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THE ROADMAP TO EFFICIENT GAS TECHNOLOGY SYSTEMS IN THE DOMESTIC HEAT SECTOR

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**Pathways
& Roadmap
Research Service**

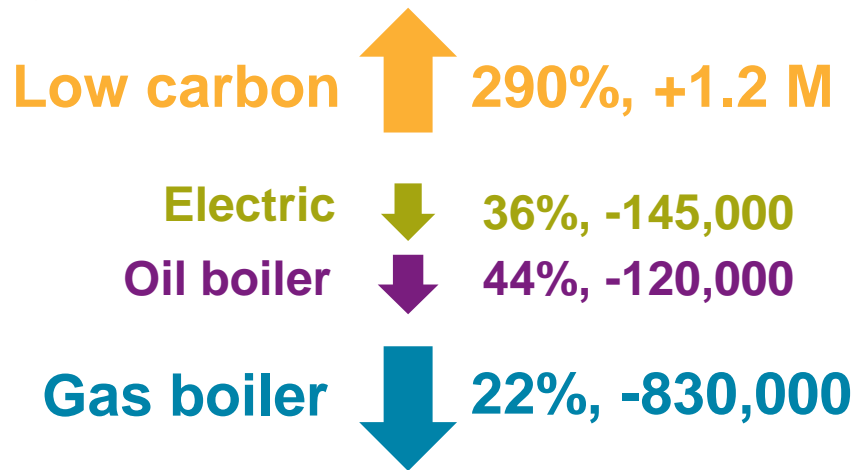
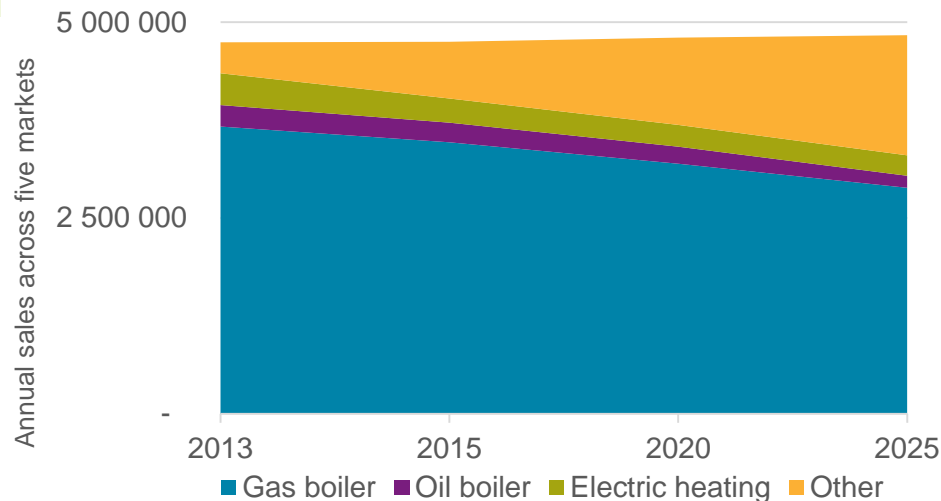
Scenarios, long term market projections, demand modelling



