



Solar Heat Market developments in Europe

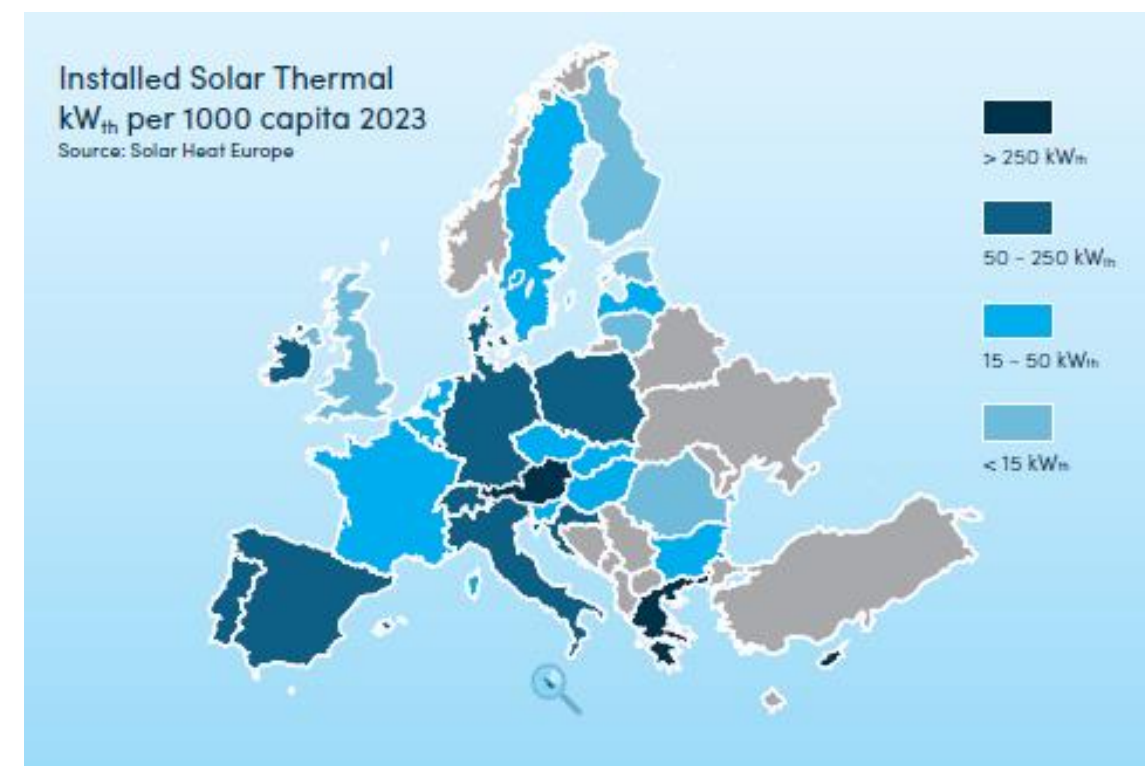
