



The solar collector market in Poland in 2010



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1. Introduction

The Institute for Renewable Energy has been conducting research on the solar collector market in Poland for ten years. Aggregated data for Poland is published in a concise report titled "Rynek kolektorów słonecznych w Polsce" which is submitted, among others, to the following:

- the Polish Central Statistical Office (the data is published every autumn in the "Odnawialne źródła energii"),
- European Commission (the data published at the web site of the Directorate for Energy as part of the ongoing EurObserv'ER project concerning the EU renewable energy market),
- International Energy Agency (IEA) (the data published in the "Solar Energy in the World"),
- European Solar Thermal Energy Federation (the data published in the report titled "The Solar Energy Market in Europe"),
- Ministries of Economy, Environment, and Infrastructure as well as the Energy Regulatory Office and other central state administration bodies in Poland for use in their current work.

Summary research results are also made available to all persons concerned via the Institute's web site www.ieo.pl and several dozen information media, and also foreign periodicals such as the "Sun&Wind Energy" and specialist portals, such as the Global Solar Thermal Energy Council.

This report is a source document for the other publications and press reports. It provides full data and presents a comprehensive review of all the results of the solar thermal energy market in 2010 with historical trends, and short- and long-term forecasts taken into account. The report is based, to a large extent, on the original results of questionnaire surveys undertaken among Polish and foreign manufacturers of solar collectors, who sell those collectors (usually as complete systems) on the Polish market. In principle, the report does not contain sales figures of various companies in a given year. The only form of individual promotion of the collaborators (the suppliers of data in the format required) is the presentation of their logos in the report. Twenty four companies representing more than 80% of the Polish solar collector market took part in the direct market research in 2010. At the report preparation stage, the research results were

discussed with key players on the market, compared with the other available reports pertaining to Poland and the whole of EU and covering, to a various extent, the solar thermal energy markets. The research results were then verified and commented on as appropriate.

The research concerning 2010 took into account the traditional regional sales pattern, export and, for the first time, issues relating to jobs created in the sector in question. The full report on the solar collector market research results for 2010 in Poland also considers the results of the Institute's own research into, among other issues, the detailed volume and pattern of production of solar thermal energy devices. Attached to this report is Enclosure 1 (an Excel file enabling the sorting and comparing of the products), which contains the results of the review of the products on offer comprising nearly 350 devices, their technical characteristics and economic factors (the prices) as well as the available certificates issued for those devices. The report for 2010 also covers the analyses of the available support systems and forecasts for the entire industry.

While undertaking to gather and process information continuously, the Institute for Renewable Energy wishes to thank the companies providing raw data. The solar thermal energy sector in Poland has an increasing industrial and installation potential on both the national and European scale. Owing to data publication, that sector is becoming to be regarded by central level authorities and state administration bodies as a serious technological option enabling Poland to fulfil its obligations for 2020 following from the new European Directive on the promotion of use of energy from renewable sources.

As confirmation of the above statement and of the increasingly greater focus of attention to the potential of solar energy in Poland, the "National Action Plan for Renewable Energy Sources" of December 2010 was developed. The plan estimates that nearly 15 million square metres of solar collectors will be installed in Poland by 2020, with the average annual growth rate of almost 40%. Whilst that is a strong challenge to the entire solar thermal energy sector, the research results for 2010 indicate that even during the world-wide economic slowdown the industry has kept a high growth rate at the level of 30% and new companies and improved products appeared on the market. The authors invite the readers to study the detailed results of research and analyses.