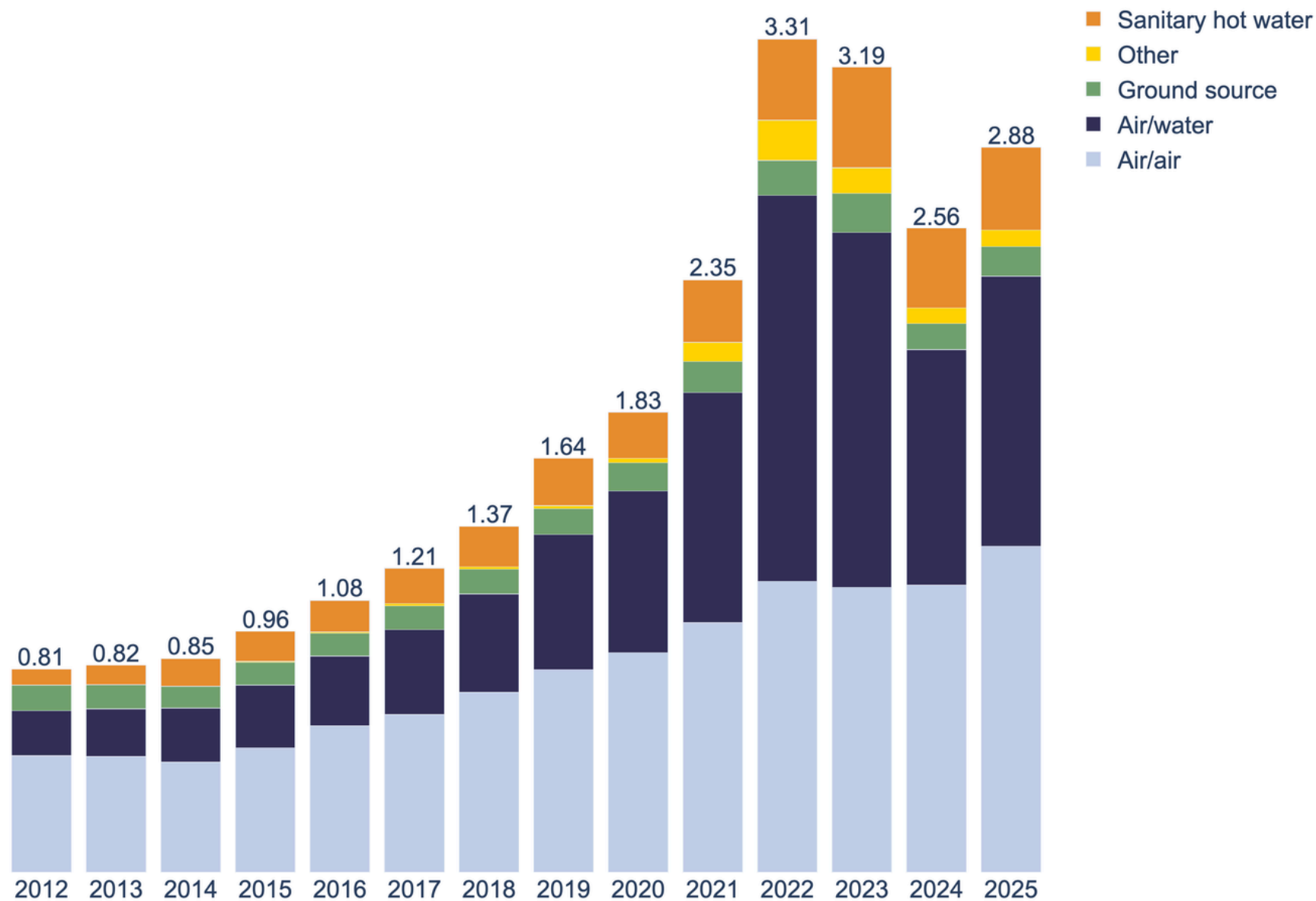
