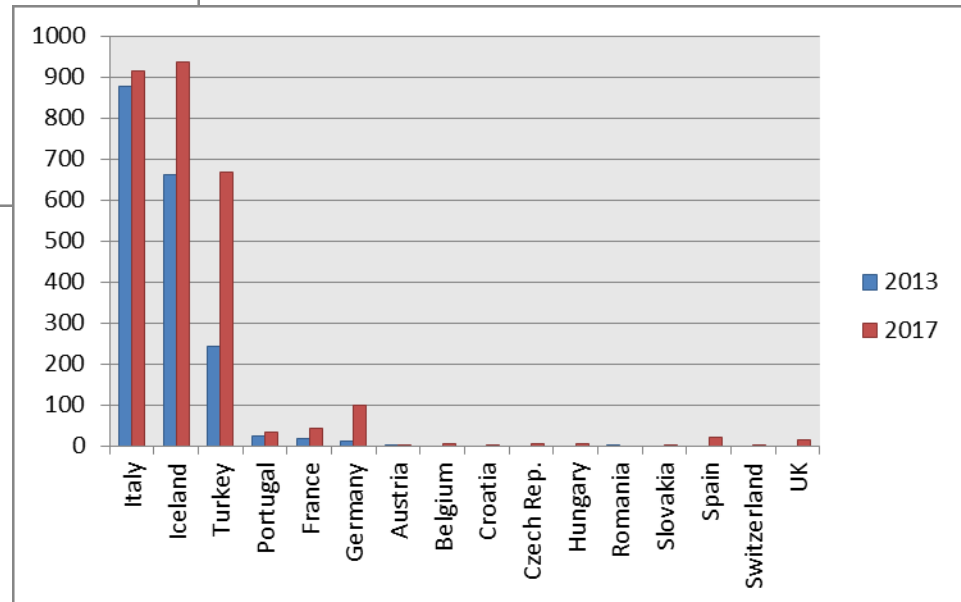
# Installed Capacity per Country

*Looking to next 5 years...*



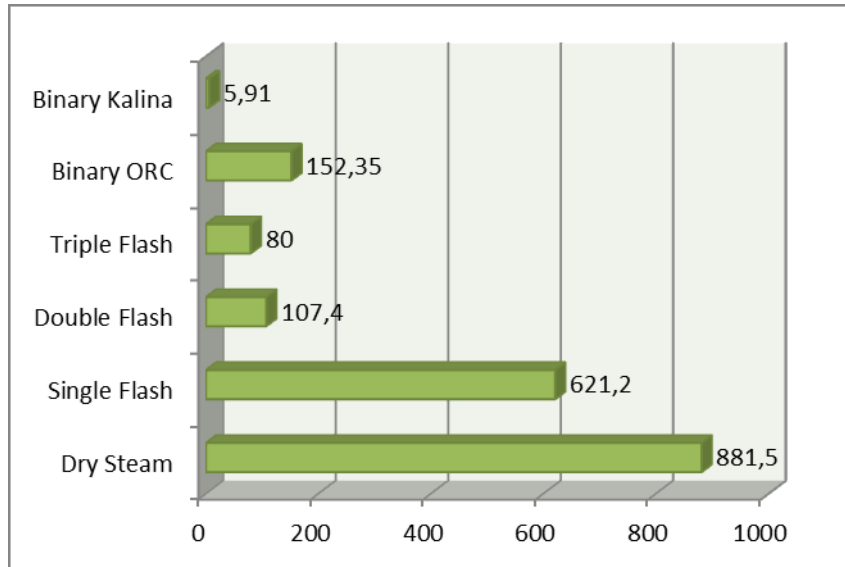
Number of geothermal power plants in Europe  
**(+50 new projects under investigation !)**

Installed capacity per country (MWe)

