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# Market surveillance Space and combination heaters



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# Objectives of the presentation

- Introduce the role of the heating sector in the Ecodesign and energy labelling framework
- Identify quick and easy market surveillance checks
- Identify technology areas worth specific focus

# EHI represents

... **39 European market leaders** for thermal comfort solutions

... **13 industrial heating associations**

## ... the European Market:

90% heating & hot water  
90% controls & heat emitters  
80% biomass central heating  
75% hydronic heat pumps  
70% solar thermal

## ... the full Portfolio:

All Technologies and  
all Elements of a  
Heating system for  
domestic and commercial use

... **20 billion euro** annual sales

... **120 000** Employees

... **500 million euro / year**

Investment  
in energy efficiency

# European heating at a glance

## Energy consumption in EU

**40%** spent in  
buildings

**85%** spent for  
heating and  
hot water



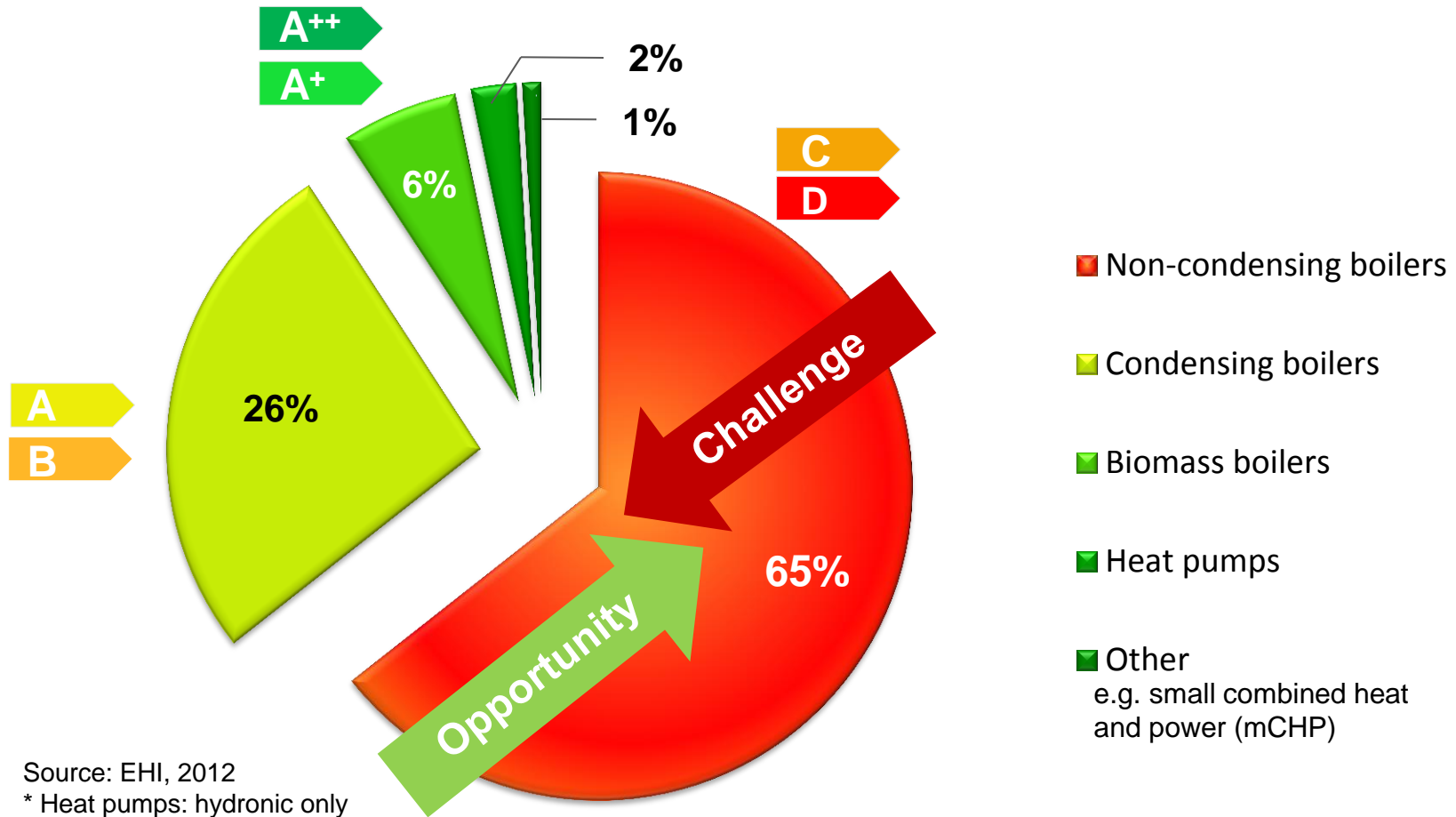
## Heating appliances installed in EU

**120 mil** central  
space heaters

**90%** European  
heat market



# Efficiency of installed stock



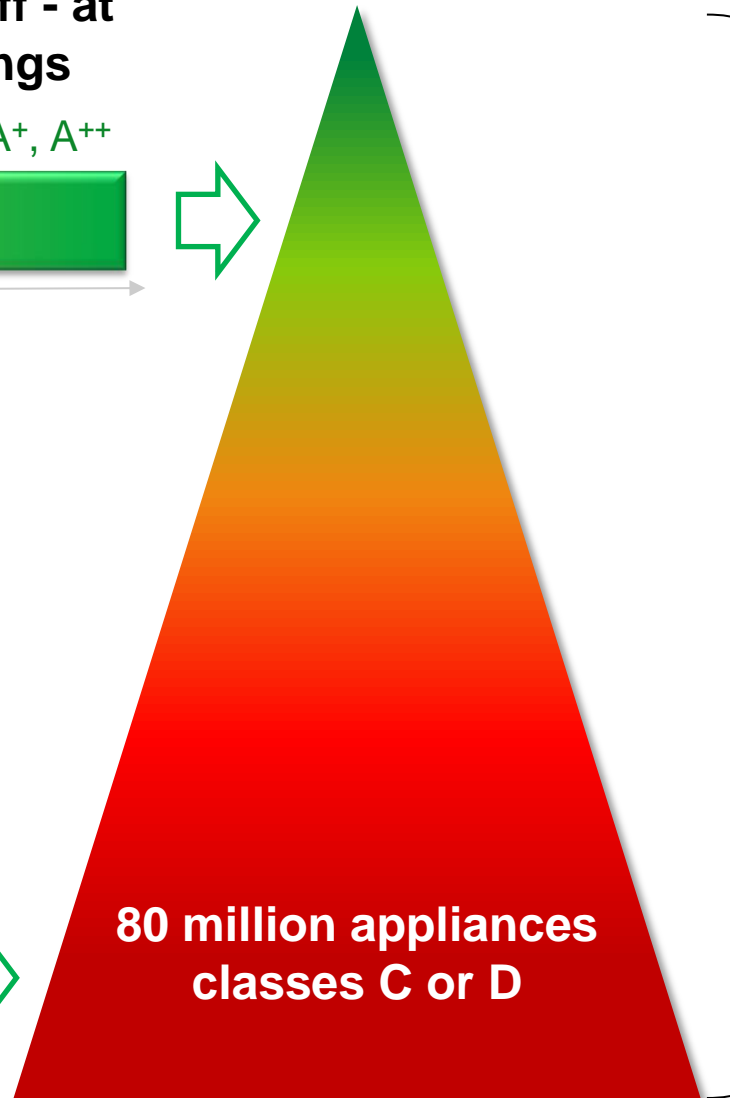
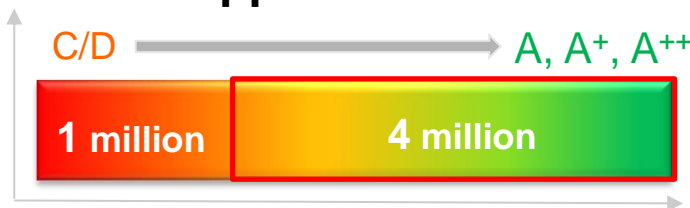
**120 million installed space heaters in Europe -  
 65% in energy label class C or D, i.e. non-condensing oil or gas boilers**

# Impact of Ecodesign on heating consumption

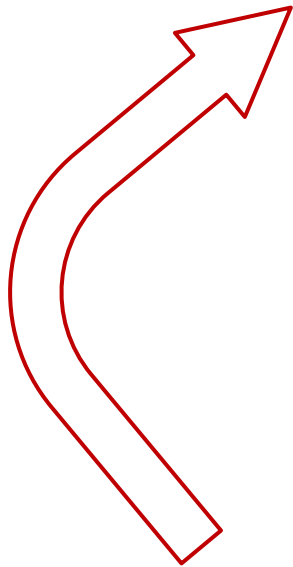
**New appliances 2016 ff - at least 20% energy savings**



**New appliances 2014**



~ 280  
Mtoe  
year



# Quick checks 1: Appliances

- *Correct labelling scope:* heaters with rated heat output  $\leq 70$  kW and storage  $\leq 500$  l.
- *Use of required label design:* differences between 2015 and 2019 label for heaters.
- *Off-peak symbol:* only in lot 2 Electric Storage Water Heaters or Heat pump water heaters, not combination heaters (Lot 1 ).
- *Efficiency physical limits:* products corresponding to specific technologies have limits in their maximum achievable seasonal efficiency – technical documentation specifies it.
- *High efficiency pumps:* (Lot 11) circulator pumps integrated in appliances need efficiency index (EEI)  $\leq 0,23$  (part of product documentation)
