

Geothermal Market in Europe

EGEC Geothermal Market Report 2015

Philippe DUMAS, EGEC Secretary general



4 parts:

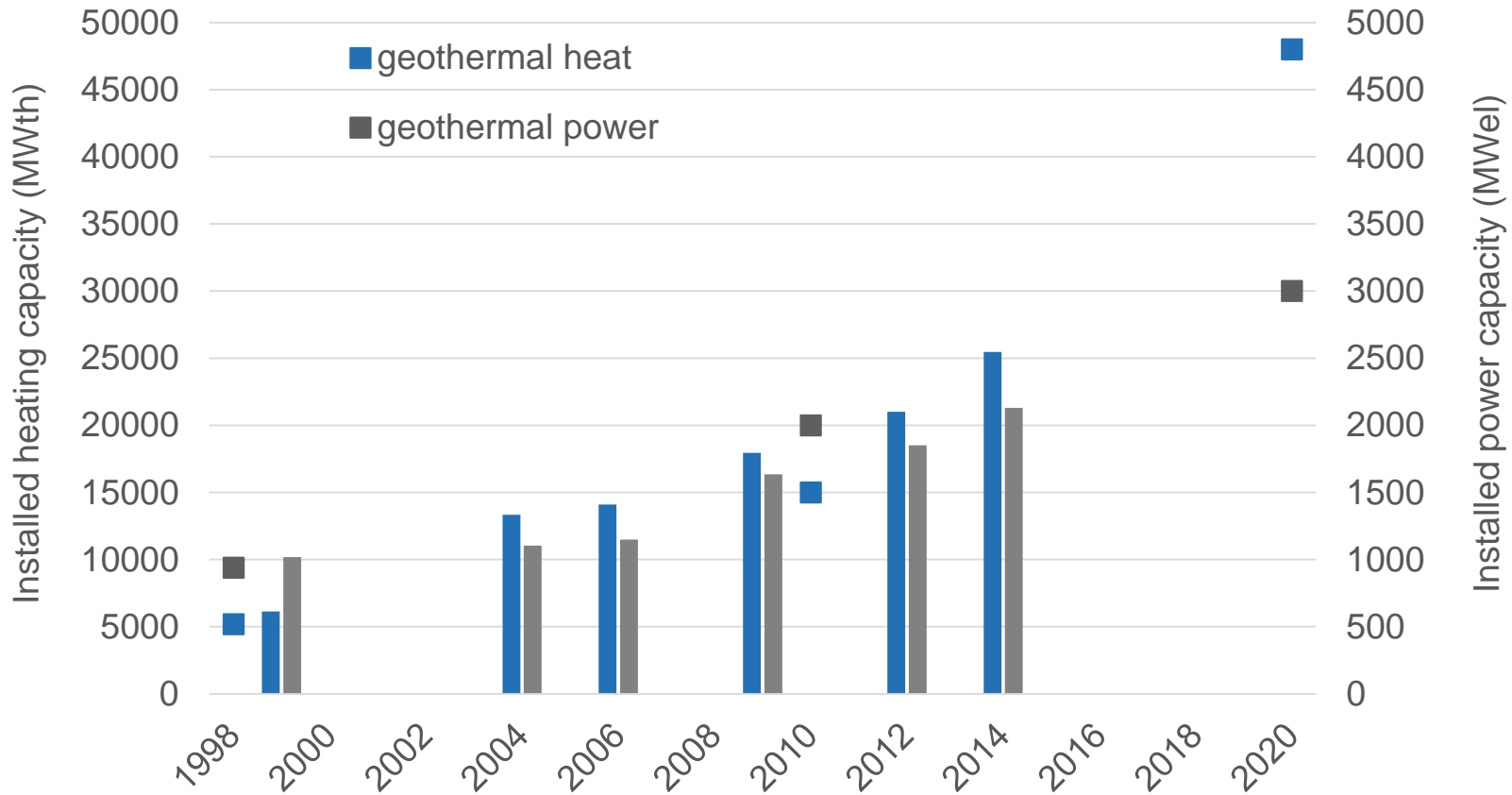
Geothermal Electricity

Geothermal District heating

Technology

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 2015

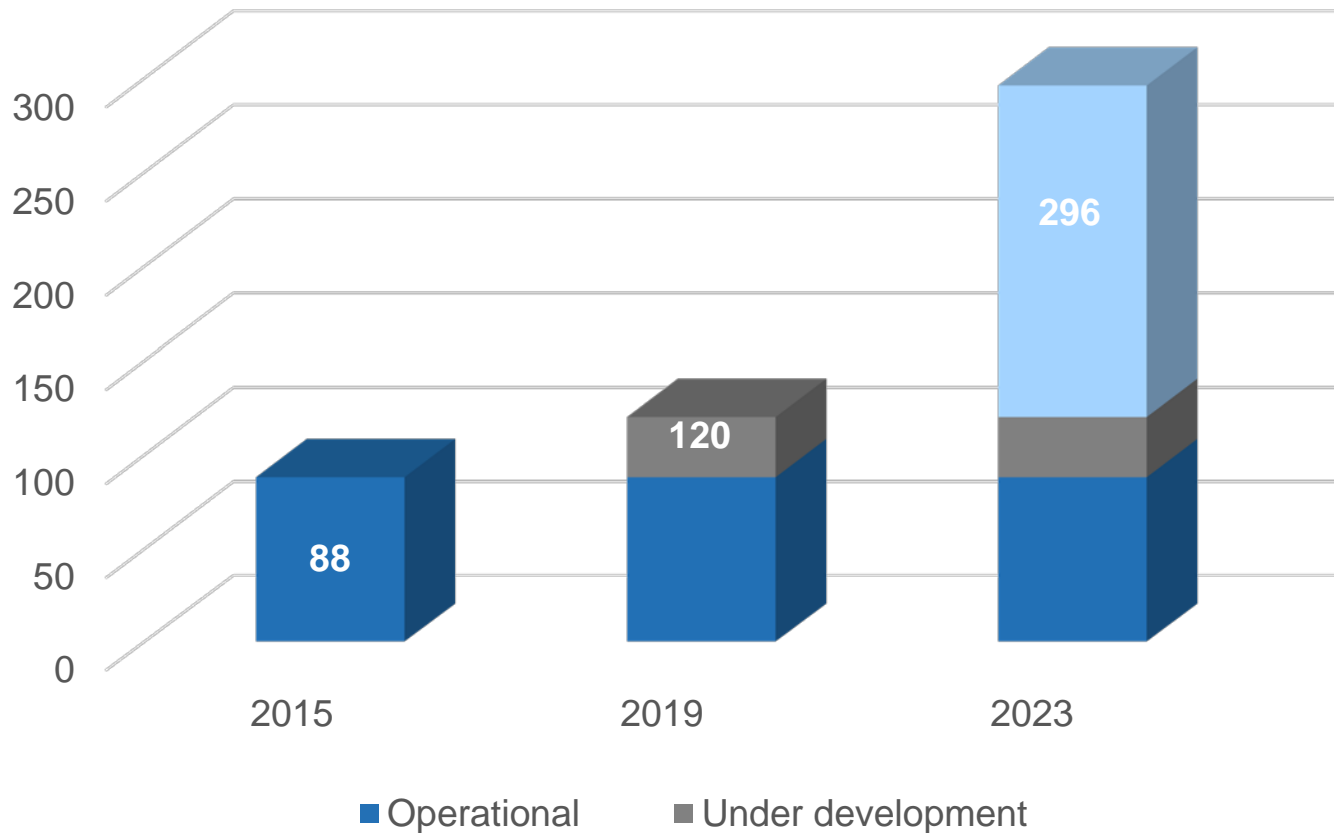
- Total Installed Capacity in Europe: 2285 MWe
- Production in Europe in 2014: 12 TWh