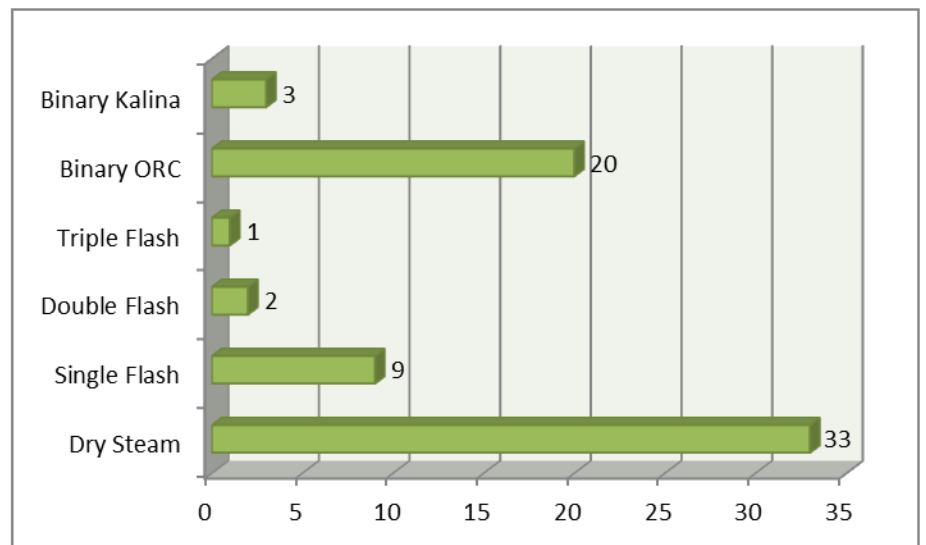




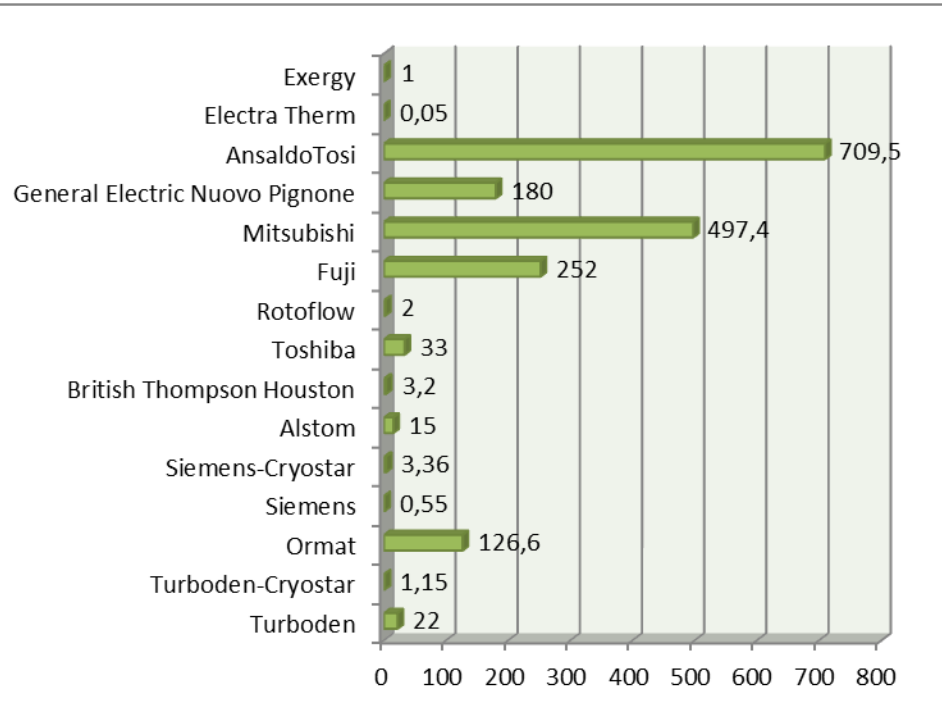
# Focus on the Turbines



Number of power plants per technology

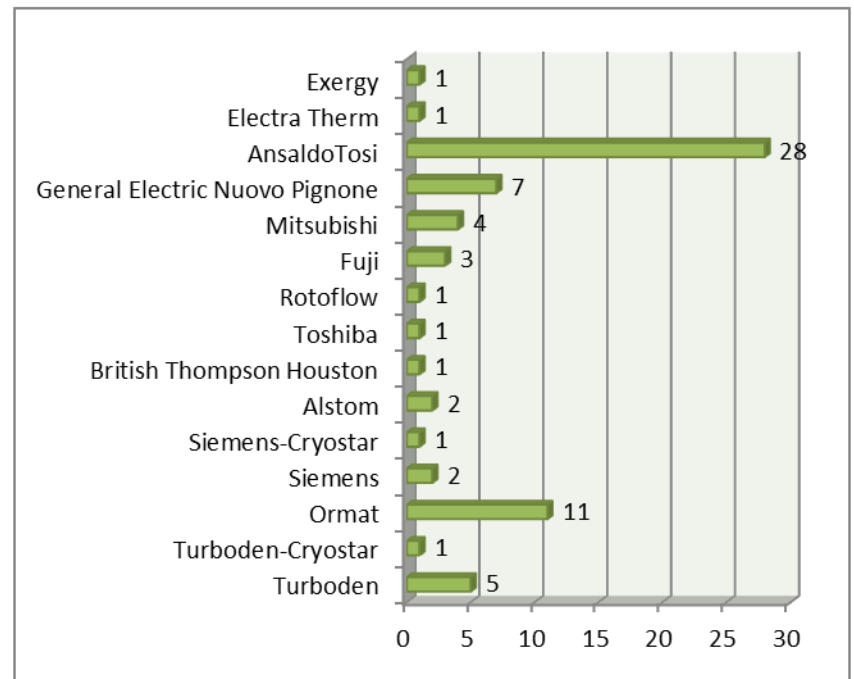


# Focus on Turbine manufacturers



**Number of power plants per manufacturer**

## Installed capacity (MWe) per manufacturer





# Summary