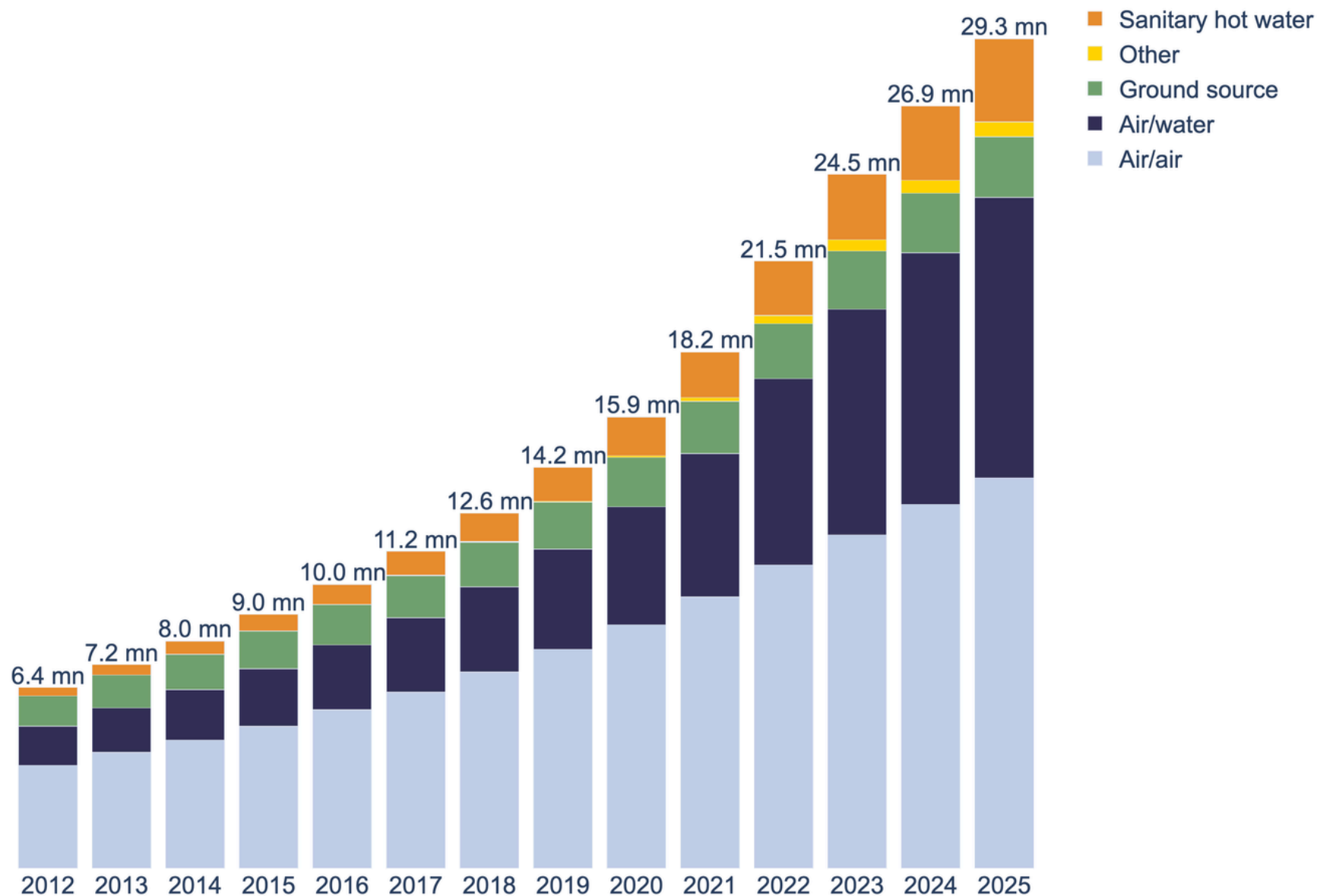