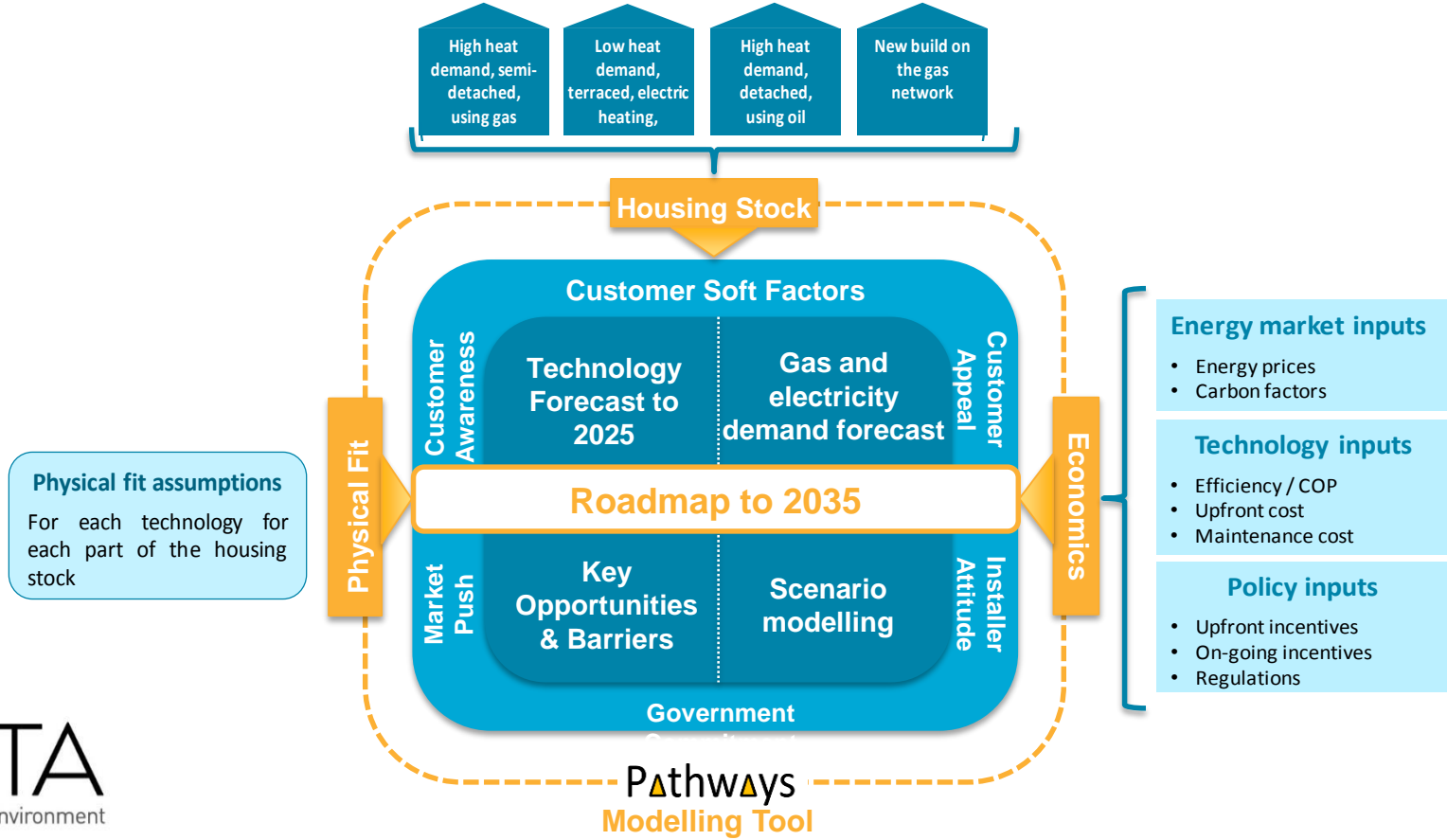
New European Heat study analysing the future role of gas in a transforming energy system.
Contact Jon.slowe@delta-ee.com for details

A big shift towards low carbon will happen by 2025

Outlook for the heating market across France, Germany, Italy, the Netherlands & the UK