88 Geothermal Power Plants

- 16 new power plants were commissioned in 2014 and 2015 (14 in TK, 1 in IT, 1 in DE)
- EU Installed Capacity of 991 MWe

Summary of Key Conclusions

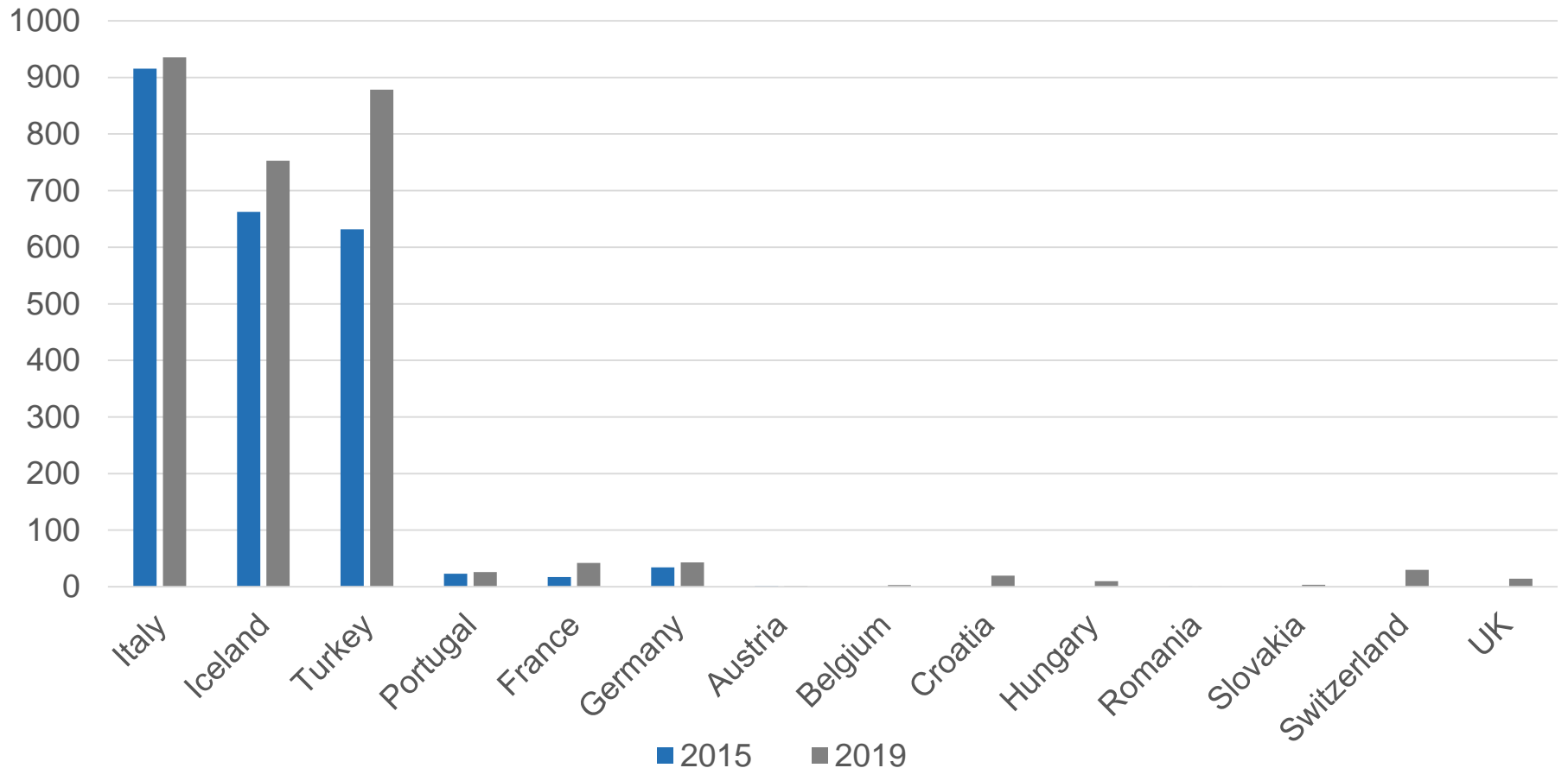
Electricity



Number of geothermal power plants in Europe