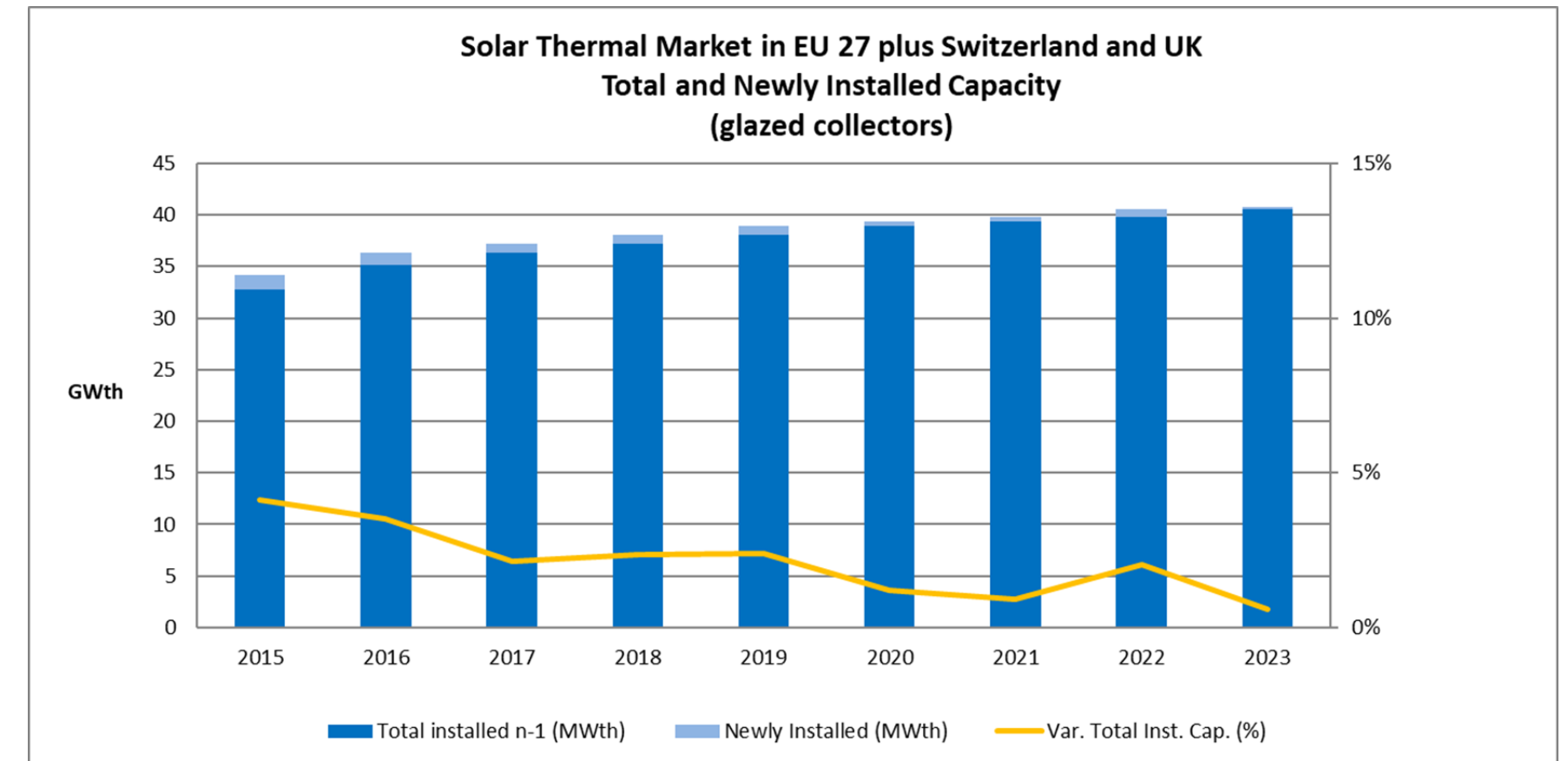
IEA SHC Solar Heat Worldwide webinar, 24-26 June 2025

