

The development of the ground source heat pump market in the UK

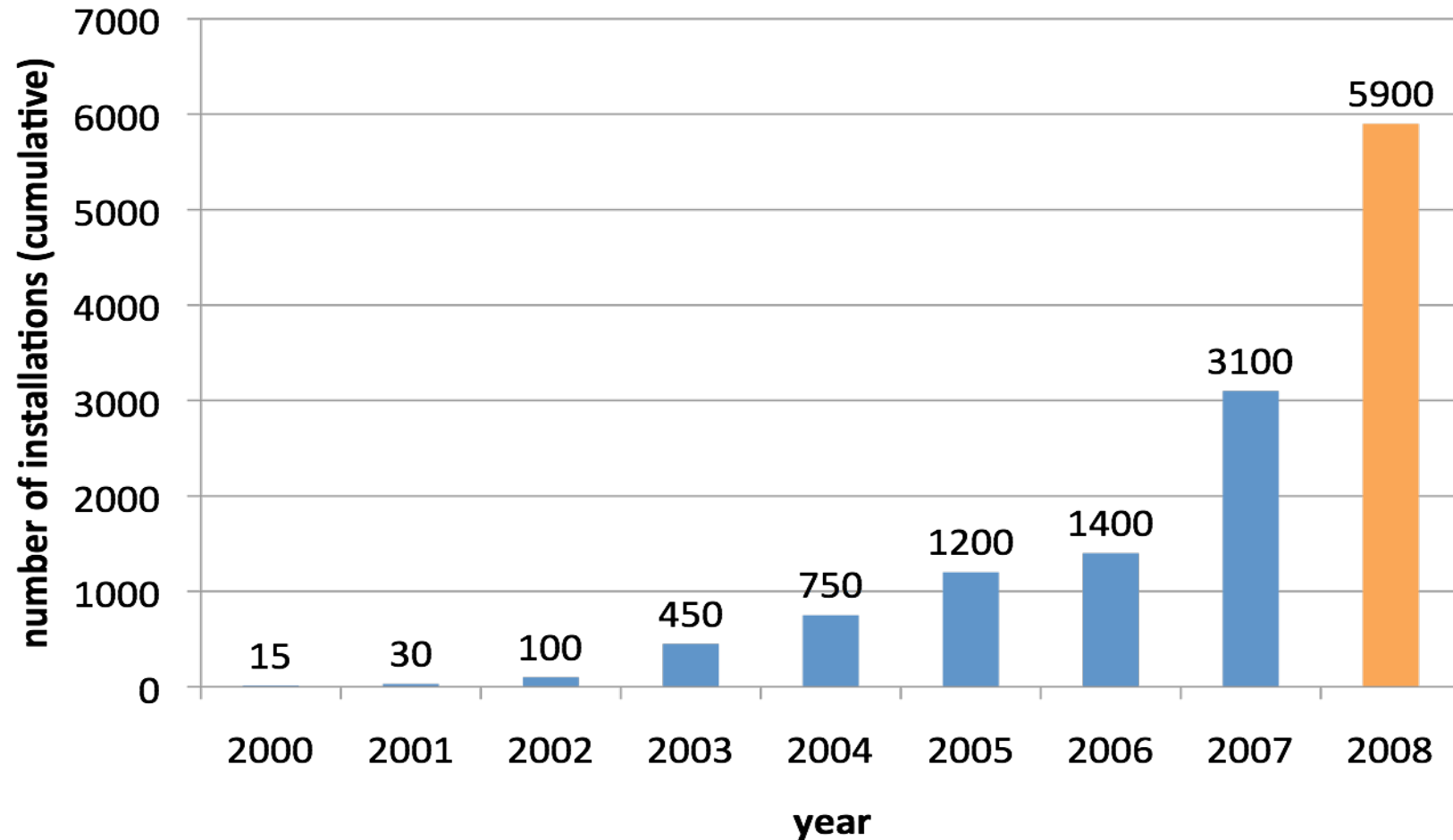
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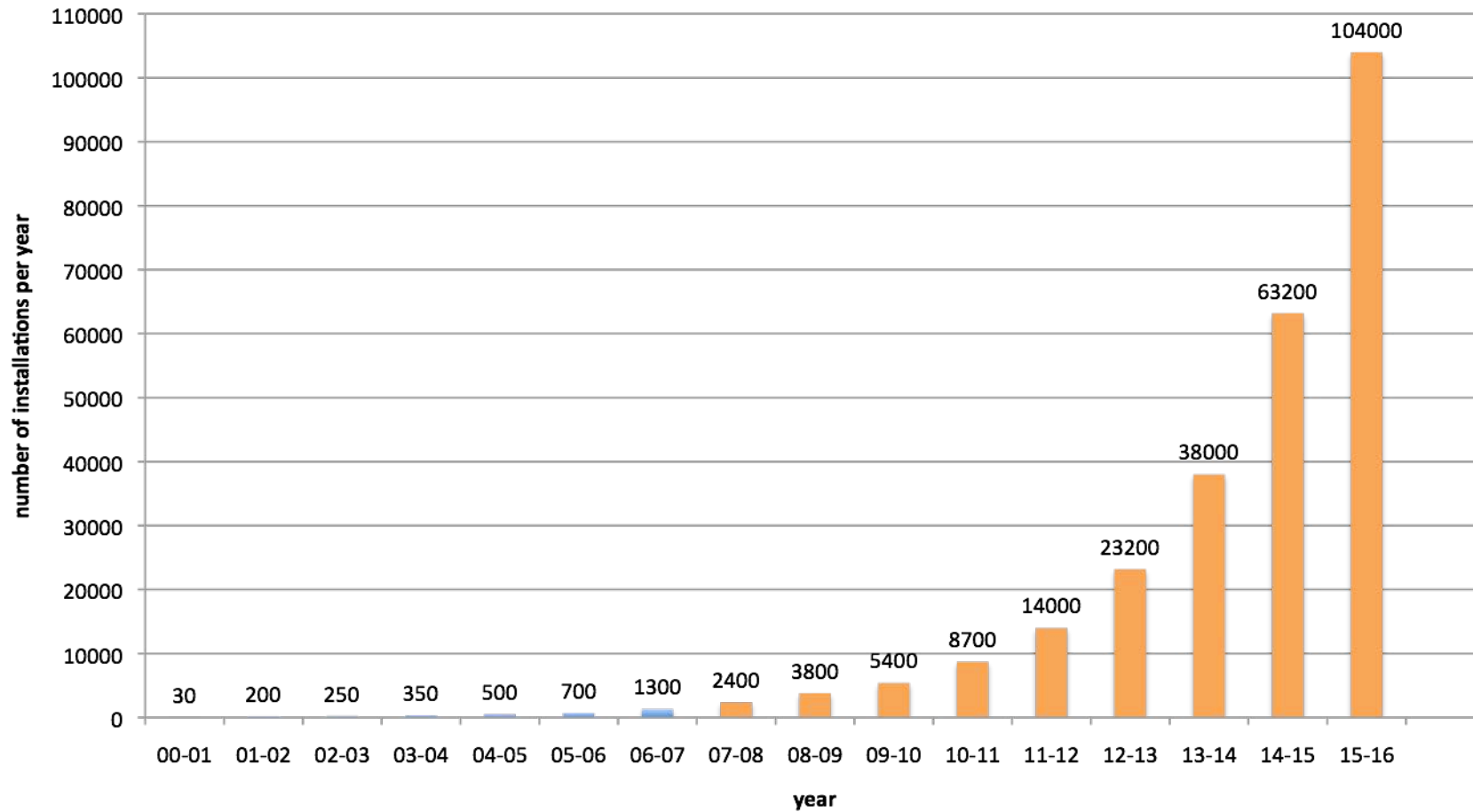
UK: GSHP current installations