Summary of Key Conclusions

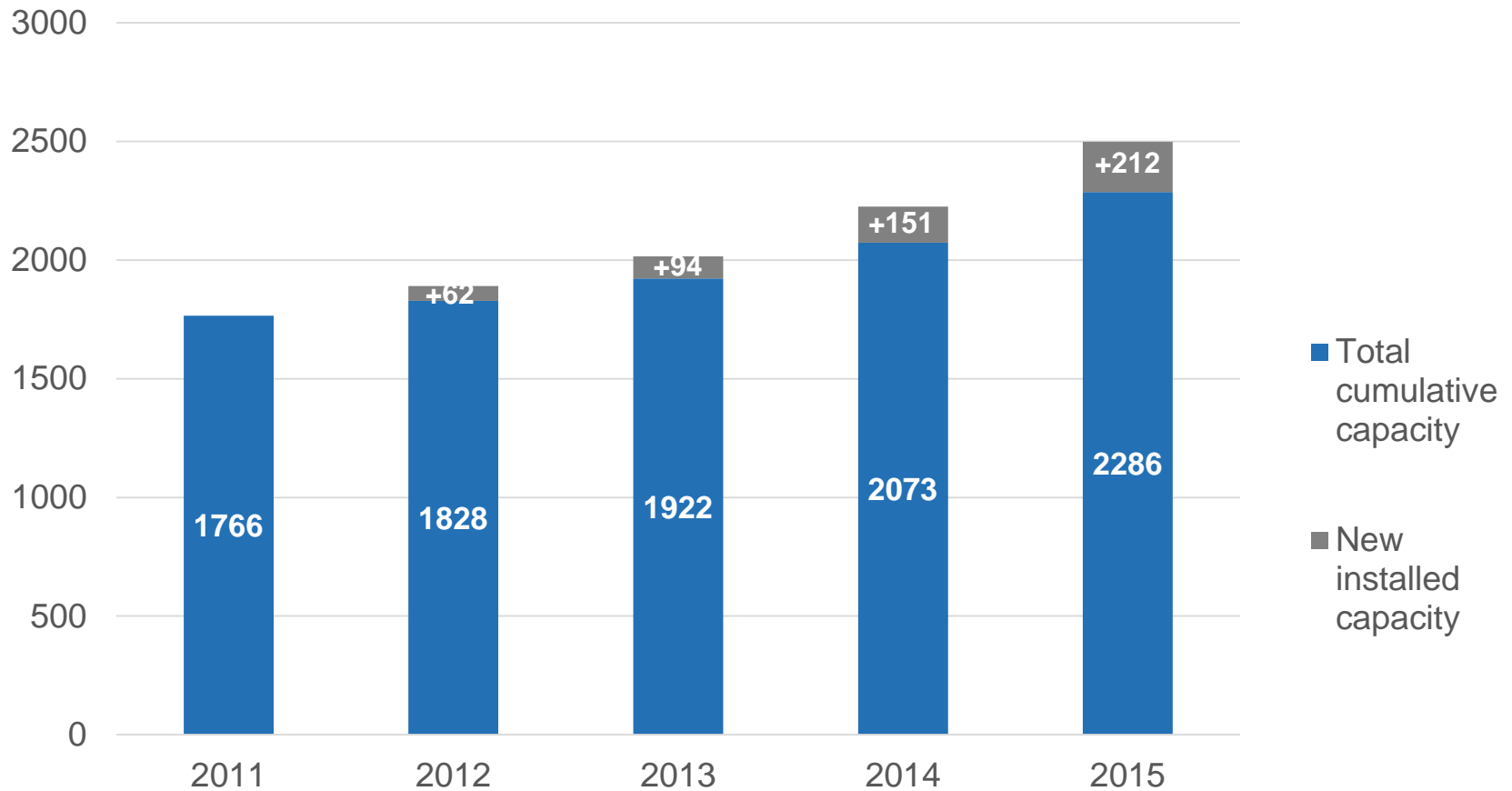
Electricity



Installed capacity per country in Europe – (MWe)

Summary of Key Conclusions

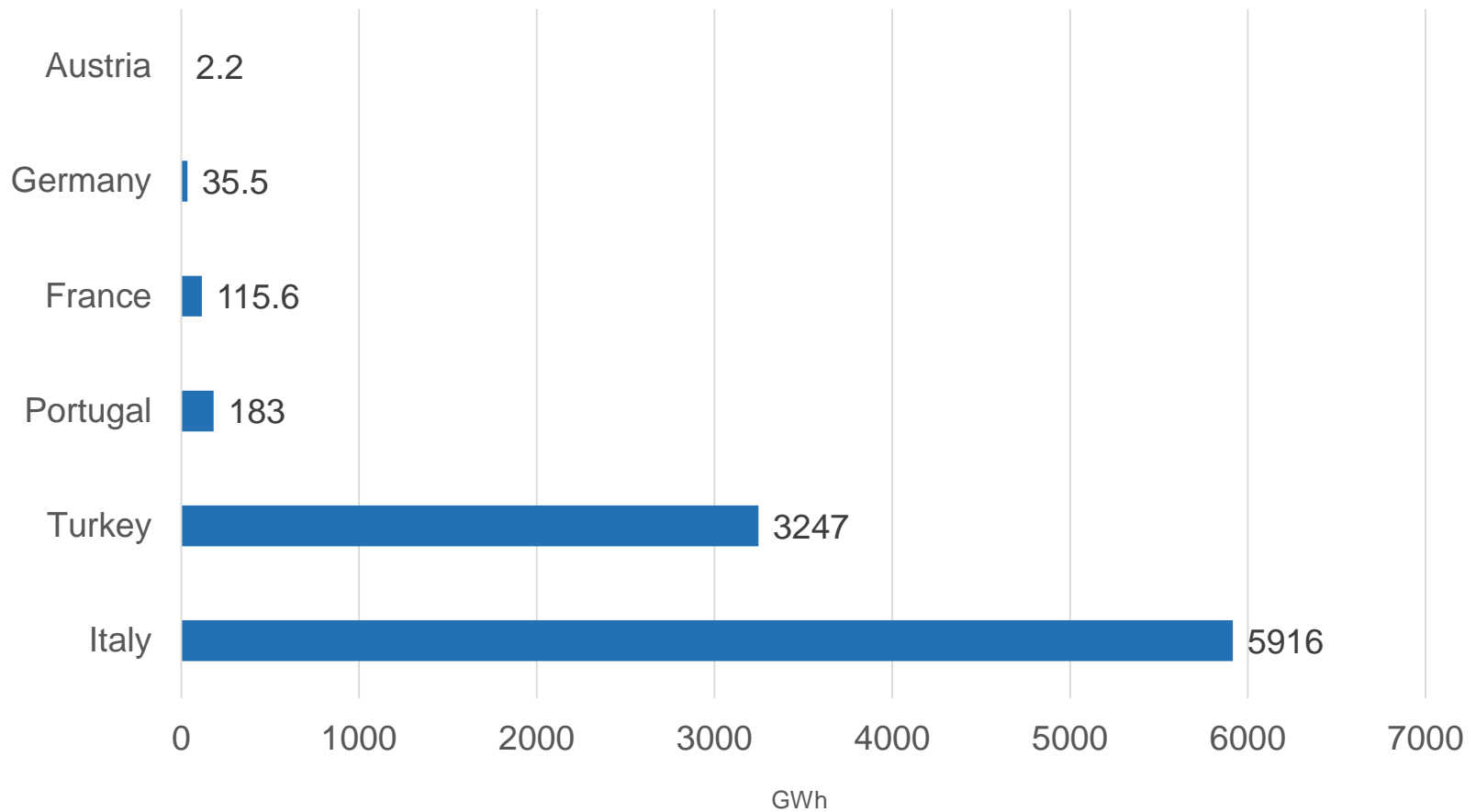
Electricity



Cumulative installed capacity in Europe – (2011-2015 MWe)