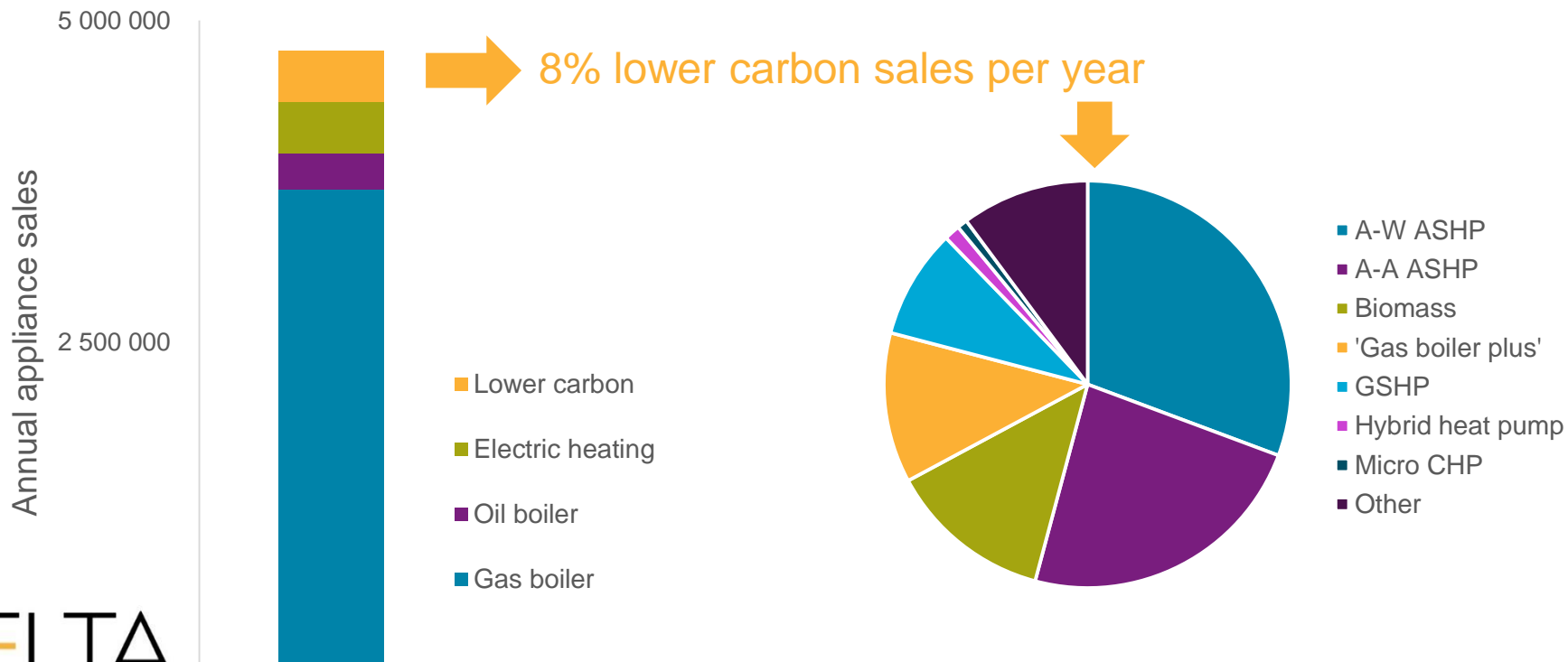


Delta-ee modelling and forecasting methodology



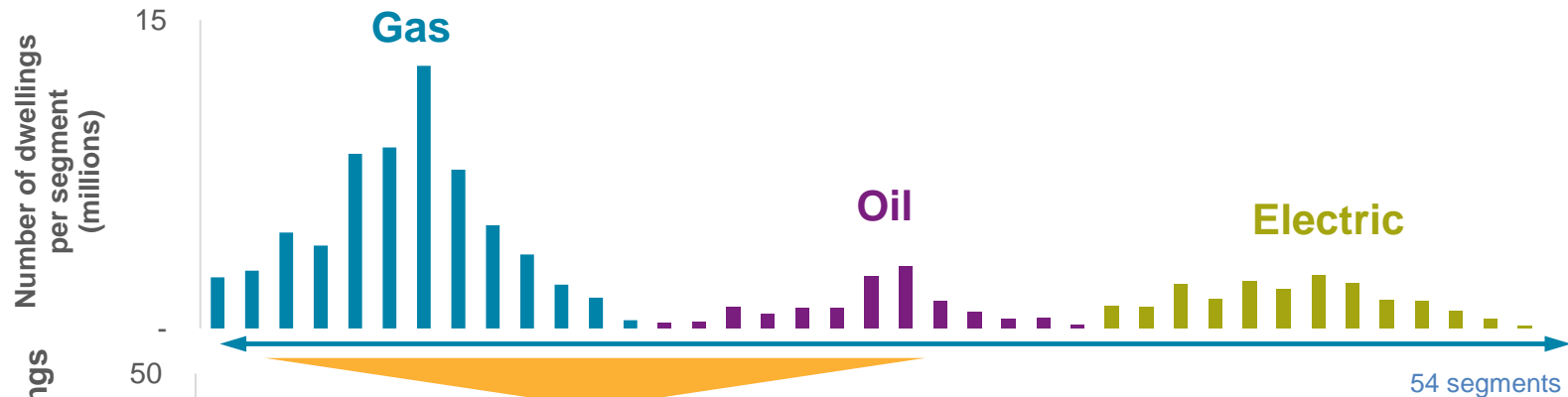
EU heating market today is dominated by gas boilers...