of Key Conclusions District Heating

## State of Play in 2013

- Total Installed Capacity in Europe: 4.3 GWth (+122 MWth in 2013)
- Producing 12883 GWh of thermal Power

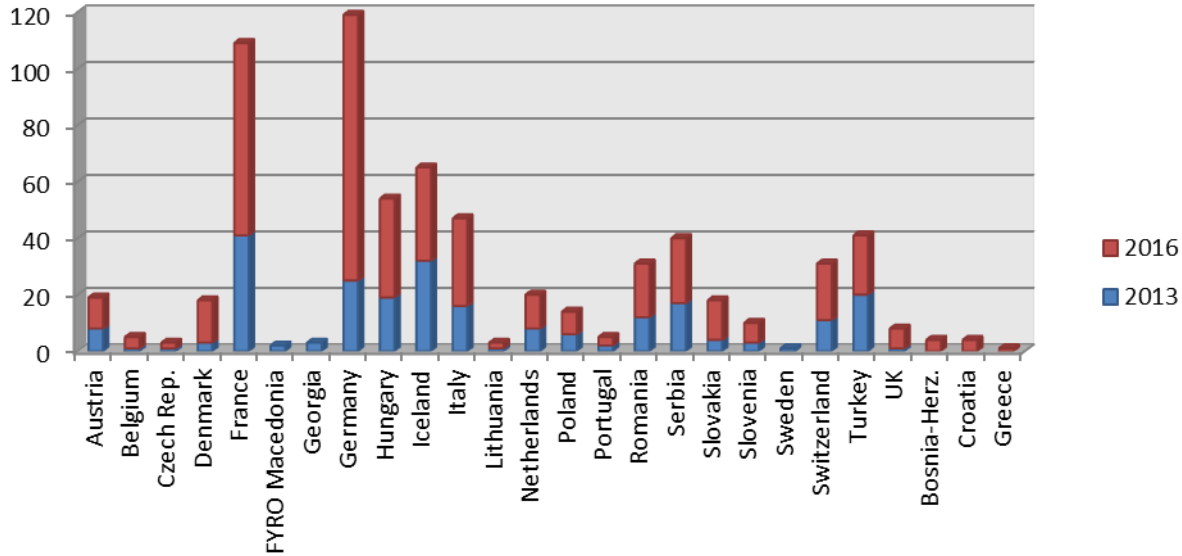
## 237 Geothermal DH Plants

- 11 new GeoDH plants in 2013 + 4 triplet systems
- EU Installed Capacity of 1.1 GWth



