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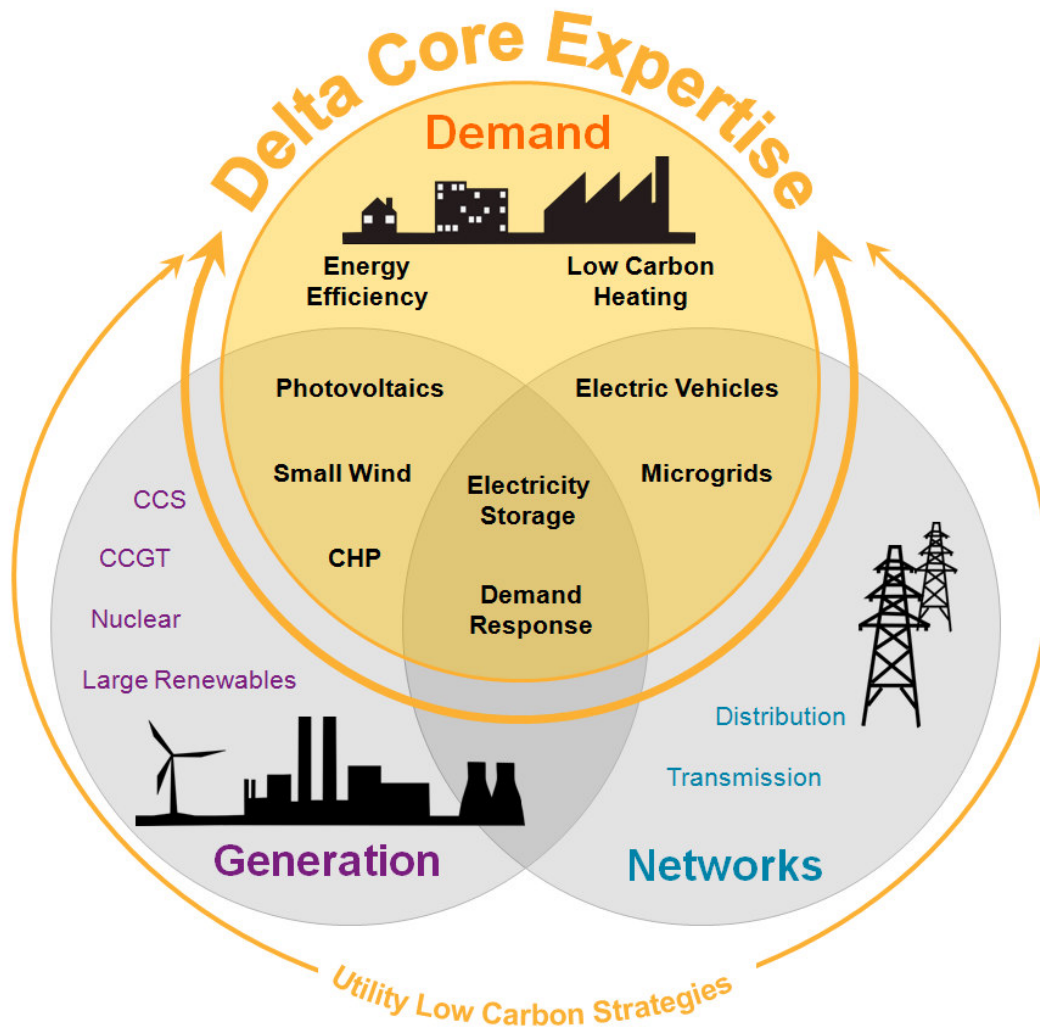
# Heat Pumps in the UK

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18<sup>th</sup> May 2011, All Energy

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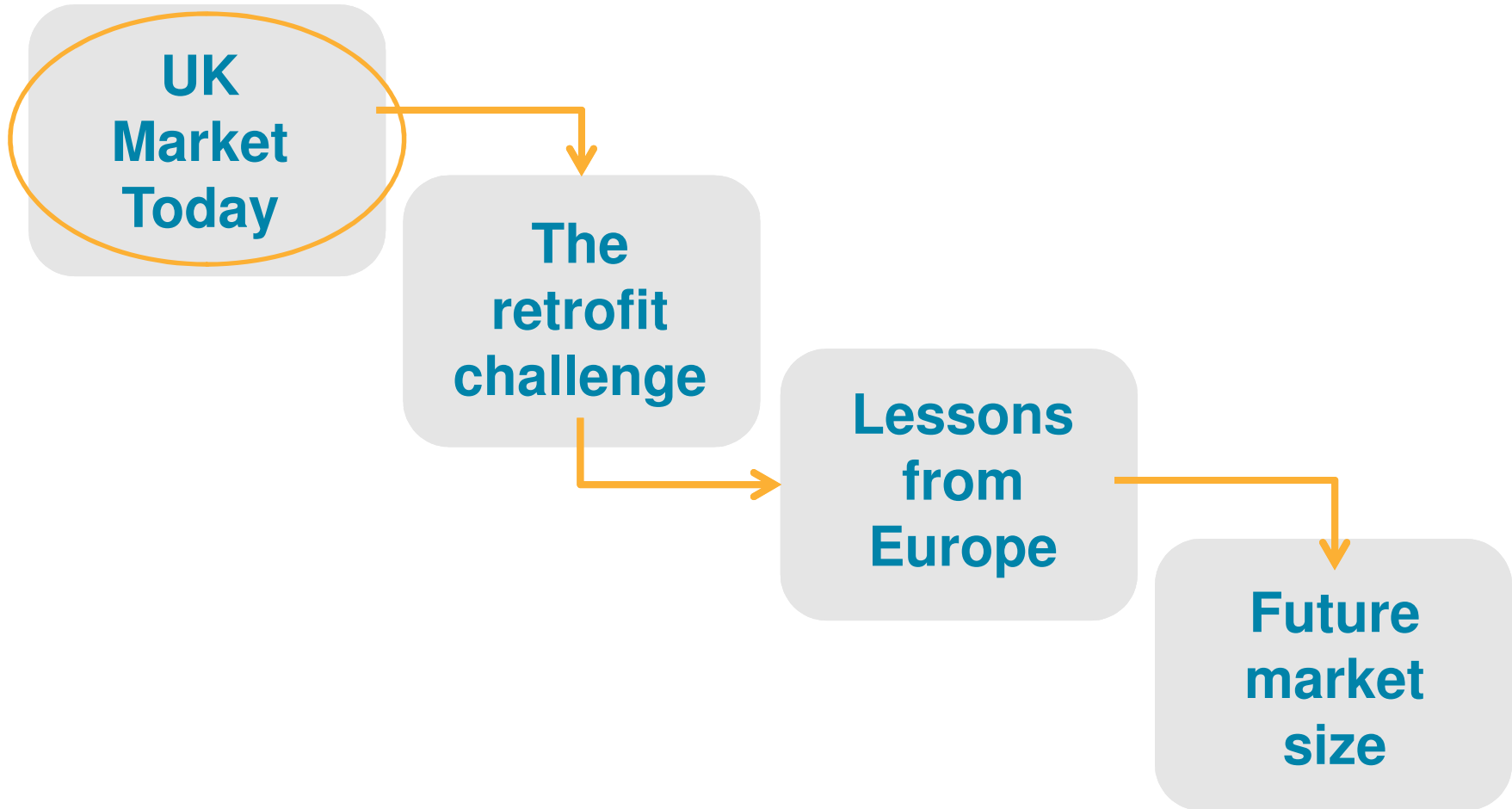