Summary of Key Conclusions

Electricity

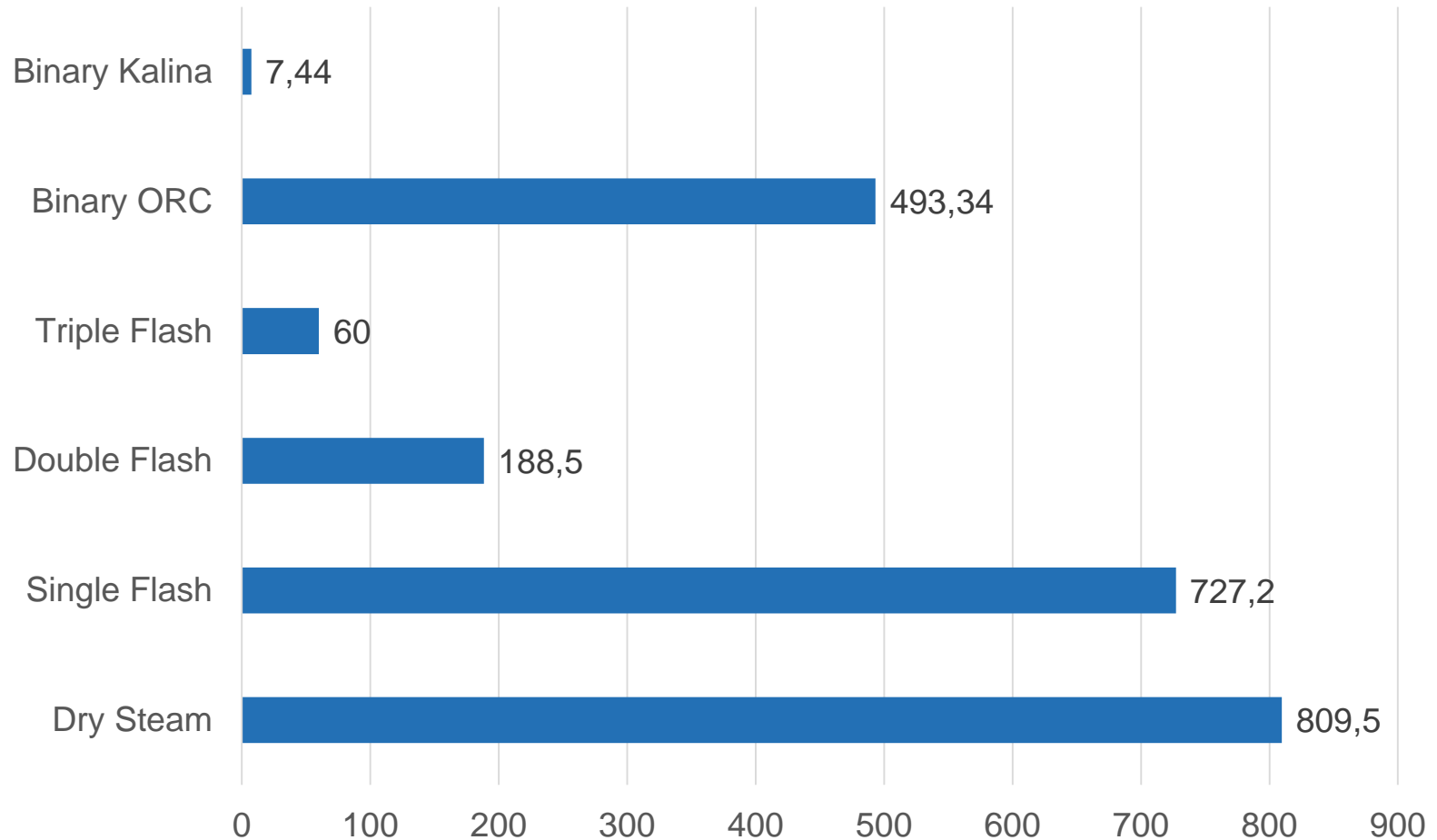


Gross electricity production (GWh) in selected countries in 2014

Map of EGS projects

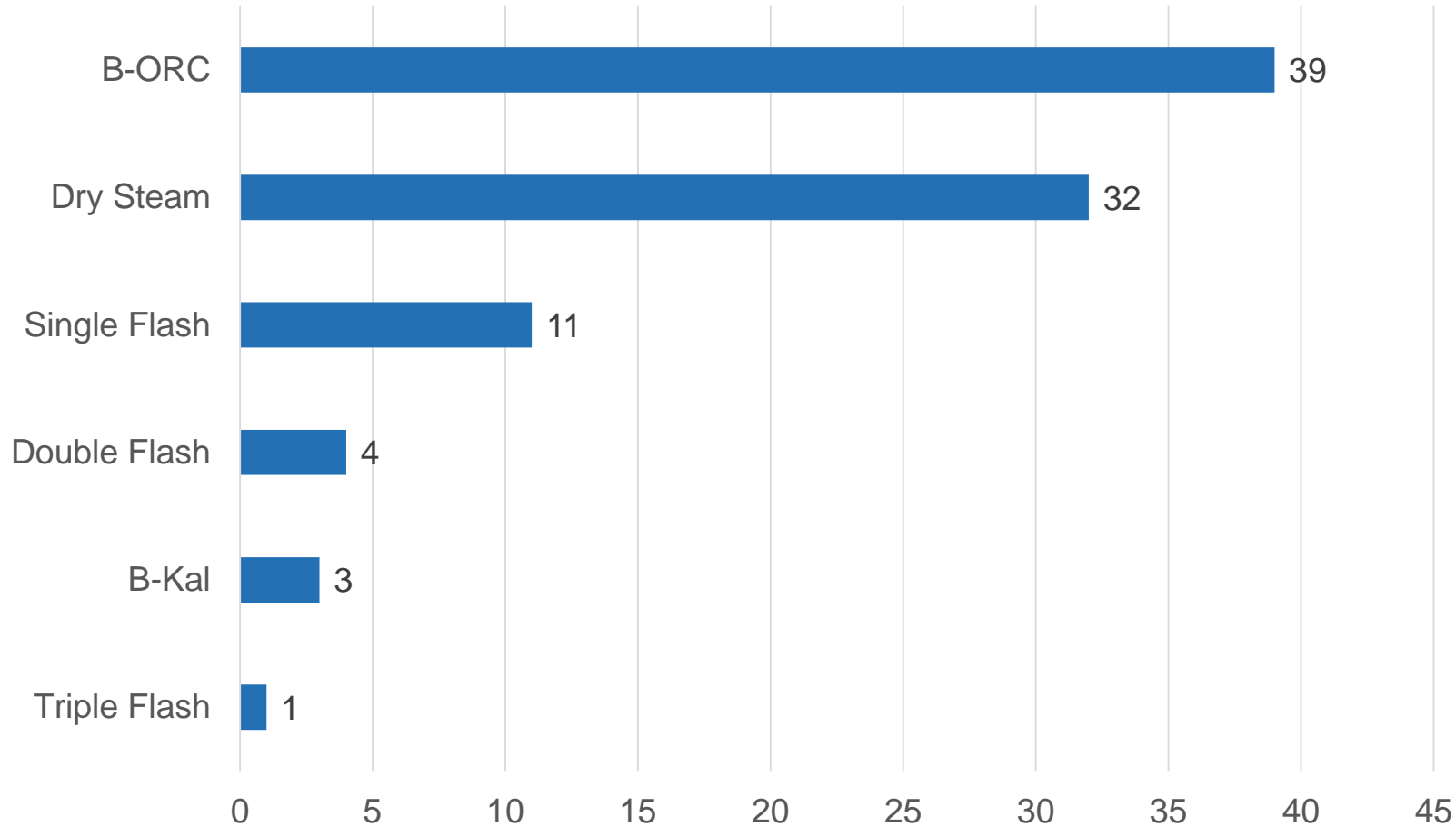
ONLY AVAILABLE IN FULL REPORT

Focus on Turbines Technology



Installed capacity (MWe) per technology