Breakdown of the current heating market across France, Germany, Italy, the Netherlands & the UK



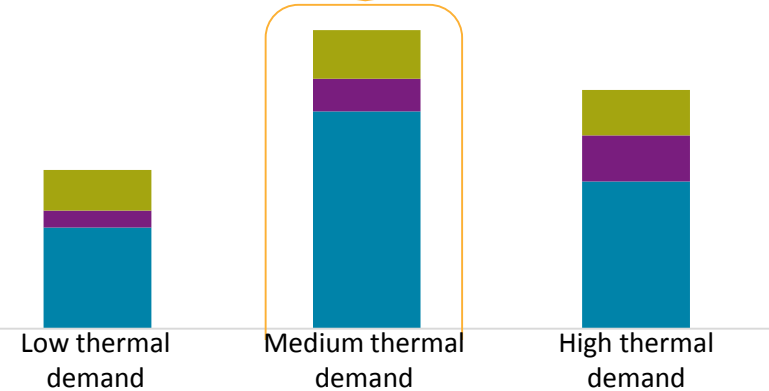
What does the EU housing stock look like?

Two thirds of dwellings in France, Germany, Italy, the Netherlands & the UK are heated by gas today



Number of dwellings (millions)

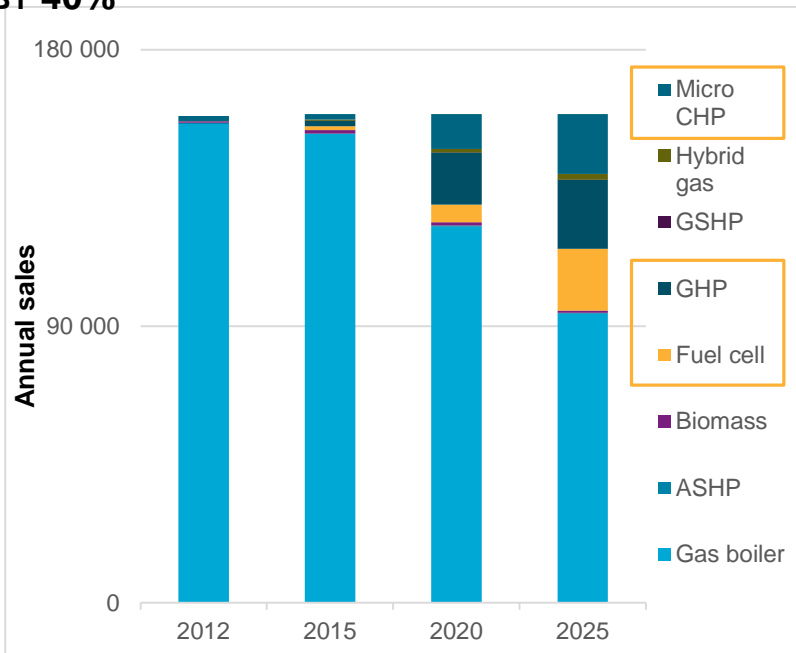
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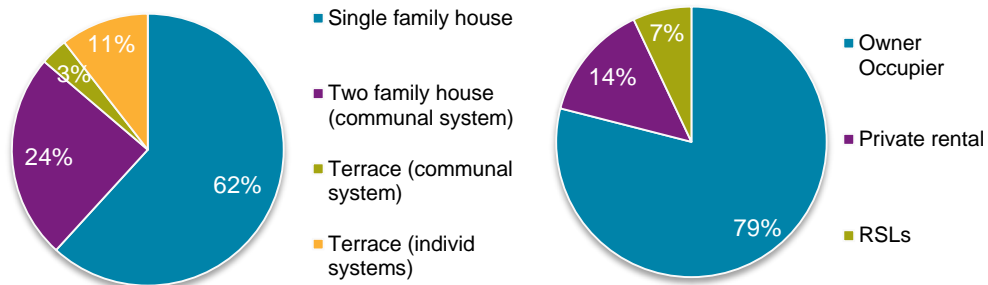
Medium thermal demand homes represent the largest share of dwellings – this could change by 2025.