- *High temperature vs. low temperature heat pumps:* each of the two technologies has specific efficiency values, no confusion (LT has higher efficiency); only HT heat pumps can use package labels.

## Quick checks 2: Packages

- *Label for package and for products:* products with integrated components (e.g. boilers with integrated control) to be labelled as a products (if in Regulation 813 scope) and in addition as a package.
- *All appliances must respect Ecodesign:* the efficiency of appliances not achieving the Ecodesign efficiency limits cannot be boosted by additional components (e.g. controls) above the limits.
- *A way forward:* Cooperation with national installer associations, in particular when it comes to the package label. A verification of the package label calculation tool, which will be available in the market, be helpful.



# Technology focus 1

- Conventional gas boilers, types B and C
  - *Risks:* existing technology, demand is ‘used’ to it. Great potential to undermine efficiency goal of the policy.
  - *Focus area type B boilers:* ensure that they are only sold exceptionally, where they replace existing class B boilers connected to collective chimneys. In particular the specific category of non-condensing forced flue boilers cannot be put on the market.
  - *Focus area type C boilers:* the vast majority of these boilers will not meet the minimum requirements to be put on the market. However, the demand may still be high, as this boiler type is the most common in several EU countries.

## Technology focus 2

- Heat pumps space heaters and combination heaters
  - *Risks:* Growing technology, high commercial interest: need to ensure that technology uptake is not polluted by lower efficiency products.
  - *Focus area 1:* compliance with specific ErP requirements (efficiency, noise) based on parameters (i.e. SCOP) that do not need control or checks by notified bodies.
  - *Focus area 2:* respect of products standards, some of them less known.



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Boilers and Burners  
Association

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**Thank you for your attention**

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