Focus on Turbines Technology



Number of power plants/turbines per technology in 2015

Focus on Turbine **manufacturers**

ONLY AVAILABLE IN FULL REPORT

Summary of Key Conclusions

District Heating

State of Play in 2015

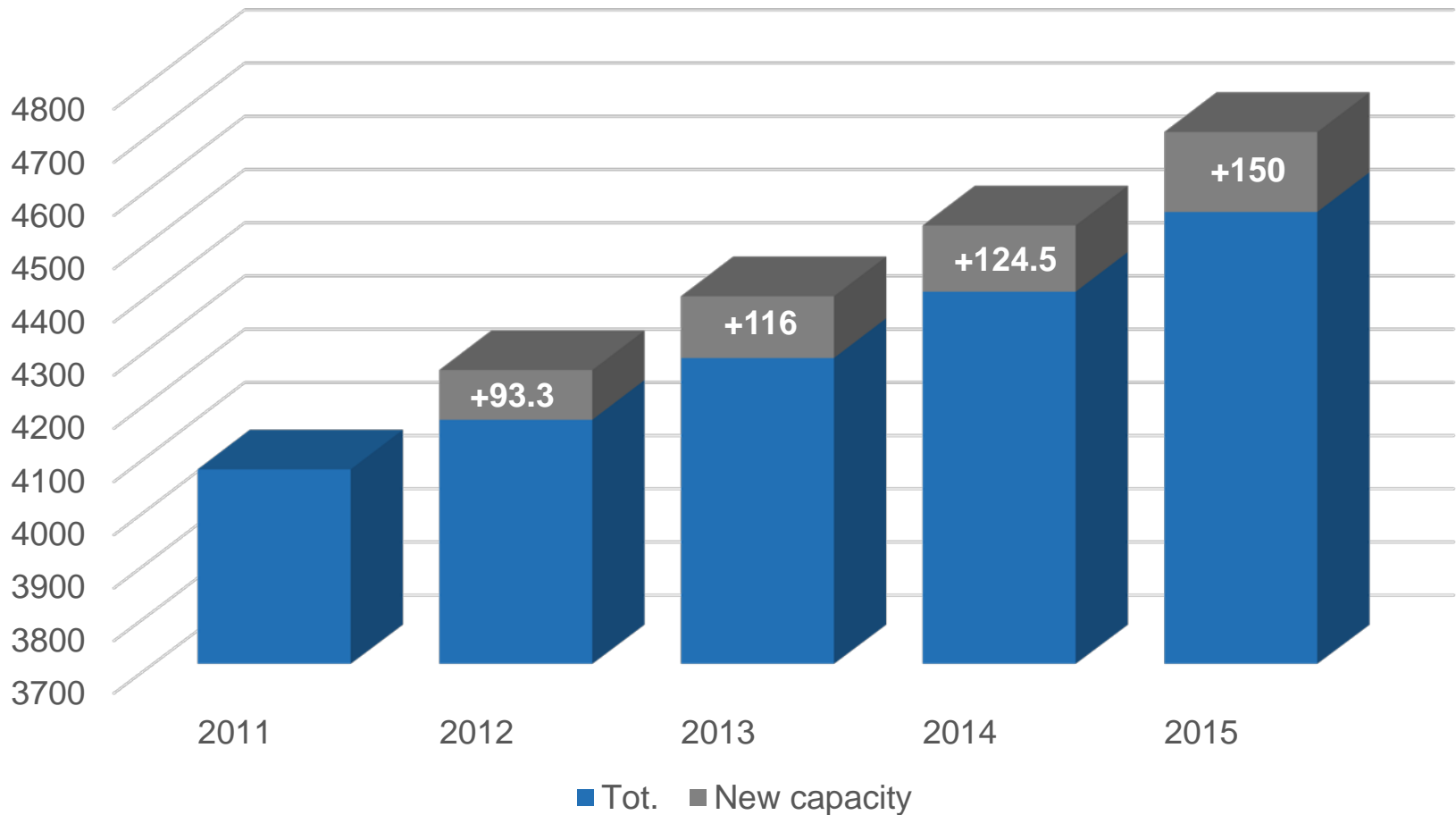
- Total Installed Capacity in Europe: 4701.7 MWth