Germany Case study: Existing gas homes & 'moderate' thermal demand

REFERENCE SCENARIO – GAS BOILER SALES SHRINK BY 40%



BREAKDOWN OF SEGMENT BY HOUSE TYPE AND TENURE

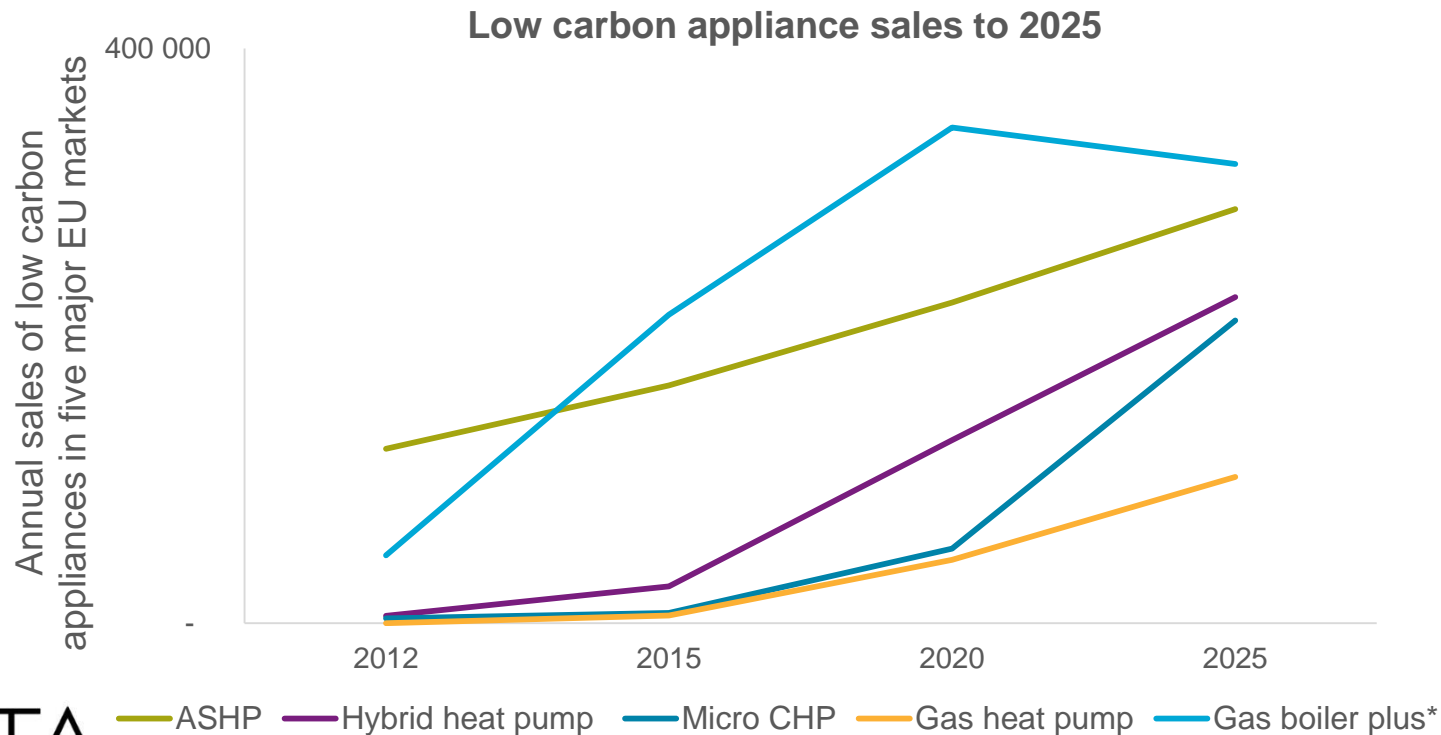


3.5 M homes

22.5 MWh/year

Current market of 158,000 boilers / yr in this segment

Gas vs electric based appliances – which will win?



Thank you for your attention

Roadmap Service: Key benefits



Target the right customers



Develop the right technology offerings at the right time



Grow sales in your market & identify opportunities.



Independent expert view of the latest technology trends.

Pathways Tool: Key benefits



Size the opportunities with our technology benchmarking tool



Understand the threat to your markets and business from competing and new technologies.



Find the best markets – make the right decisions for R&D investment.

New European Heat study analysing the future role of gas in a transforming energy system

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