**Market expertise**

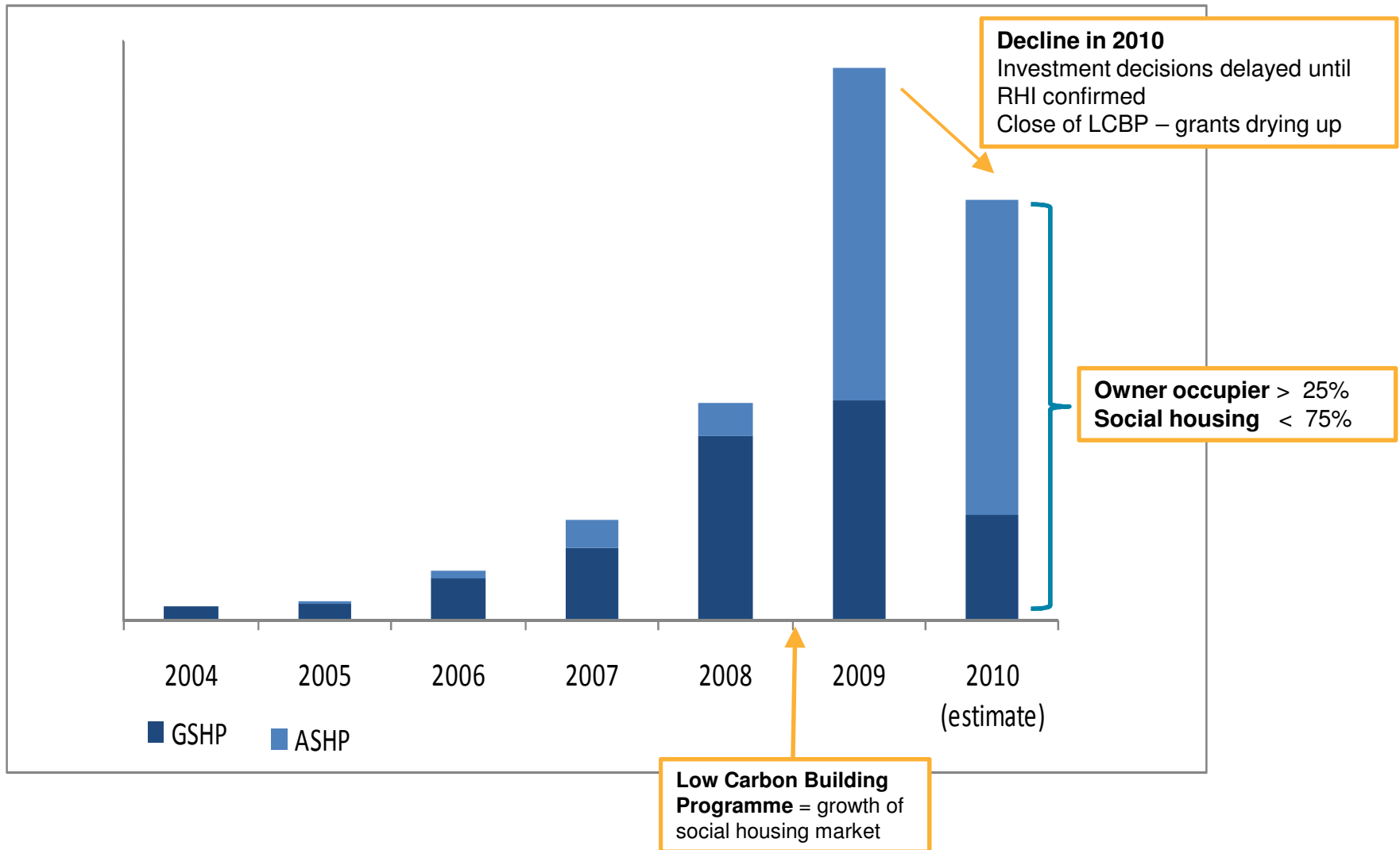
**Strategy & tactics**

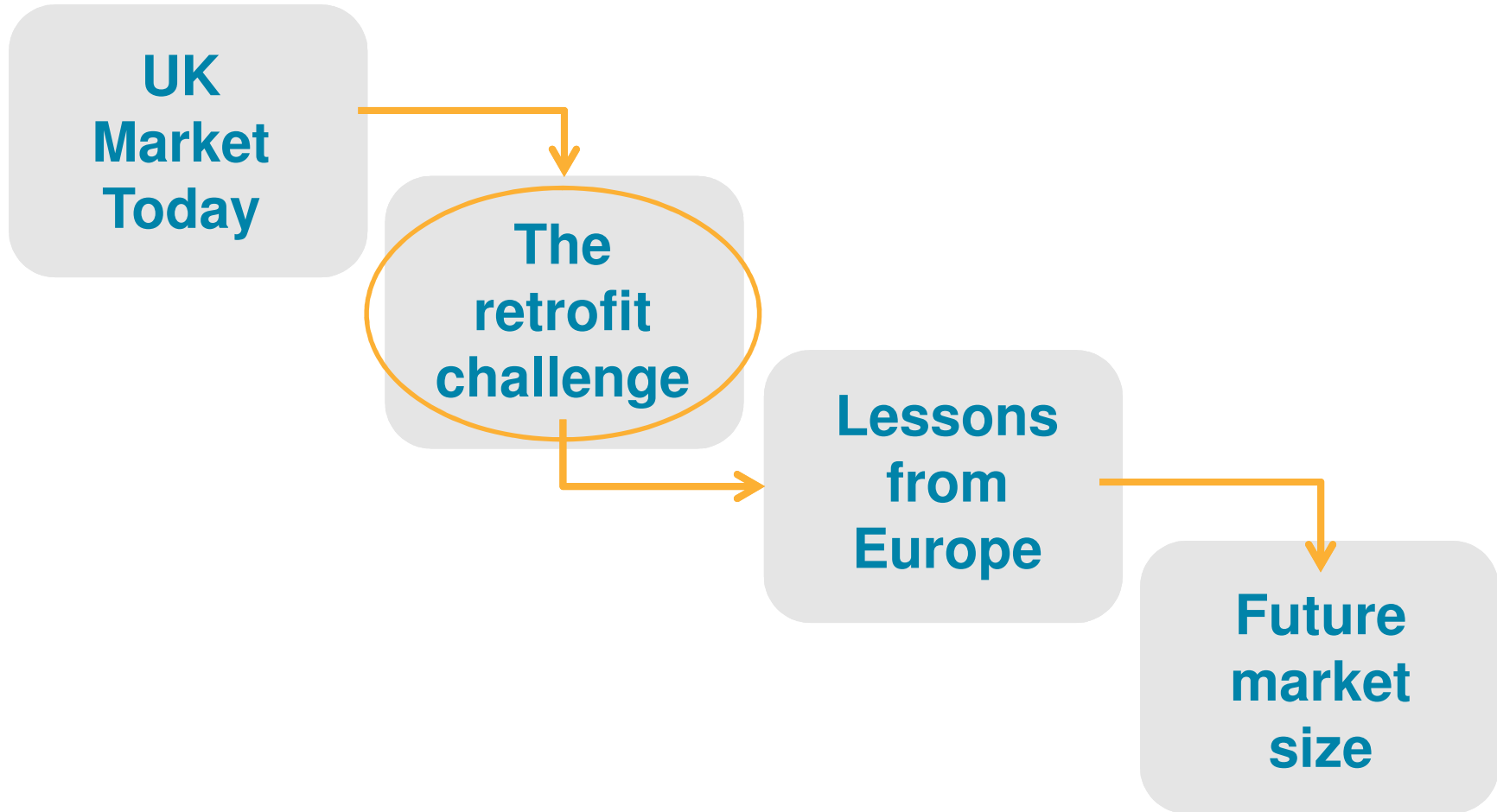
**Clients**

- ▶ **Energy companies**
- ▶ **Manufacturers**
- ▶ Finance sector
- ▶ Policy makers