A too slow growth for all RES heat sectors

and 2024

2023 was marked by:

- Lower investments due to higher interest rates leading also to a lower-than-expected pace of heat modernisation across Europe
- Unstable policy signals regarding fossil fuels and the decarbonisation of heating and cooling
- Stop and go market effect in some countries, due to inconsistent public policies and subventions
- A reduction of the gas prices and of the ETS carbon price (for industry), hampering the transition towards more sustainable supplies
- A fierce competition amongst heating and cooling technologies
- Dumping practices of solar PV panels, with very low prices indirectly affecting solar thermal sales
- Yet, a growing installed capacity for all Solar Thermal market segments and great new large scale projects commissioned, including growing share of some innovative technologies (e.g. solar PVT)



*If most Europeans would equip themselves as well as Austrians, Danes, or Greeks currently do, the installed capacity would easily move from **41 Gwth** to **154 Gwth!!***

A supportive EU regulatory framework, now to be implemented in 27 countries



EU Fit for 55: An opportunity for Solar Thermal

Energy Efficiency Directive	Renewable Energy Directive	Energy Performance of Building Directive
Adopted 09/2023, into force 10/10/23	Adopted 10/2023, into force 20/11/23	Adoption upcoming (Q1 2024)
11.7% reduction of energy consumption by 2030 (vs 2020) (art. 4)	42.5% target for RES in 2030 (art. 3) Binding target for RES in H&C (art. 23)	Solar Mandate (art. 10), requiring that rooftops above a certain surface be equipped with solar technologies (photovoltaic, solar thermal or PVT) by specific dates as from Dec. 26
National comprehensive assessments for efficient Heating & Cooling (H&C) (art. 25)	Indicative sub-sectoral targets for: <ul style="list-style-type: none">• buildings (art. 15a): 49% RES by 2030• for industry,• and district heating (art., 22a, 24)	Minimum energy performance standards (MEPS)
Mandatory H&C plans for cities above 45,000 inhabitants (art. 25)		Phase out financial incentives for stand-alone fossil boilers by 31/12/2024
Efficient District Heating & Cooling criteria (art. 26) for new or substantially refurbished systems	Streamlined permitting procedures for renewable acceleration areas (art. 15c); and provisions for the installation of solar energy equipment and co-located energy assets (art. 16c)	One-stop-shops for the provision of information to citizens and relevant local actors

EU Emissions Trading System (ETS) 2023 revision including Buildings

Net Zero Industry Act: support EU Clean tech sectors (including Solar Thermal)

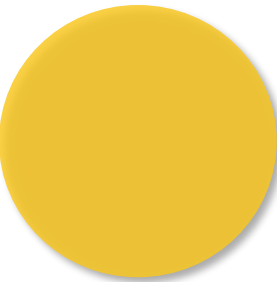


Solar mandate, Energy Performance of Buildings Directive (EPBD)



Article 10 “Solar Energy in buildings”: Optimising buildings’ use and their capacity to generate energy from the sun

Member States shall ensure that all new buildings are designed to optimise their solar energy generation potential on the basis of the solar irradiance of the site, enabling the subsequent cost-effective installation of solar technologies.



* in case of major renovation, action requiring a permit, works on the roof, or installation of a technical building system (i.e. heating system)

Ensuring a successful implementation of Article 10 in EPBD for « Solar energy in buildings »