257 Geothermal DH Plants

- 23 new district heating plants were commissioned in 2014 and 2015
- EU Installed Capacity of 1551.8 MWth / 177 Geothermal DH plants

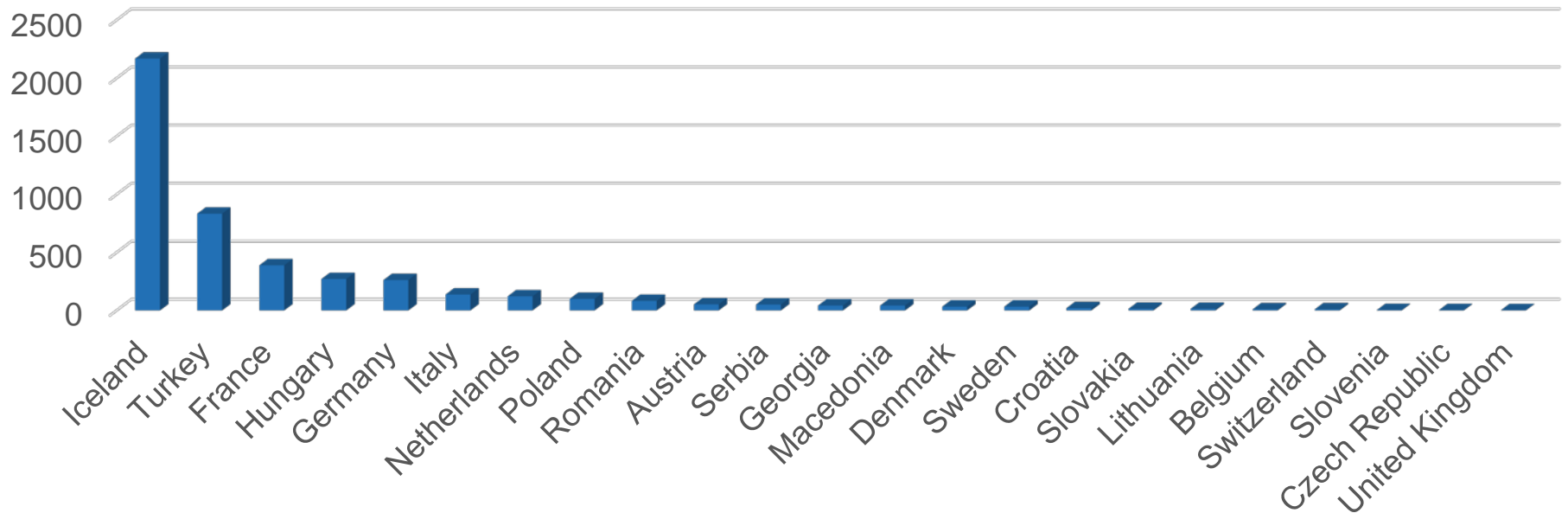
Summary of Key Conclusions

GeoDH



Cumulative installed capacity in Europe 2011- 2015 (MWth)

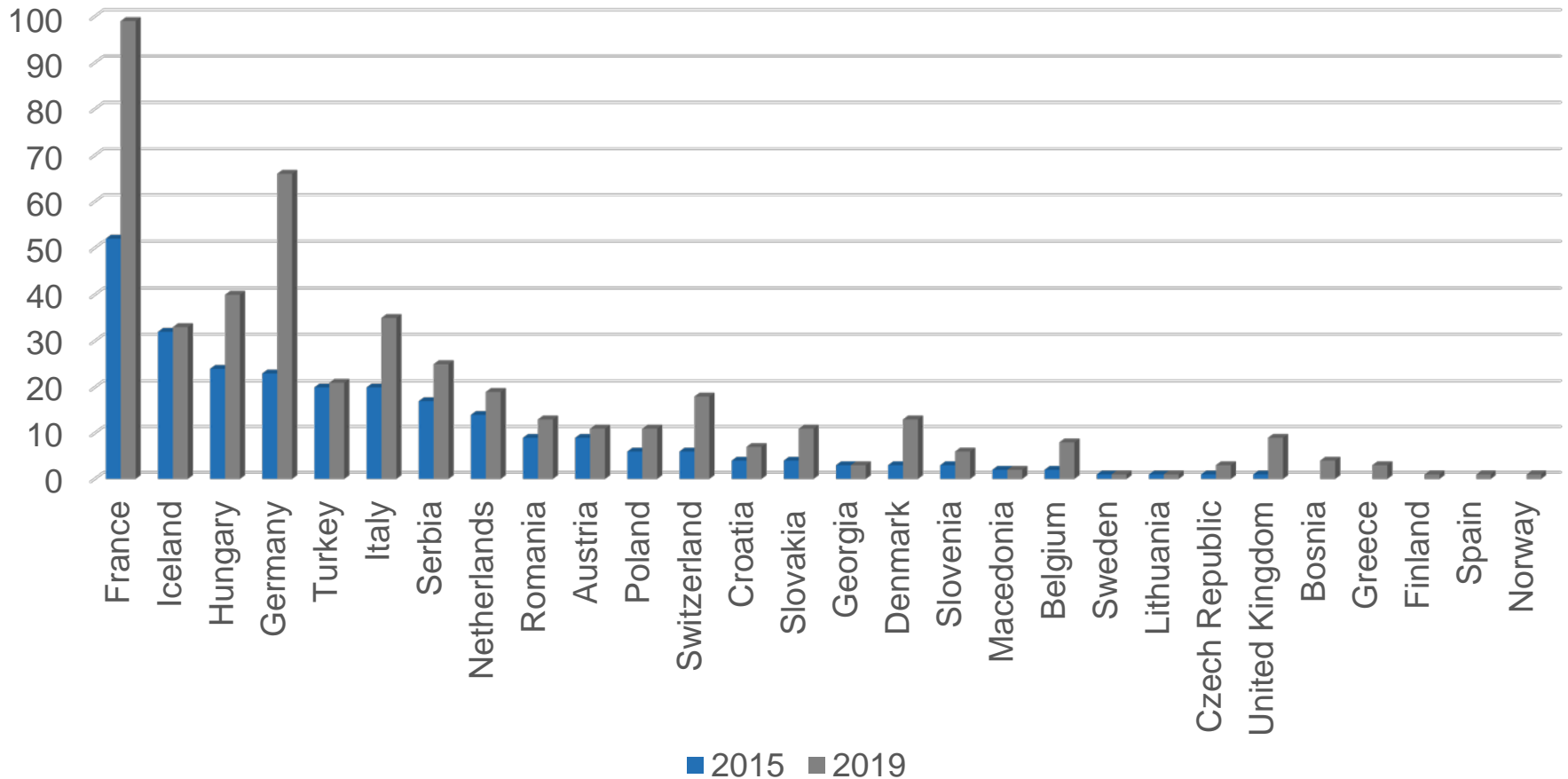
Installed Capacity per Country



Geothermal DH capacity installed in Europe, per country in 2015 (MWth)

