

# Made in the EU: Clean heating for you

Decarbonising heating and cooling means local jobs and global competitiveness for Europe's industries: a policy push is needed to unlock its full potential.

Cool Heating Coalition

Heating and cooling is about half of all energy use.

Heating in buildings alone is a multi-billion euro market providing 1.8 million EU local jobs.

There are about **100M HEATERS** in the EU

➔ **60%** are **old, inefficient** and need urgent replacement

**75%** of EU homes use **expensive and polluting** heating systems mostly using **imported fossil fuels**

Accelerating the clean heating and cooling transition is an opportunity for EU industries to scale up.

Strategic net-zero technologies are on the market today  
Heat pumps, solar thermal and geothermal have good potential for rapid scale-up

## HEAT PUMPS

22.2 million heat pumps installed in the EU  
416,000 direct and indirect jobs  
>250 EU manufacturing sites with a turnover of €14.5 billion  
73% of domestic demand covered by EU production  
20% of global manufacturing capacity

## SOLAR THERMAL

supplies 10 million EU households  
18,400 direct jobs  
€1.79 billion of sales and net global exporter  
Europe is a technological leader

## GEO THERMAL

heats 2 million EU homes via heat pumps and district heating (DH)  
262 geothermal DH systems - capacity 2.2 GWth in 2021  
154,300 geothermal heat pumps (EU, 2023):  
11.7% increase on 2022

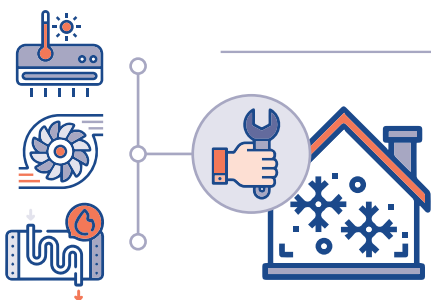
## DISTRICT HEATING & COOLING

12% of EU heating market: 17,000 DH networks  
7% of EU district heating powered by geothermal, solar, heat pumps and waste heat  
Globally, Europe leads on clean district heating

## ENERGY RENOVATION

Renovating Europe's building stock and electrifying the heating supply will help create 1.2 million new additional jobs and 1% GDP increase by 2050

**CO<sub>2</sub>** **ZERO EMISSION 2050**



**3-4%**

Current rate of heating system replacement per annum (inc. like-for-like replacement)



**6%**

Replacement rate of fossil fuel heating with clean heat necessary for decarbonisation by 2040

IT'S TIME FOR AN EU ACTION PLAN AND A CLEAN INDUSTRIAL DEAL FOR HEATING AND COOLING.