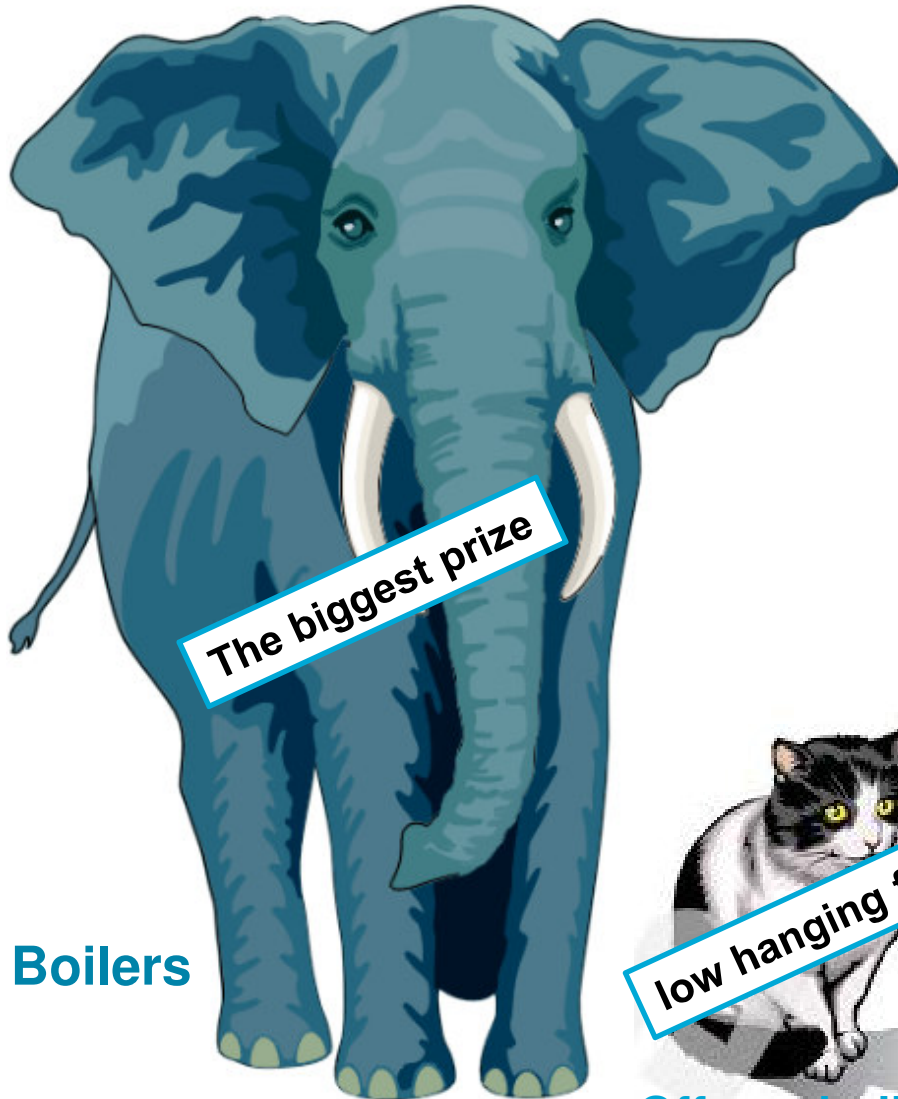


# UK market case study – the emerging market





## The retrofit opportunity: Current UK market



The biggest prize

**Boilers**

### Boilers

- 1.6 million boiler replacements / yr

### Heat Pumps

- 15,000 heat pump installations / yr