Number of GeoDH systems

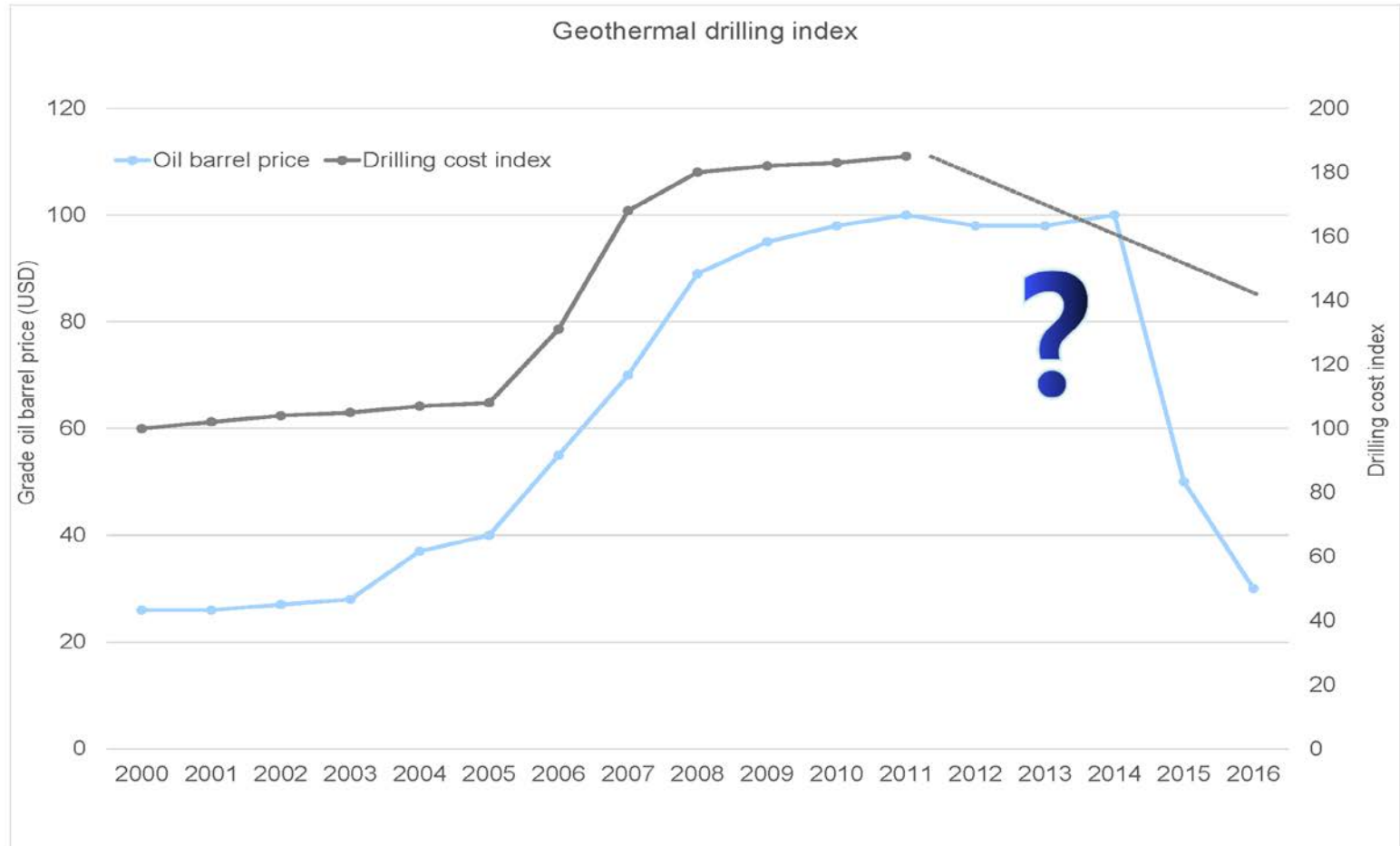
Looking to the next years...