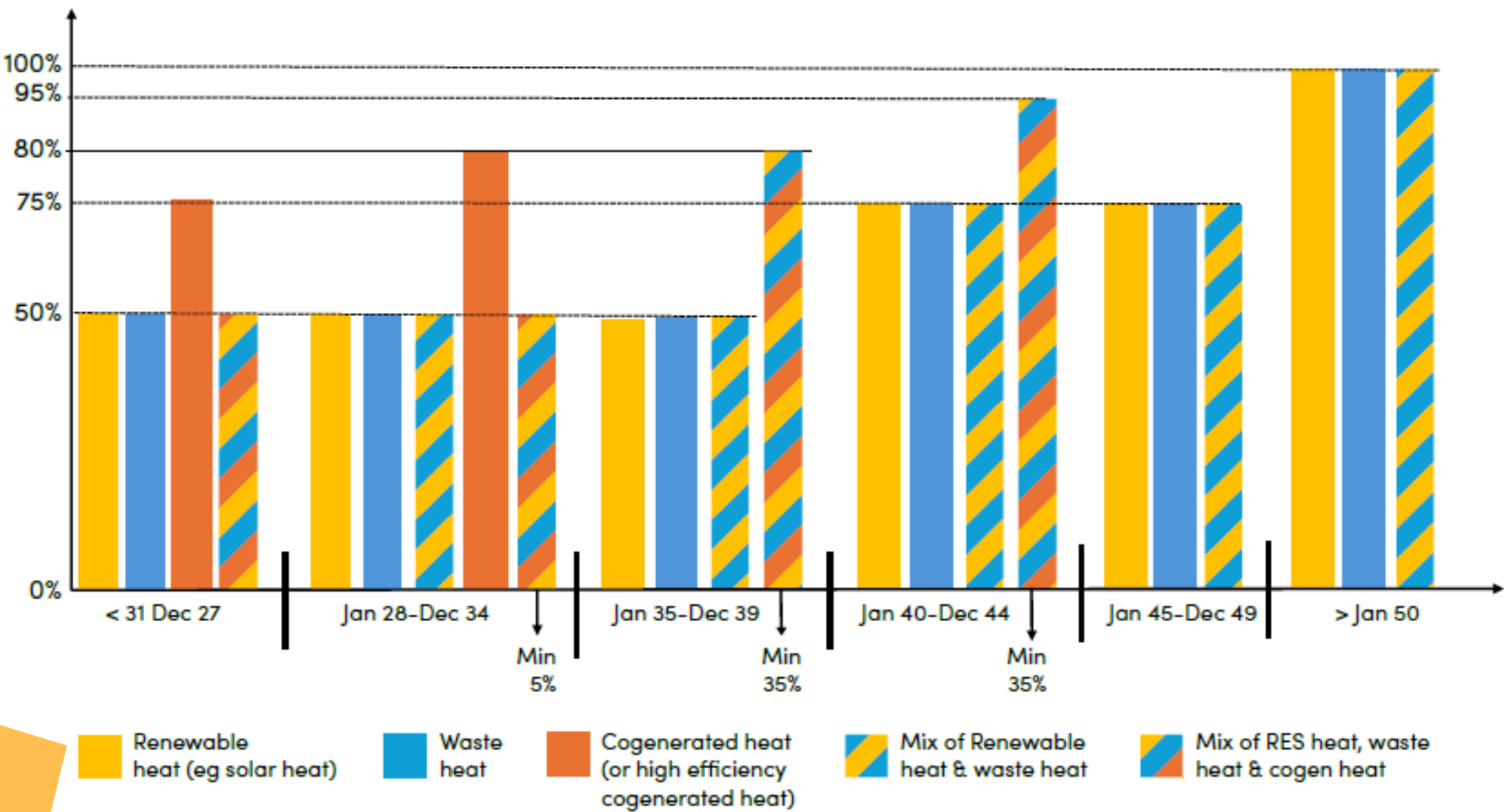
Guidance from the solar heat sector to Member States for their transposition in national law

May 2025

SHE’s guidance released on 27 May 2025, to support Member States in the implementation Available [on line](#)

Large Scale markets: District heating & Industry

The path towards “efficient district heating”, as per the requirements of the 2023 Energy Efficiency Directive



By specific deadlines, district heating networks will need to comply with any of the above options i.e. containing an increasing minimum share of RES heat (or others), reaching 100% in 2050

Collaboration with the World Business Council for Sustainable Development, Technology brief for SHIP, Dec 2025



[Renewable-industrial-heat-navigator-brief Solar-thermal-solutions.pdf](#)

New EU Commission strategic priorities (announced Feb 25)

of direct relevance to Solar Thermal

CLEAN INDUSTRIAL DEAL:

EU Clean Tech
+
EU industry's
Competitiveness

AFFORDABLE ENERGY
ACTION PLAN

AFFORDABLE
HOUSING
PLAN

HEATING AND
COOLING
STRATEGY



Solar thermal industrial actors call for clear political support for their “no-regret” technologies across regions

Brussels, Brazilia, Mexico City, Pune - 24 June 2025: Coinciding with the release of the IEA Solar Heating and Cooling (IEA SHC) global market report for solar heat market sales in 23/24, various industry associations across the world unite to call for clear political support and greater uptake of solar thermal technologies.

⇒ Joint industry release today by
Europe, Brazil, Mexico, India
Towards more political support for Solar
thermal technologies worldwide

Thank you !

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