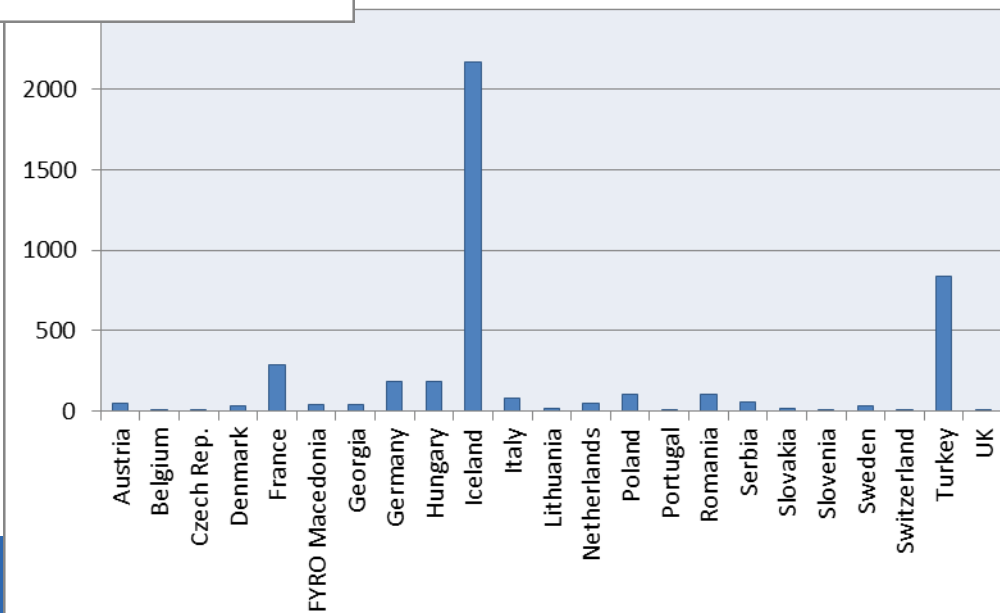
# Installed Capacity per Country

*Looking to next 4 years...*



Number of geoDH systems in Europe

Installed capacity per country (MWth)

