

**Delta Energy & Environment – News from some recent research and market analysis**  
June 2011

**1. Delta's heat pump market research identifies key trends in technology, policy & markets across Europe.**

- ▶ **Smart Heat Pumps: Enablers of a low carbon future?** In this Delta Whitepaper, we look at three case-studies from Germany, Denmark and Switzerland, where heat pumps are already being used as part of a solution to deal with new challenges of intermittency and grid congestion. [Download the white paper](#)
- ▶ **All eyes on the UK heat pump market: The next big growth market in Europe?** The UK is currently a market poised for development, waiting for the domestic RHI incentive to be realised. In May, Delta presented an outlook for the UK HP market at the All Energy Exhibition, Aberdeen, addressing how the UK can achieve its potential, identifying 4 'cornerstones' for long-term and sustainable market growth. [Download the presentation](#)

For more information on Delta's Heat Pump research, including the *ASHP Innovation Monitor Service*, please contact [Lindsay.Sugden@delta-ee.com](mailto:Lindsay.Sugden@delta-ee.com) (+44 131 625 1006) or [Jennifer.Arran@delta-ee.com](mailto:Jennifer.Arran@delta-ee.com) (+44 131 625 1009).

**2. Mass Market Energy Services: Strategies for Success.** New research by Delta explores how energy suppliers and others can capture value in European mass markets for energy services. For further details, visit [http://www.delta-ee.com/studies\\_and\\_services\\_mass\\_market.asp](http://www.delta-ee.com/studies_and_services_mass_market.asp).

**"Delta's multi-client study is of immediate value to us.** The study was tailored to our needs, the findings highly relevant and the presentation itself has given us the tool we were looking for to support development of our strategy & tactics in energy services. Compared to other consultancies, Delta's in-depth knowledge and understanding of the workings of utilities has definitely proven its worth."

**Morten Sejr Olsen, Head of Business Innovation, DONG Energy**

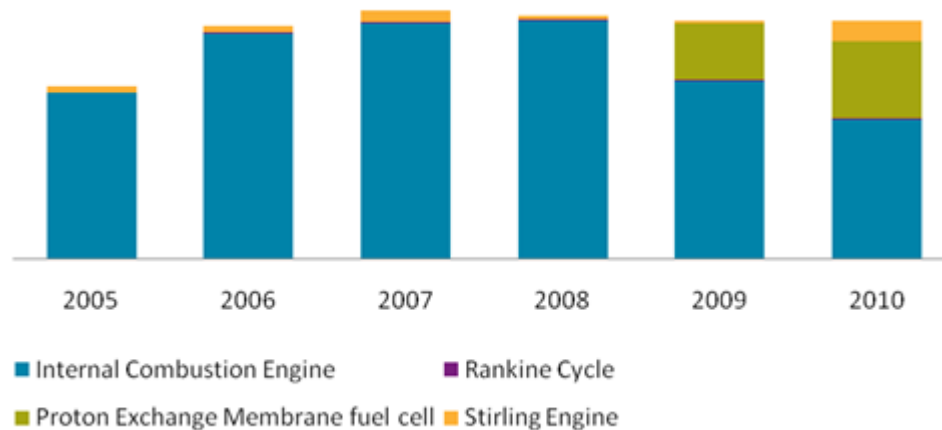
Delta has published a [series of three White Papers](#), highlighting key findings from the Study:

- ▶ **€8 Billion Profit Available in European Energy Services Mass Markets.** [Download the white paper](#)
- ▶ **Energy Suppliers can Treble Their Share of the Energy Services Mass Market.** [Download the white paper](#)
- ▶ **Strategies and Tactics for Success in Energy Services Mass Markets.** [Download the white paper](#)

**3. Delta's unique series of annual Summits were held on 6-8 June in Copenhagen. Attended by European utilities, manufacturers and policymakers, participant feedback was as high as ever:**

- ▶ **2<sup>nd</sup> Annual 'Energy Services in Europe' Summit**  
"Most insightful seminar on energy services in Europe"  
"Best value in terms of insights and network"  
"Very useful contacts made and new insights gained"
- ▶ **6<sup>th</sup> Annual 'Micro-CHP in Europe' Summit**  
"The place to be if you want to compare notes with the micro-CHP market players"  
"As previous events, many thought provoking comments"  
"Powering the Future!"

4. **Delta Micro-CHP Annual Market Roundup – we identify some significant growth in market value while sales reach their historic peak. But only just.** This was the message given to delegates at Delta's 6<sup>th</sup> Annual *Micro-CHP in Europe* Summit, attended by the industry's major players. While 2010 saw global annual sales of micro-CHP reach the highest to date (although by only several hundred) with over 23,000 sold around the world, the market value increased more than 25% from €269 million to €366 million. At the same time, annual global installed capacity shrunk from 38.2 MWe to 33.4 MWe (see graph below).



Full analysis on the reasons for this and other trends over the last 12 months in the global micro-CHP market (and an outlook on the next 12 months and beyond) is available to Micro-CHP Service subscribers. For information on how to become a subscriber, please contact Scott Dwyer [scott.dwyer@delta-ee.com](mailto:scott.dwyer@delta-ee.com) or call +44 131 625 3213

5. **Mini and micro-CHP in Europe - Delta market projections - annual sales can reach 600,000 by 2020.** This short Delta Research Brief summarises our analysis of how the European markets for these 0-100 kWe products are likely to develop by 2020, and the key drivers that will underpin this growth. [Download the white paper](#)
6. **A new Delta study commissioned by GE Energy reveals that the benefits from EU supply-side efficiency measures are comparable to demand-side measures.** The report quantified the primary energy and CO<sub>2</sub> savings benefits of the following measures:
- ▶ CHP
  - ▶ Smart grid
  - ▶ Waste heat recovery
  - ▶ Fuel switching
  - ▶ Power plant efficiency

The report can be downloaded in full from the Delta website. [Download the full report](#)

7. **Delta's expertise in Electric Vehicle recharging infrastructure.** Delta has recently completed two separate studies into the EV charging infrastructure space:
- a. **EV Infrastructure Costs and Supply Chain Analysis.** Delta was commissioned by the UK Energy Technologies Institute (ETI) to provide an analysis of the capacity of the supply chain for the deployment of recharging infrastructure in the UK. This focused on key component costs out to 2050, taking into account the key drivers that will impact the future cost evolution of charging infrastructure.
  - b. **DC Fast Charging Infrastructure Review.** Delta undertook a study for a leading European energy company to analyse the DC fast charging infrastructure market – enabling the client to become an informed buyer of chargers in the short and medium term.

Delta has published an article on EV charging infrastructure technologies and market issues in the May 2011 issue of *Energy World*, published by the Energy Institute. [Download the article](#)

8. **New research available on the Delta website**

- ▶ Micro-CHP offers carbon savings over gas boilers in the UK until 2030 – a Delta white paper evaluating the extent to which Stirling engine and fuel cell CHP can save carbon, now and into the future. [Download research brief](#)
- ▶ The UK heat pump market could increase 5-fold by 2020 – a Delta white paper analysing the current and future size of the UK heat pump market, and the players driving it. [Download research brief](#)
- ▶ Huge growth potential in the UK home services market – Delta research with Nomura has assessed the value of the UK home services market in 2009 and 2013. [Download research brief](#)
- ▶ How much can heat pumps penetrate the retrofit heating market? – a Delta presentation given at the Ecobuild Conference, London, March 2011 [Download presentation](#)

For more news and downloads from Delta, please visit <http://www.delta-ee.com/>.