Number of geoDH systems in Europe in 2015 and 2019

Technology

Focus on drilling



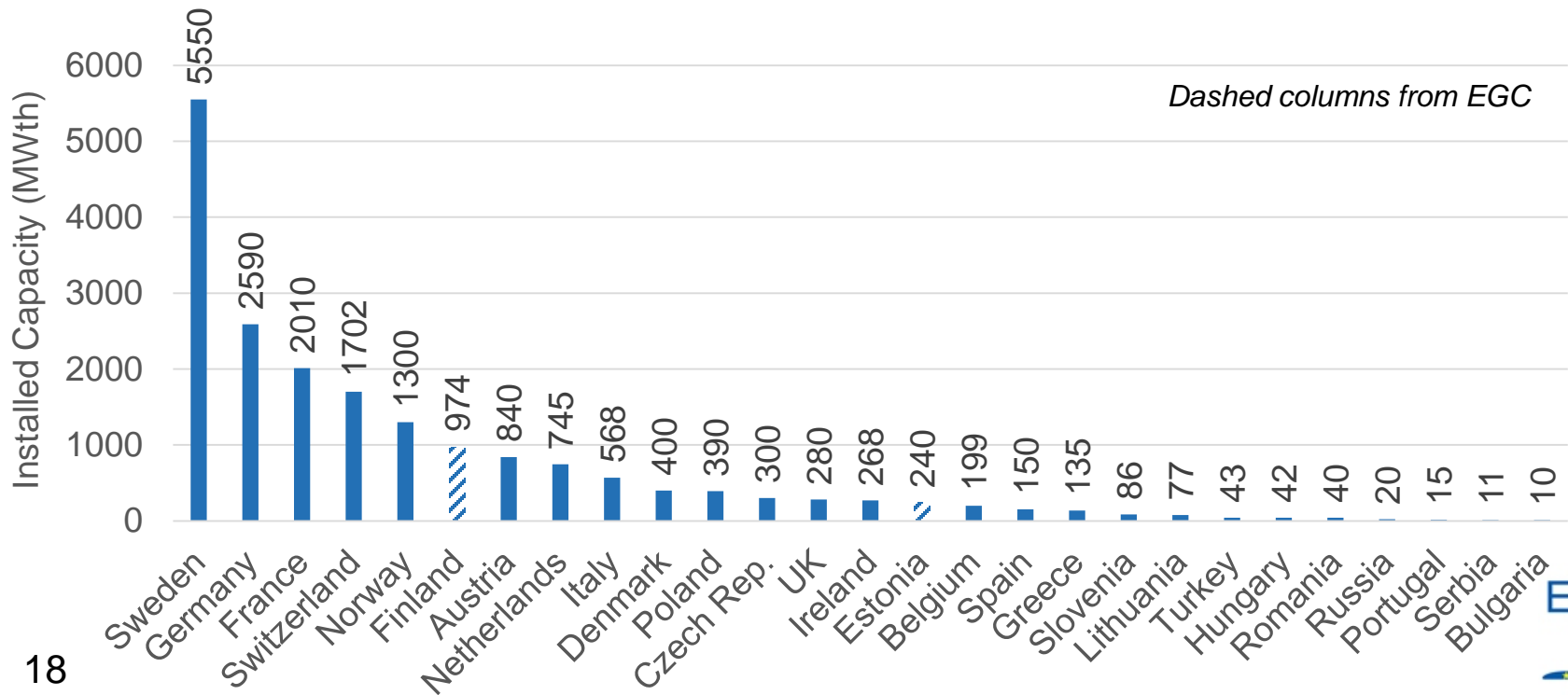
Drilling – Geothermal drilling index 2000 - 2016

Summary of Key Conclusions

Shallow geothermal

State of Play in 2014

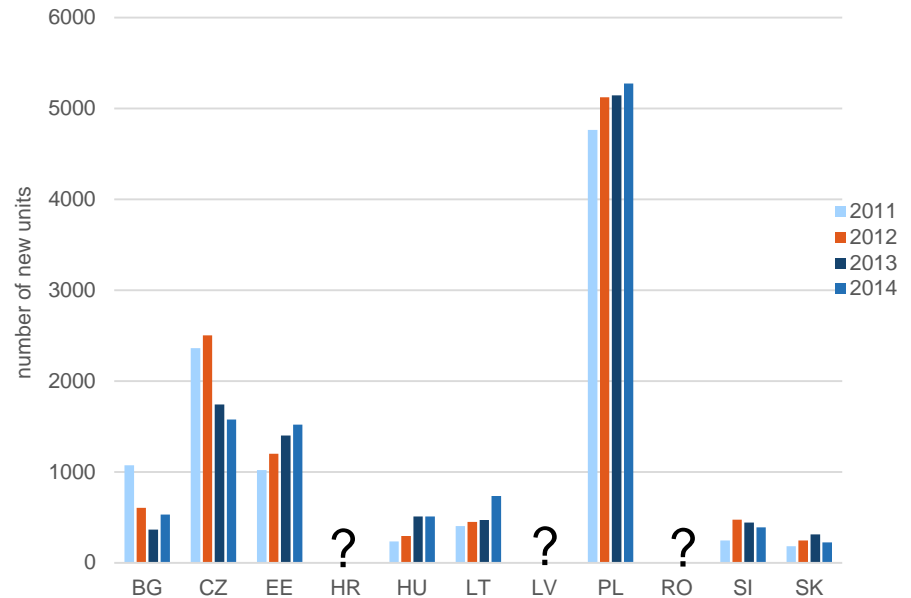
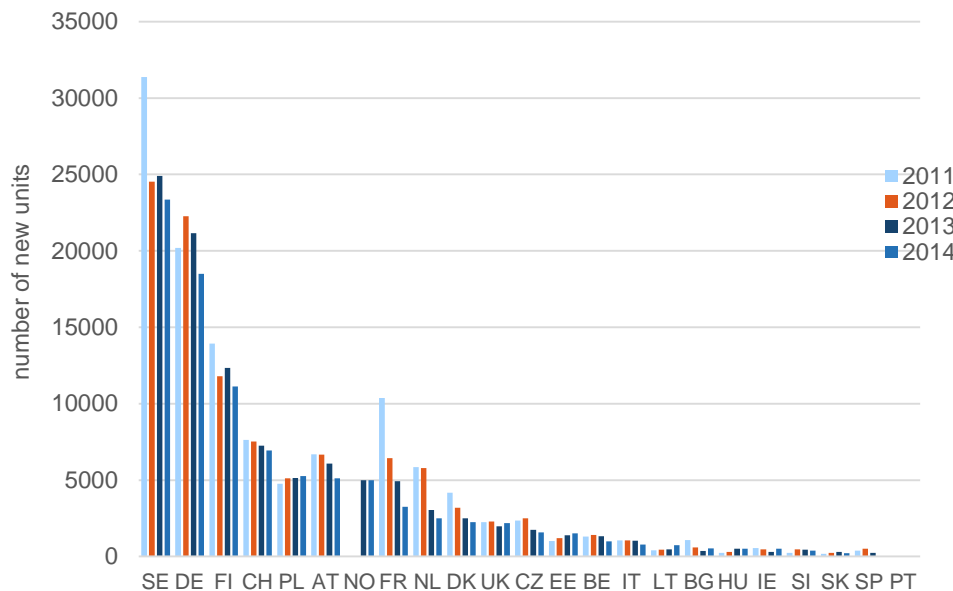
- Total Installed Capacity in Europe: ca.19000 MWth
- Five countries alone account for ca 69% of all installed capacity in Europe



Summary of Key Conclusions

Shallow geothermal

More than 1.4 Mio GSHP installed



Sales numbers for geothermal heat pumps in Europe, for EU countries and countries from Central and Eastern Europe

EGEC Geothermal Market Report

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

Available for free

First results given for free to EGEC members and VIP attendees of GeoPower Global Congress.

5th edition Geothermal Market Full Report available in April 2016