### Off-gas boilers

- ~150,000 replacements / yr



low hanging fruit

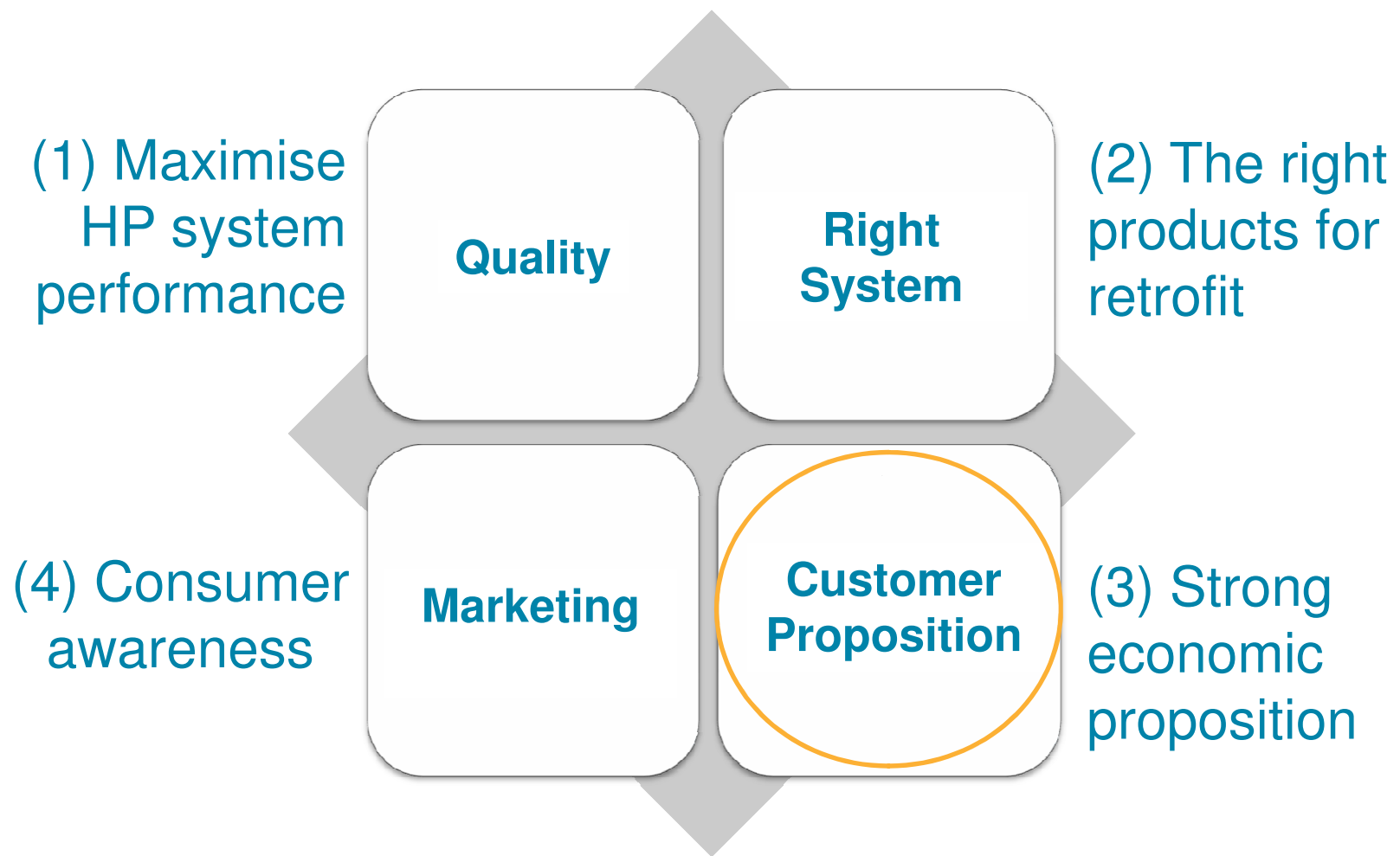
**Off-gas boilers**



**Heat Pumps**

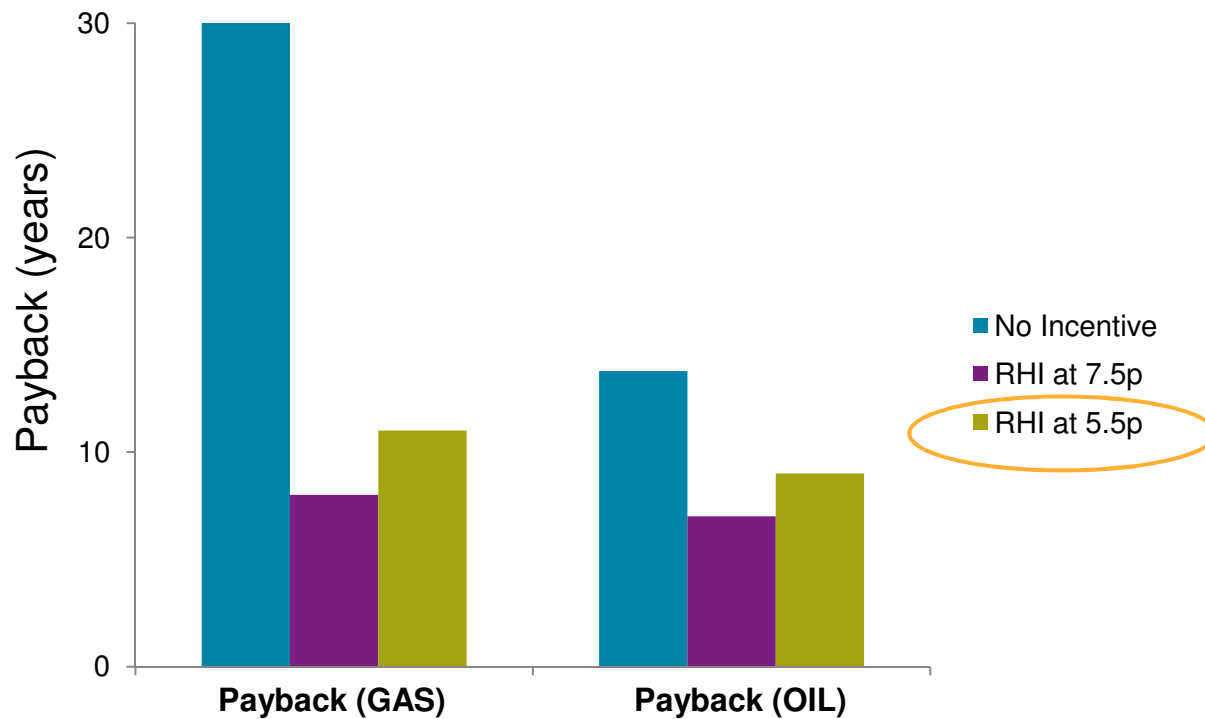


**Retrofit HPs**



## The impact of the RHI: Simple payback for heat pumps vs gas and oil

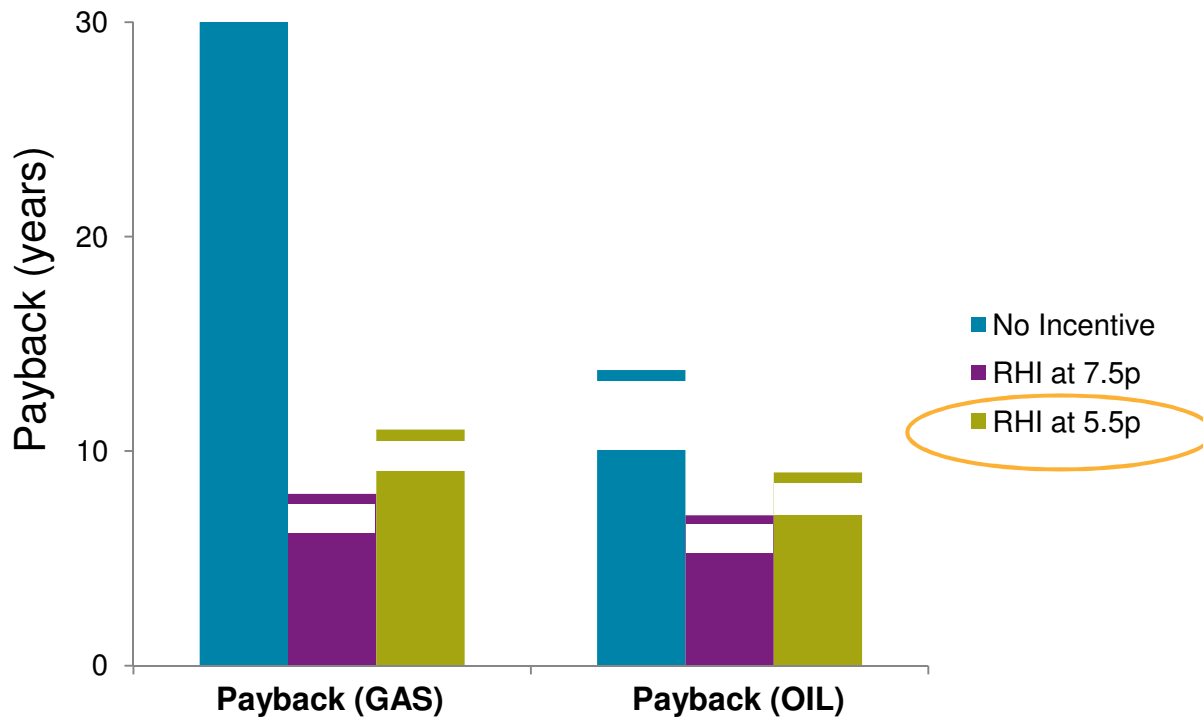