Annual sales of heat pumps, in millions (18+3 countries)



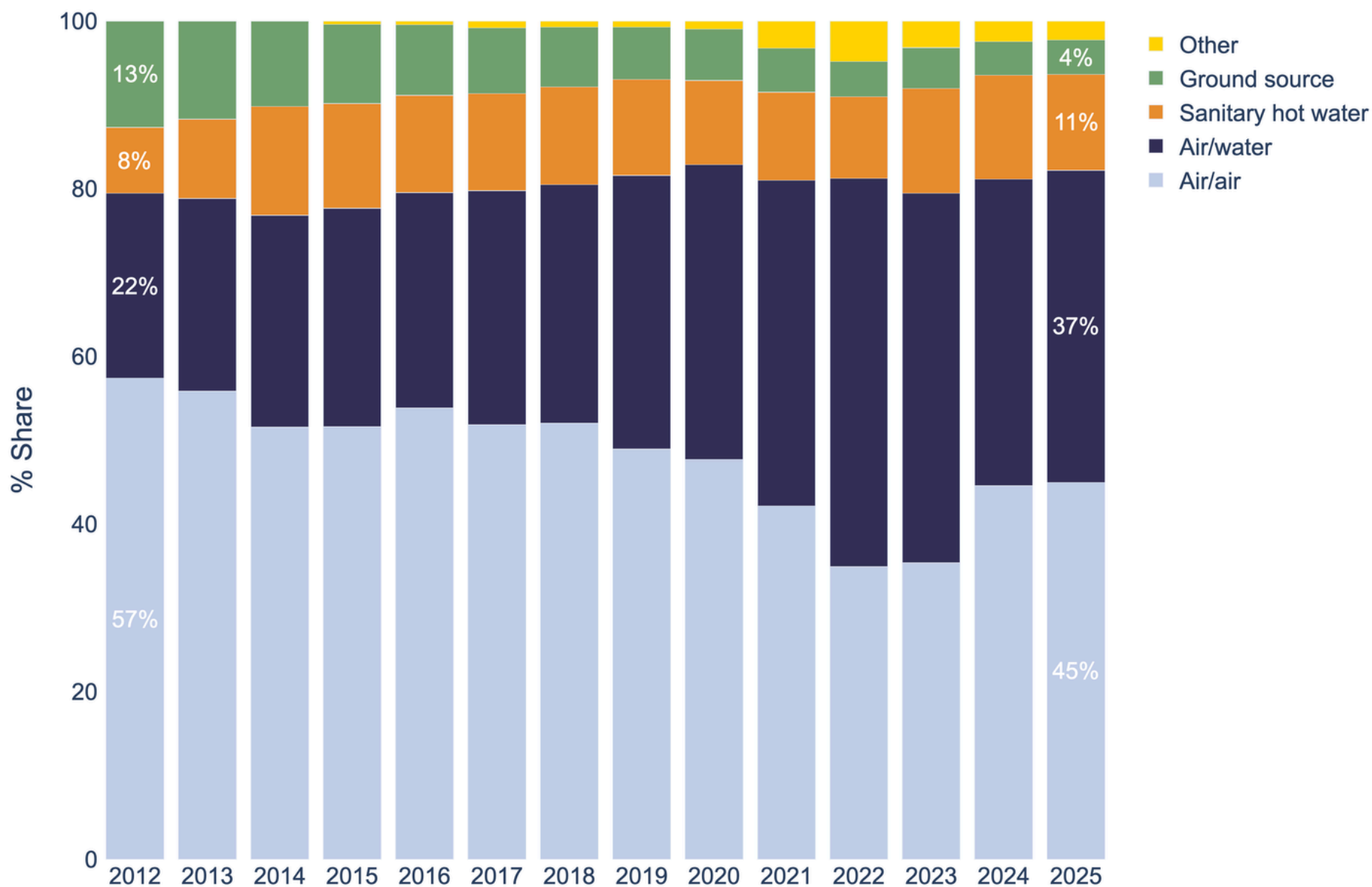
18 countries (2025 sales reported): AT, BE, CH, CZ, DE, DK, ES, FI, FR, IT, LT, NL, NO, PL, PT, SE, SK, UK
3 countries (2024 values carried forward): IE, HU, EE

Annual stock of heat pumps (18+3 countries)