- **market still in infancy**
- **no precise figures readily available**
- **80% of current market residential**
- **85% of all UK HP installations GSHPs**
- **market growing since 2001 by average of 60-70% per year**

Total GSHP installations UK past and present



Actual / projected GSHP installations (business-as-usual)



UK: GSHP market segments

- **on and off gas grid**
- **new build and retrofit**

UK: heating mix

Gas central heating	84.2%
Oil central heating	7.0%
Electric Storage	5.5%
Gas non-central heating	1.3%
Electric non-central heating	1.1%
Solid central heating	0.72%
Solid non-central heating	0.14%

UK: domestic energy prices

	p/kWh
gas	3
electricity	10
heating oil	3.8
wood chips	1
wood pellets	3-4
coal	2-4
LPG and propane	4.5-8

UK: GSHP industry

- **wide range of HP units available**
- **some manufacture of HP units**
- **small specialised installation companies with large geographical coverage**

UK: policy and regulatory context

- **subsidy schemes**
- **prominence in energy scenarios, targets, general discussion**
- **rationalisation of certification**
- **energy company obligations (CERT)**
- **link to fuel poverty agenda**

UK: (some) challenges for GSHP industry

- **building installer industry**
- **installer and specifier training**
- **cost structure and financing**
- **consumer confidence**