*SPF of 2.5*



## The impact of the RHI: Simple payback for heat pumps vs gas and oil

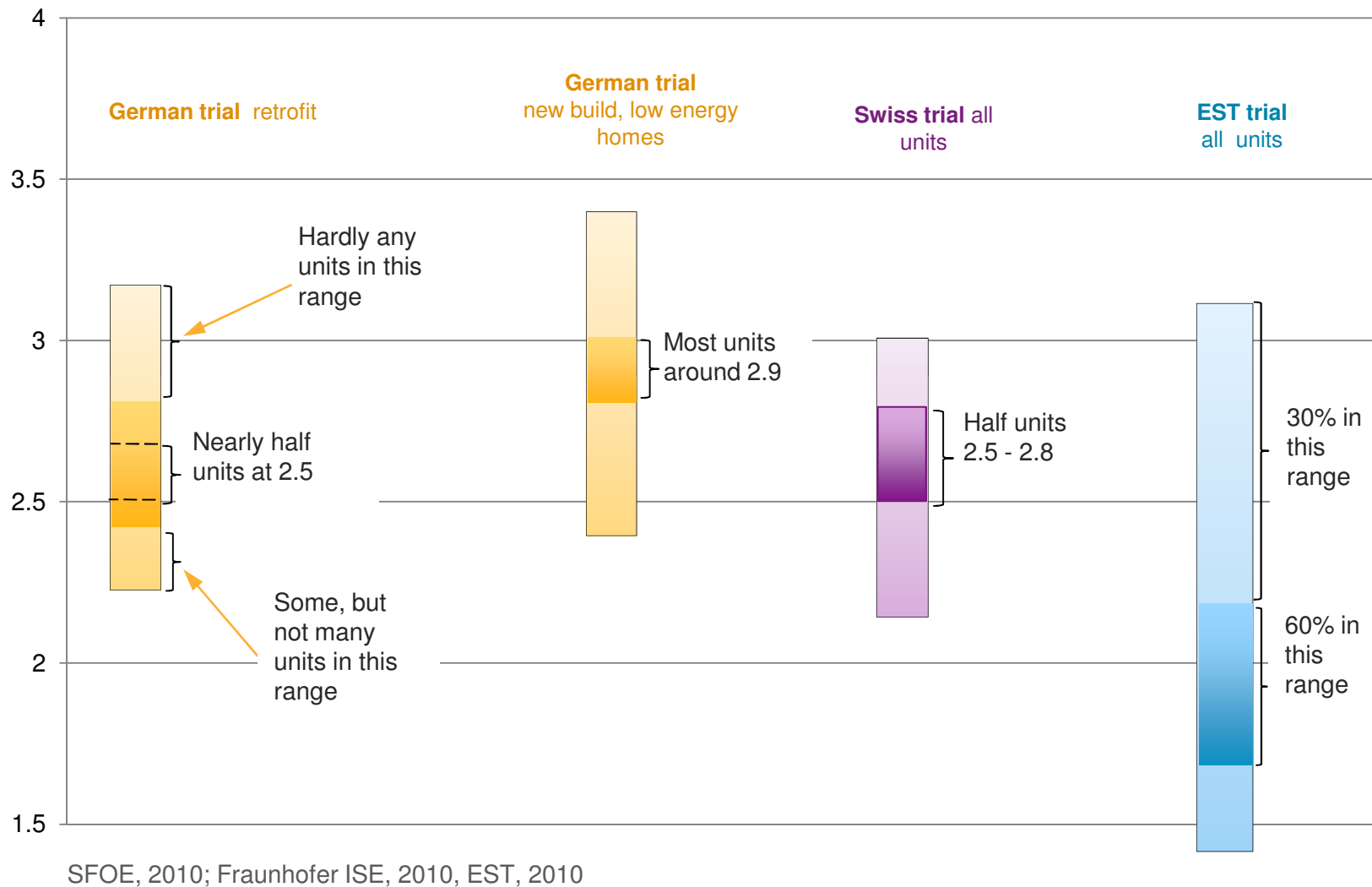
SPF 3.0

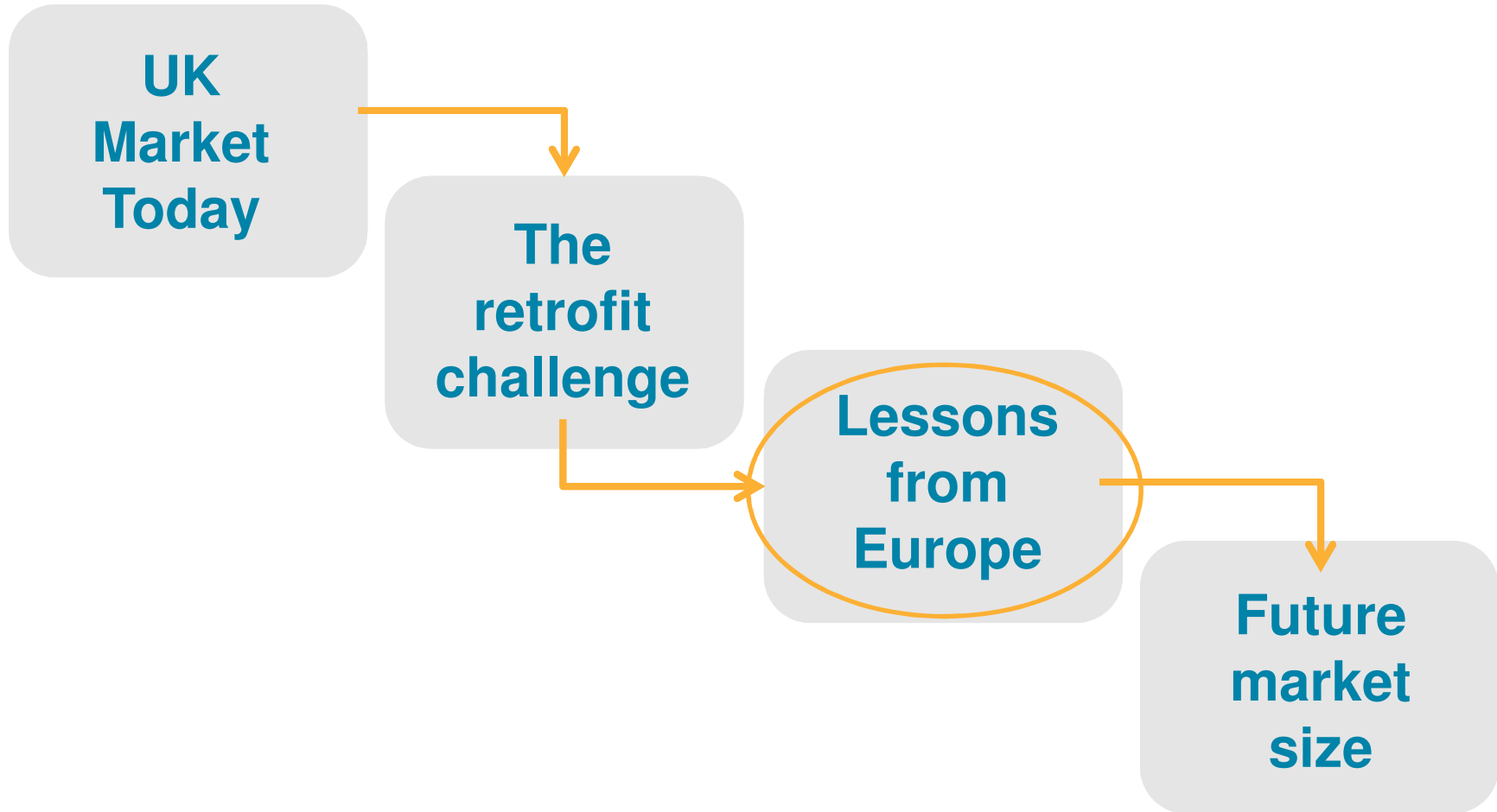
Increasing HP efficiency by 0.5 significantly reduces payback times