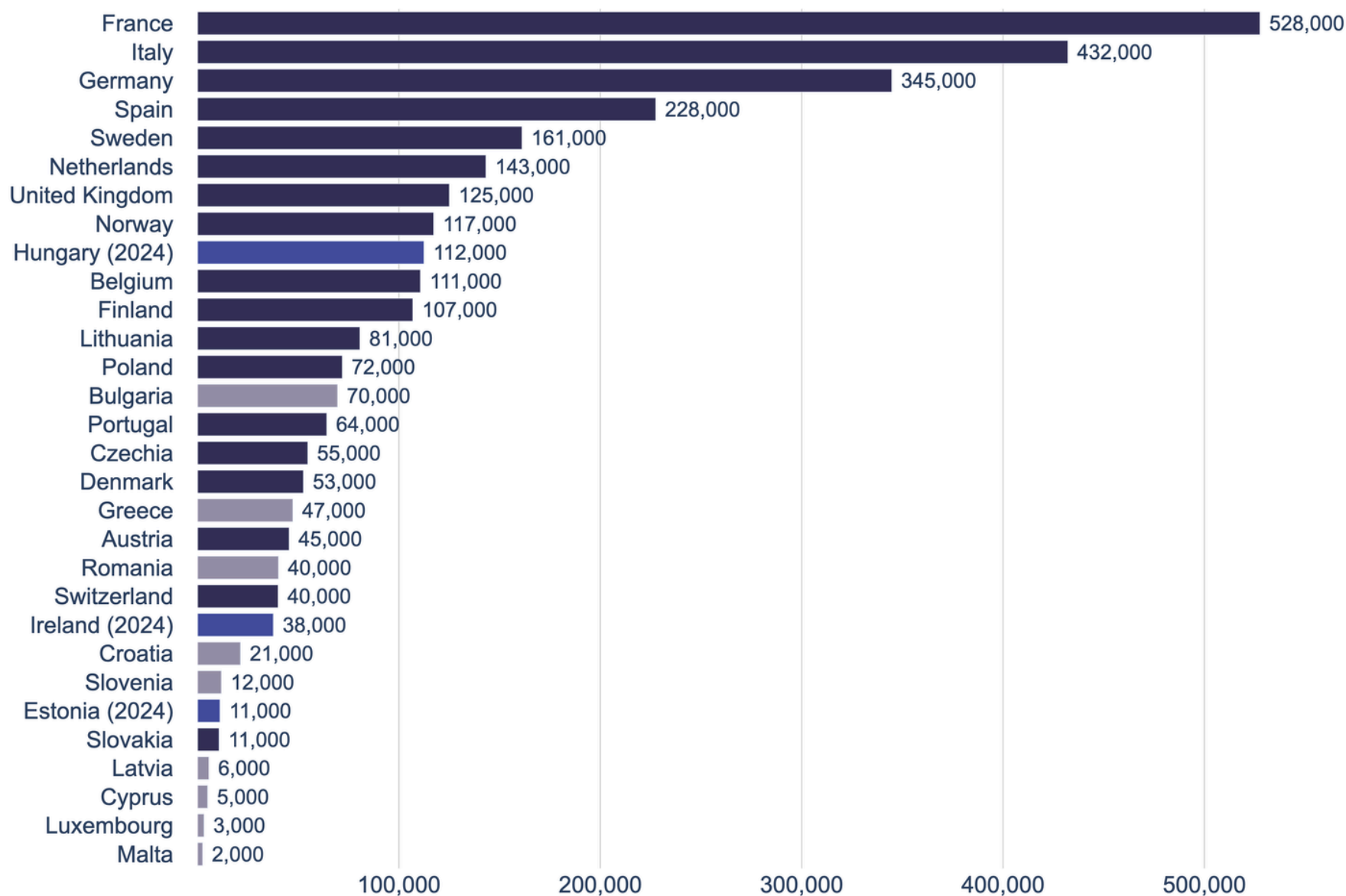
18 countries (2025 sales reported): AT, BE, CH, CZ, DE, DK, ES, FI, FR, IT, LT, NL, NO, PL, PT, SE, SK, UK
3 countries (2024 values carried forward): IE, HU, EE

Sales share by type, 2012 to 2025 (18+3 countries)



18 countries (2025 sales reported): AT, BE, CH, CZ, DE, DK, ES, FI, FR, IT, LT, NL, NO, PL, PT, SE, SK, UK
 3 countries (2024 values carried forward): IE, HU, EE