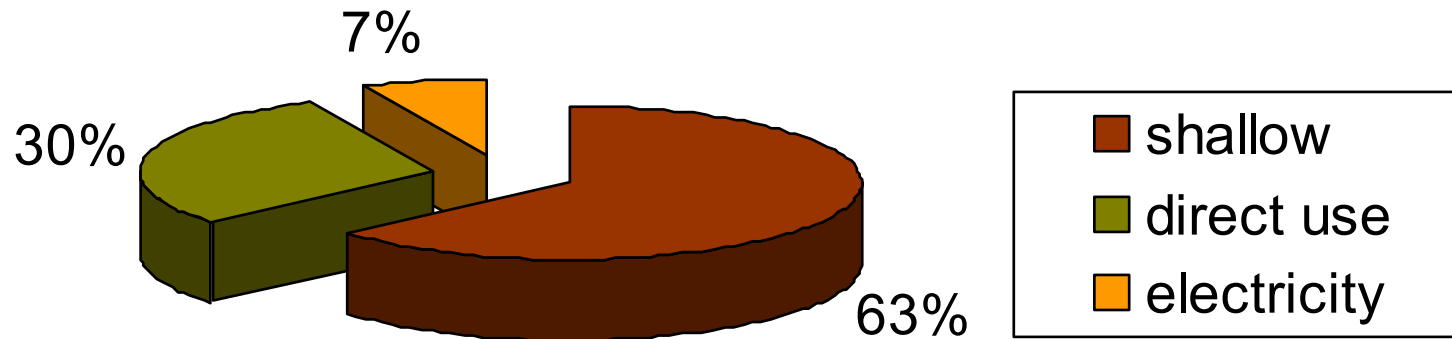


# Summary of Key Conclusions

## Shallow geothermal

### State of Play in 2013

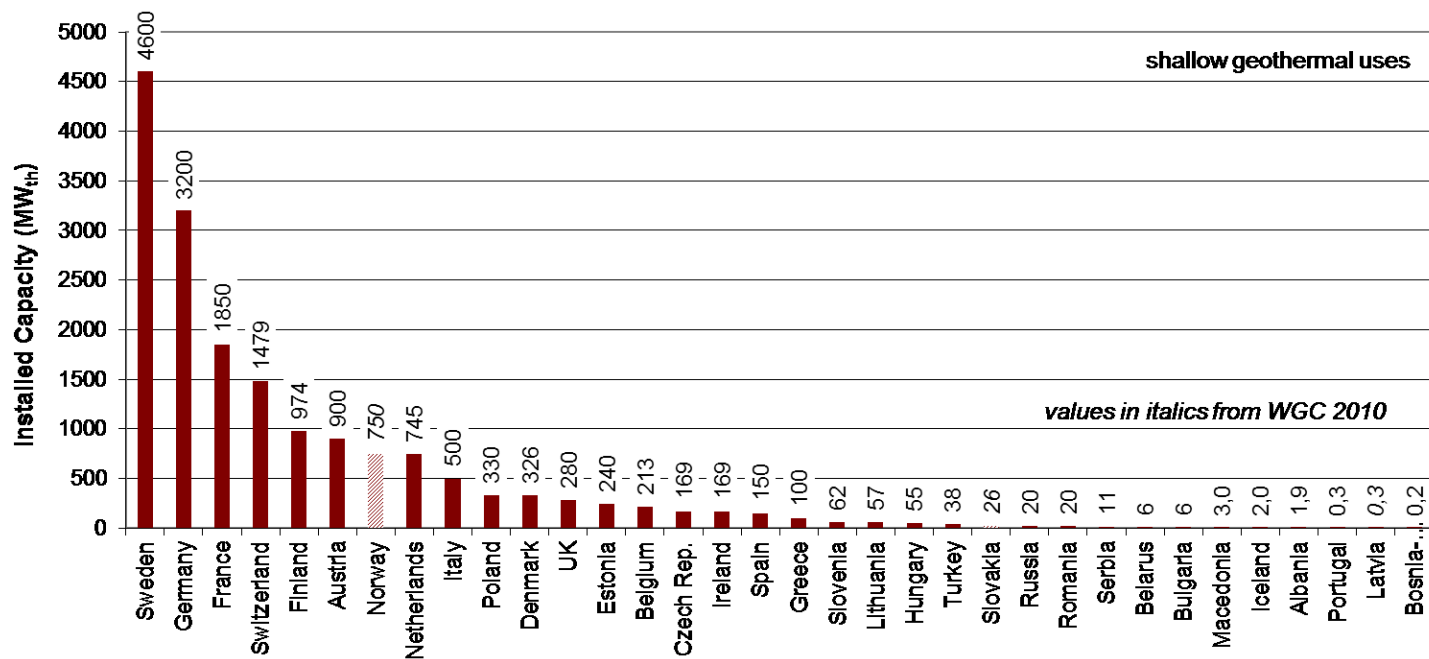
- Shallow geothermal – the largest sector in terms of installed capacity