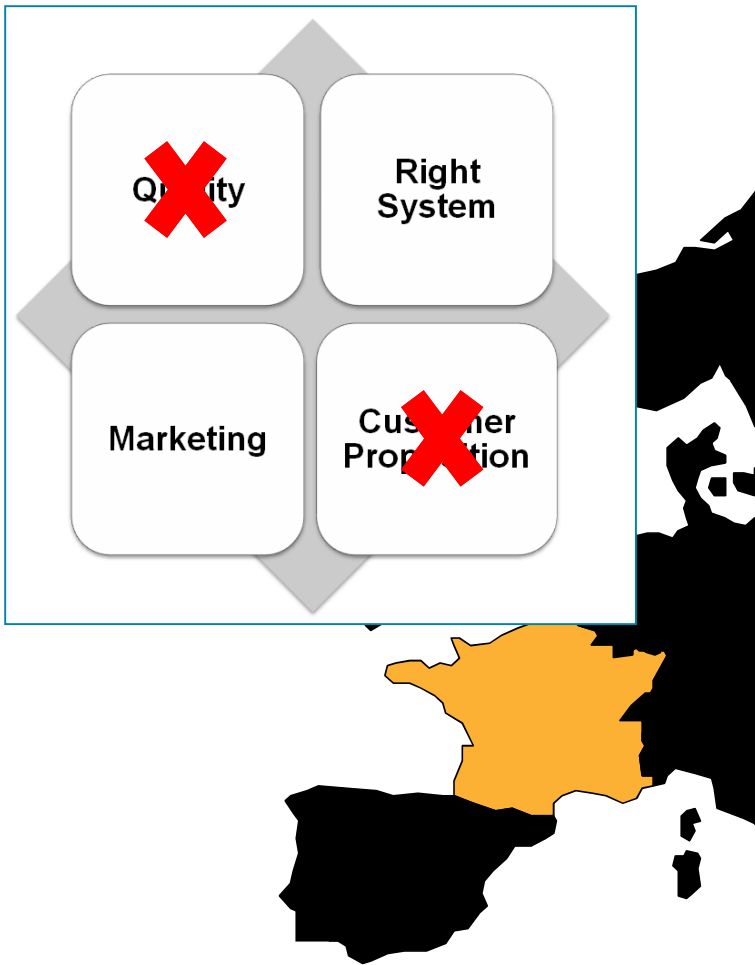


# EST trial results compared to Switzerland & Germany

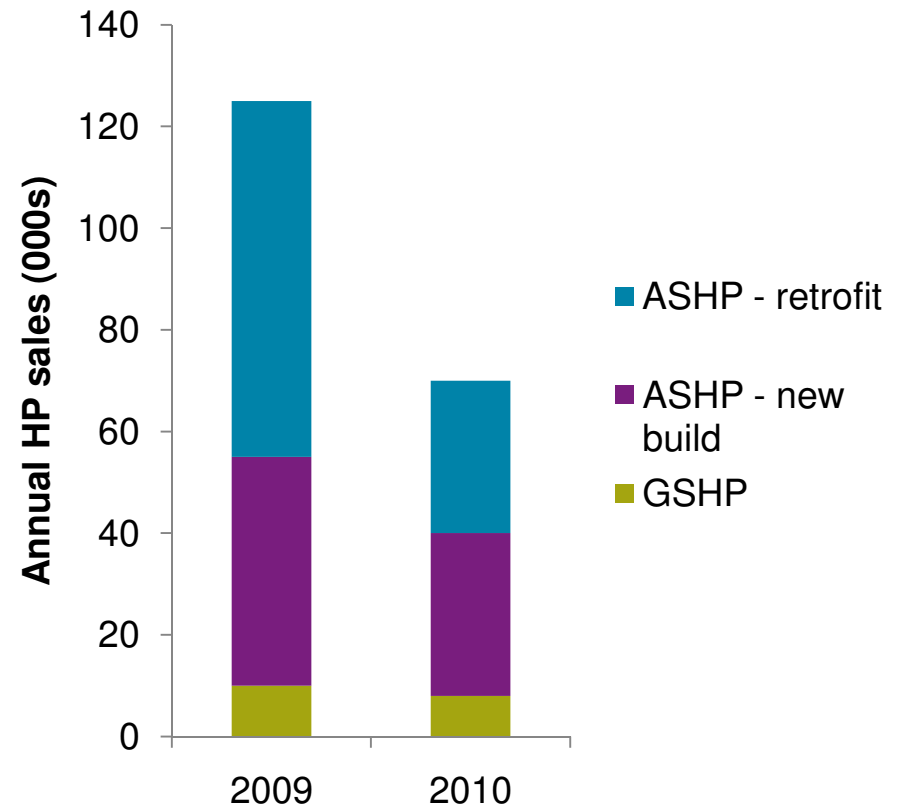
## ASHP

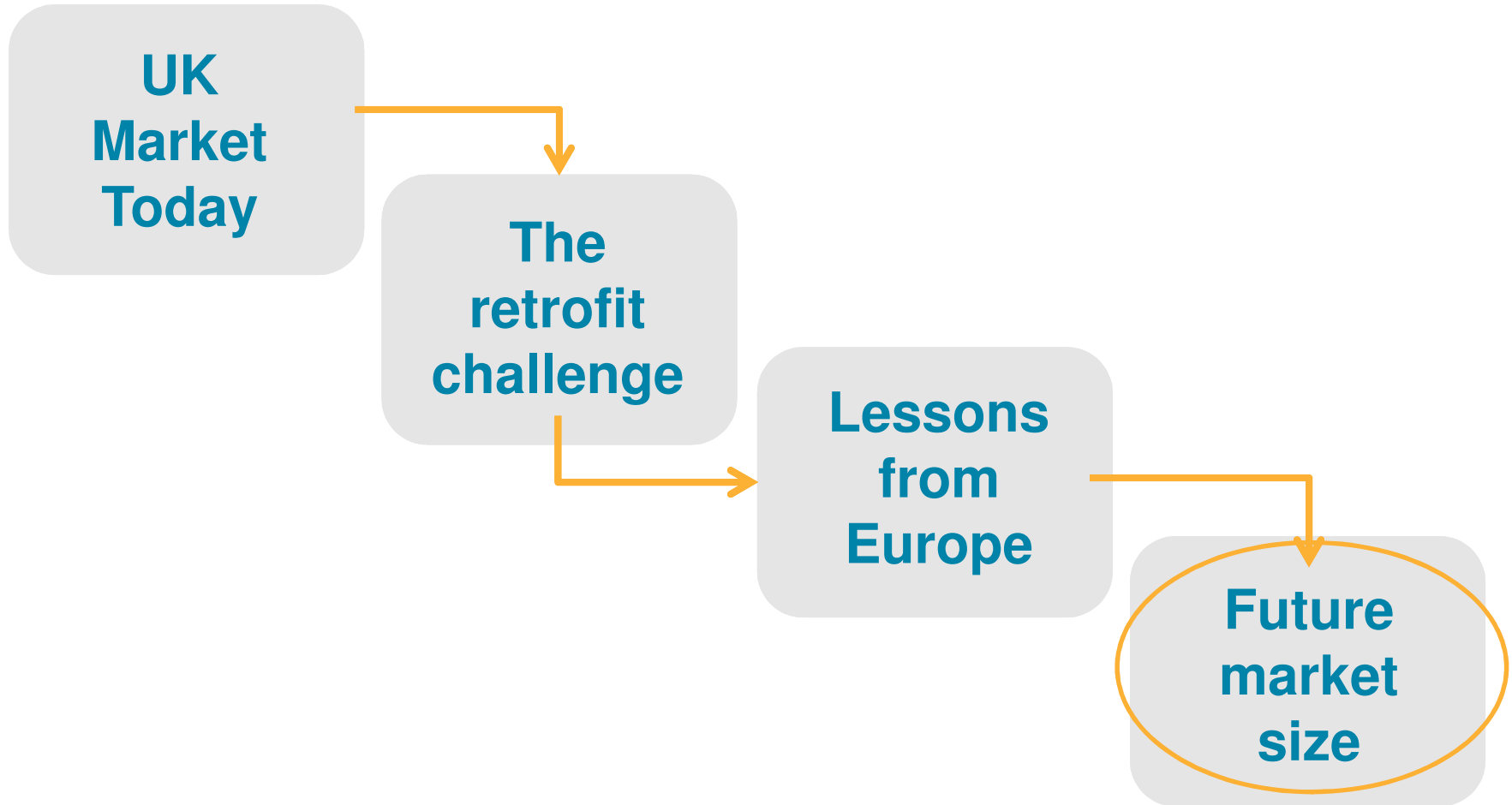




