

Delta market projections: European combined Mini & Micro CHP annual sales can reach 600,000 by 2020

Delta analysis of the European opportunity for Mini & Micro CHP markets (<100 kWe) up to 2015 and 2020 suggests that:

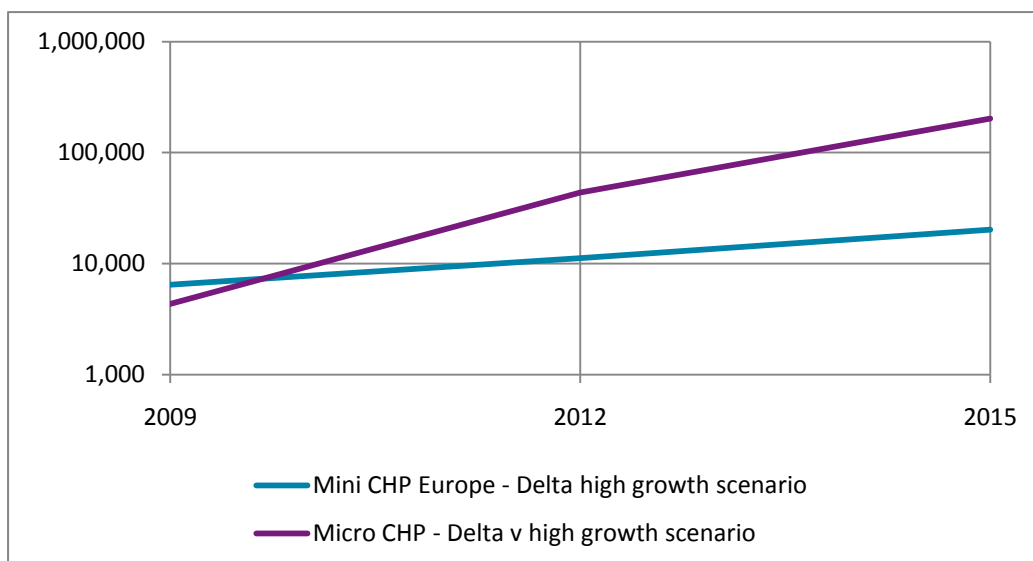
- ▶ **KEY MESSAGE 1:** The European Micro and Mini CHP market could reach over 200,000/year by 2015 and over 600,000/year by 2020.
- ▶ **KEY MESSAGE 2:** Energy market spark spread evolution will be critical to European Mini-CHP market development.

Delta's core offerings in relation to markets for European micro and mini CHP markets include:

- ▶ Detailed product review across the Micro (0-5 kWe) and Mini (5-100 kWe) CHP ranges – what is available, at what price and what products perform best? [Delta also analyses markets in size ranges of 100 kWe and upwards].
- ▶ Analysis of the various barriers and drivers to market growth, in particular: policy, spark spreads, product performance and customer applications & needs.
- ▶ We generate scenario-based forecasts for annual sales across the EU, broken down by major individual markets.

Key Message 1: The European Micro & Mini CHP market could reach over 200,000 / year by 2015 and over 600,000 / year by 2020

We show annual sales in Delta's high growth scenario – logarithmic scale. We see growth markets in several countries, including Germany and 2-3 central / eastern European countries.



Source: Delta Energy and Environment

Key Message 2: Energy market spark spread evolution will be critical to European Mini CHP market development

To generate our market projections, Delta breaks down the European Micro and Mini CHP markets into key barriers and drivers. Our assessment of the Mini CHP market drivers is summarised here. Mini CHP is becoming familiar to some customer groups in a small number of markets, but unknown in many more. We believe that the spark spread trend is a top 3 driver in the period to 2020, and its evolution will be critical to shaping the future market.



Source: Delta Energy and Environment

Delta's deep market knowledge of small-scale CHP in Europe helps our clients in various ways:

Manufacturers and product developers

- ▶ Supports strategic development and tactical decisions
- ▶ Market forecasting
- ▶ Identifies latest technology trends & developments

Investors

- ▶ Commercial due diligence, product appraisal
- ▶ Market forecasting
- ▶ Competitive market environment

Electricity and gas utilities

- ▶ Informs market strategy and tactical decisions
- ▶ Supports technology selection and partnering decisions
- ▶ Market forecasting

Delta Energy & Environment is an independent research and consulting company specialising in markets for low carbon products and technologies that are deployed in residential & commercial buildings.

Delta supports a range of clients with small-scale CHP – see our website for sample projects

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