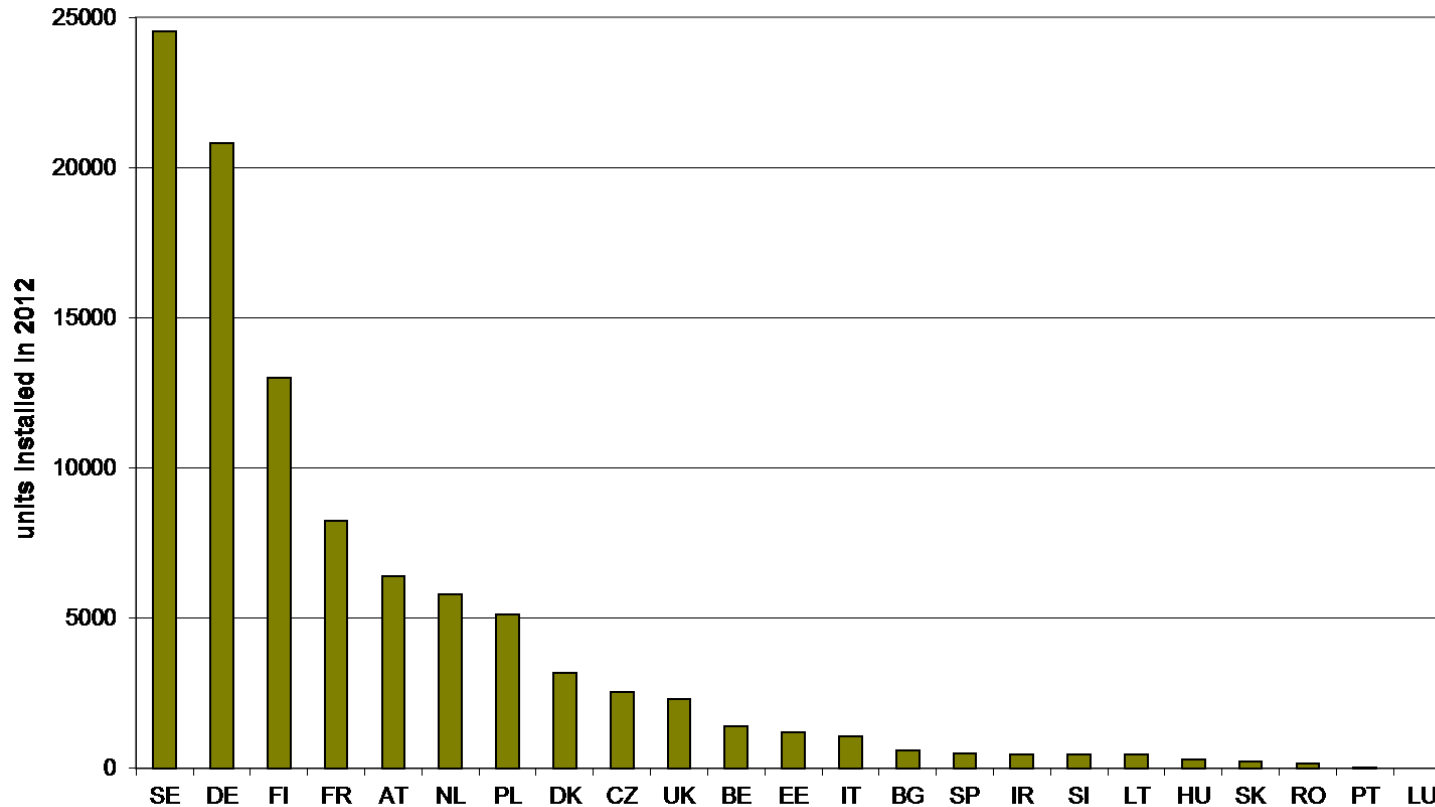
# Summary of Key Conclusions Shallow geothermal

## State of Play in 2013

- Total Installed Capacity in Europe: 17000 MW<sub>th</sub>
- 1.2 Mio GSHD installed