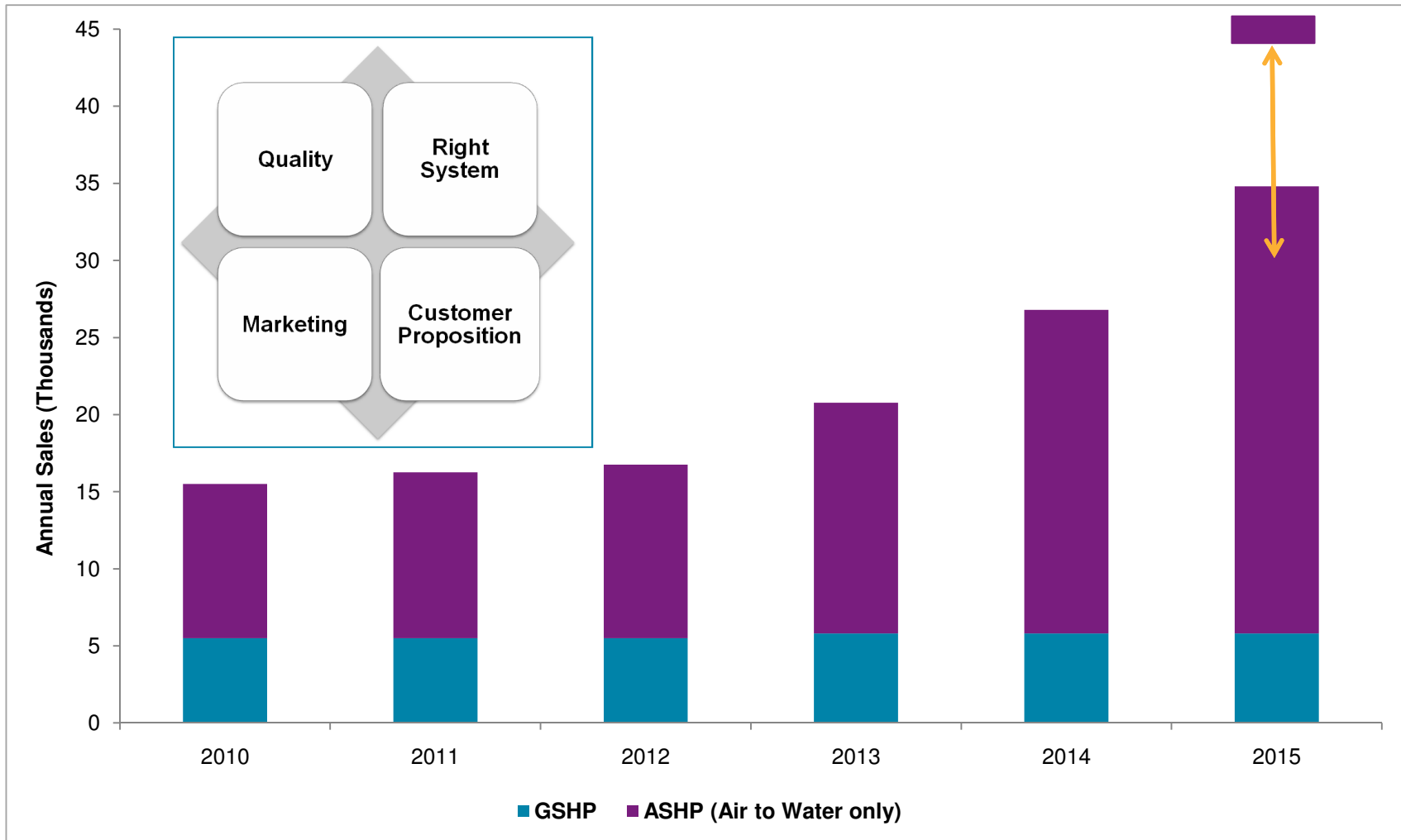


## France: opening up the retrofit market?

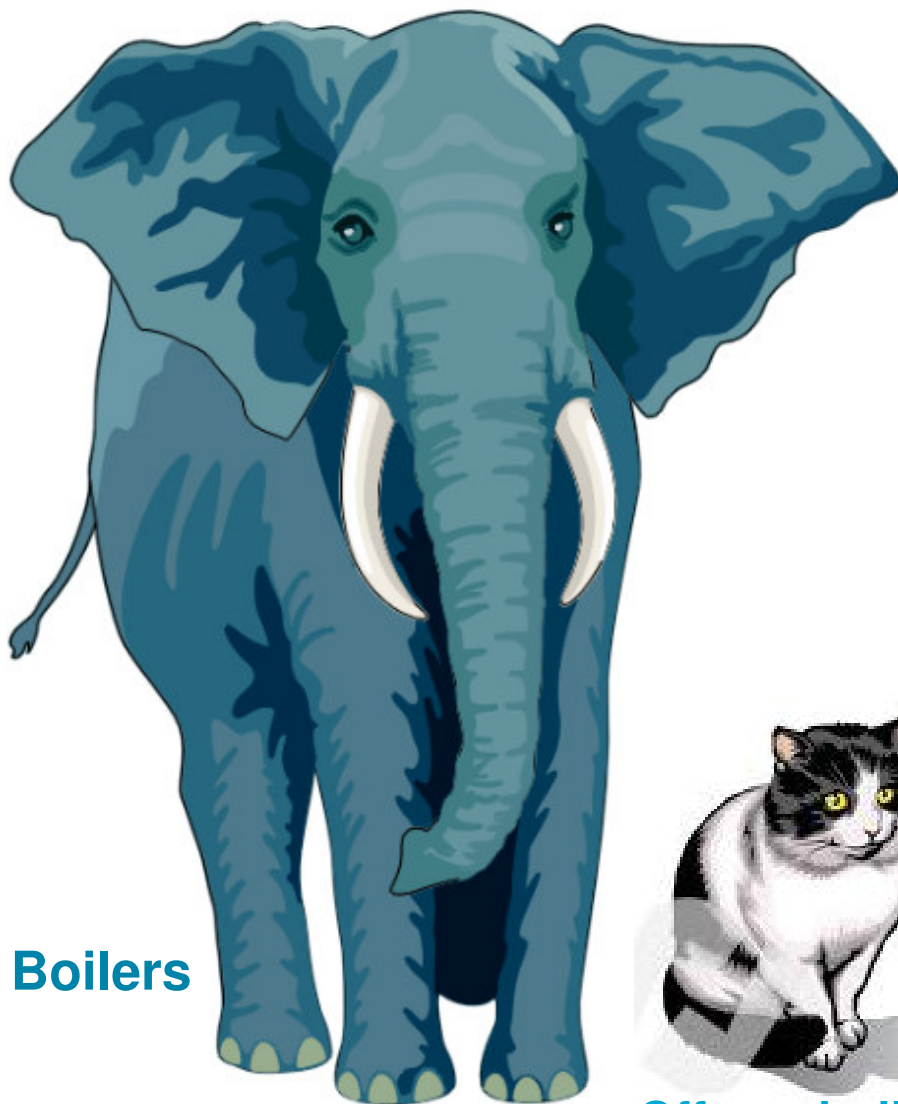




# So where is the UK market heading?



## The retrofit opportunity: Current UK market



**Boilers**



**Off-gas boilers**



**Heat Pumps?**

# Thank You

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