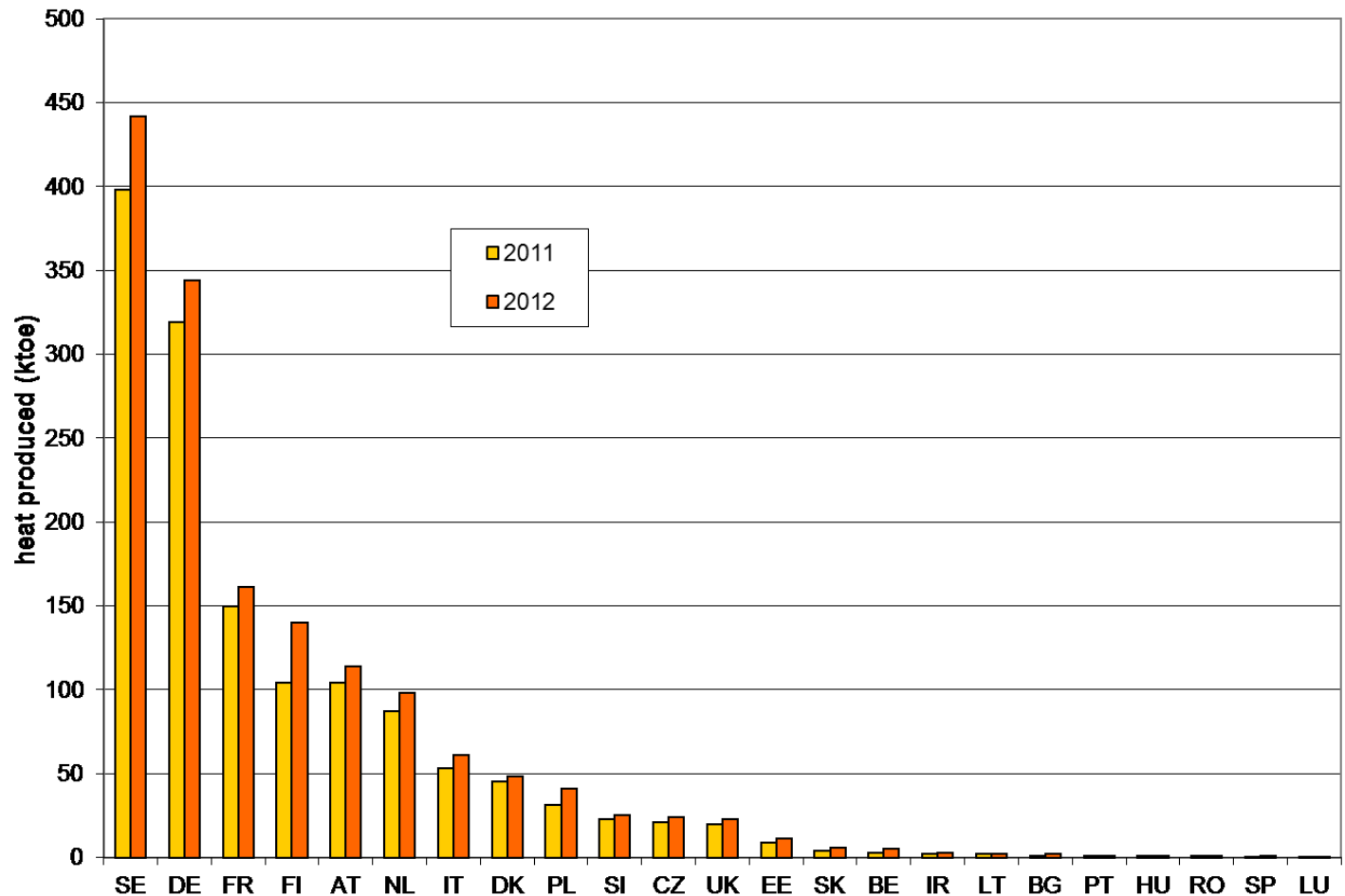


# Market development



**Number of GSHP units sold in the EU in 2012**  
(data based on Eurobserv'ER)

# Market development



Renewable heat produced in 2011 and 2012 in the EU by geothermal heat pumps (data based on Eurobserv'ER)



# 3rd Geothermal Market Report

**The only full and detailed analysis  
of the geothermal sector in Europe**

**Available for €250**

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and VIP attendees of GeoPower  
Global Congress.**

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