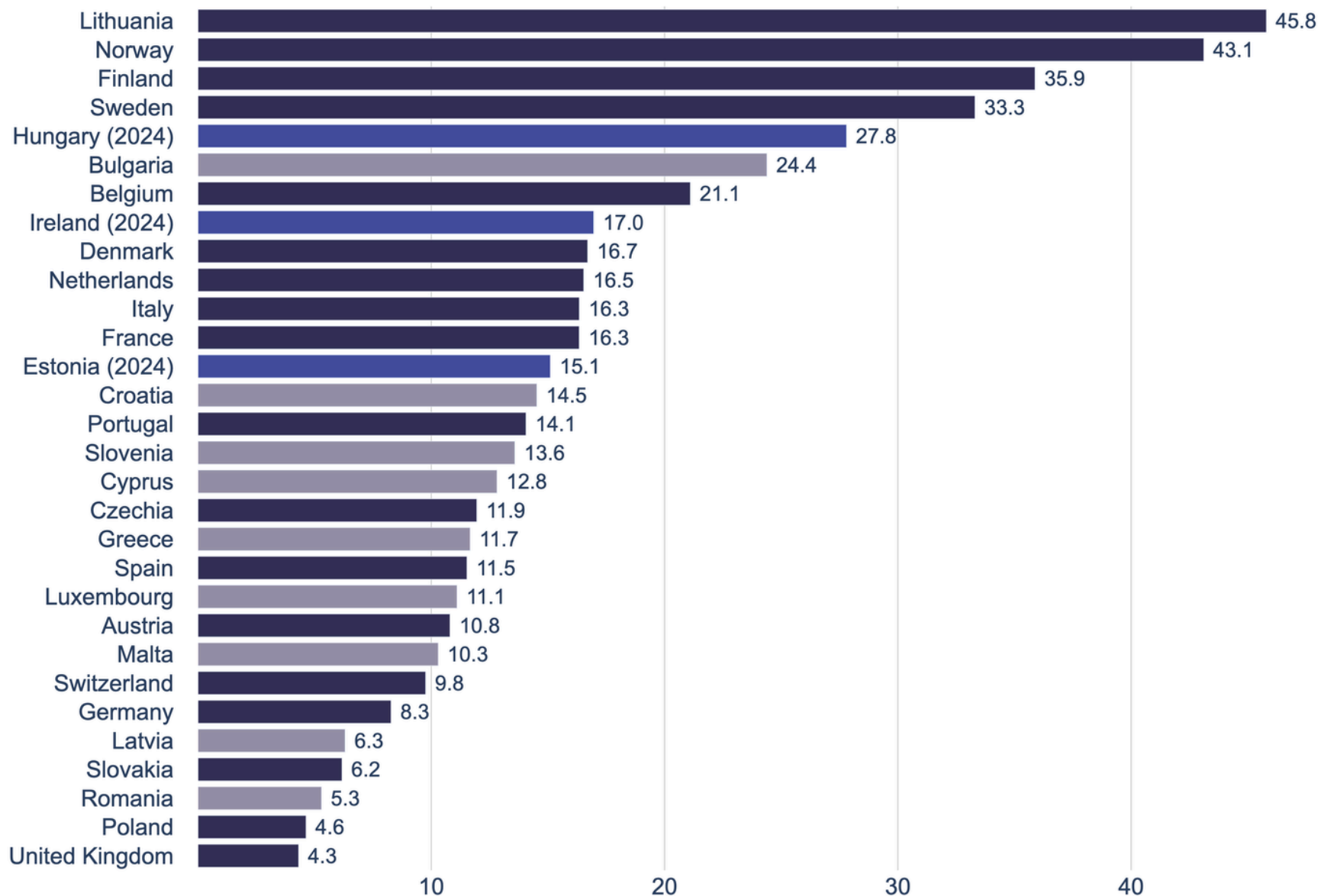
Sales of heat pumps in 2025, by country (18+3+9 countries)



Source: European Heat Pump Association

■ 2025 sales (18 countries)
 ■ 2025 additional countries estimations
 ■ 2024 sales figures

Sales per 1,000 households in 2025, by country (18+3+9 countries)

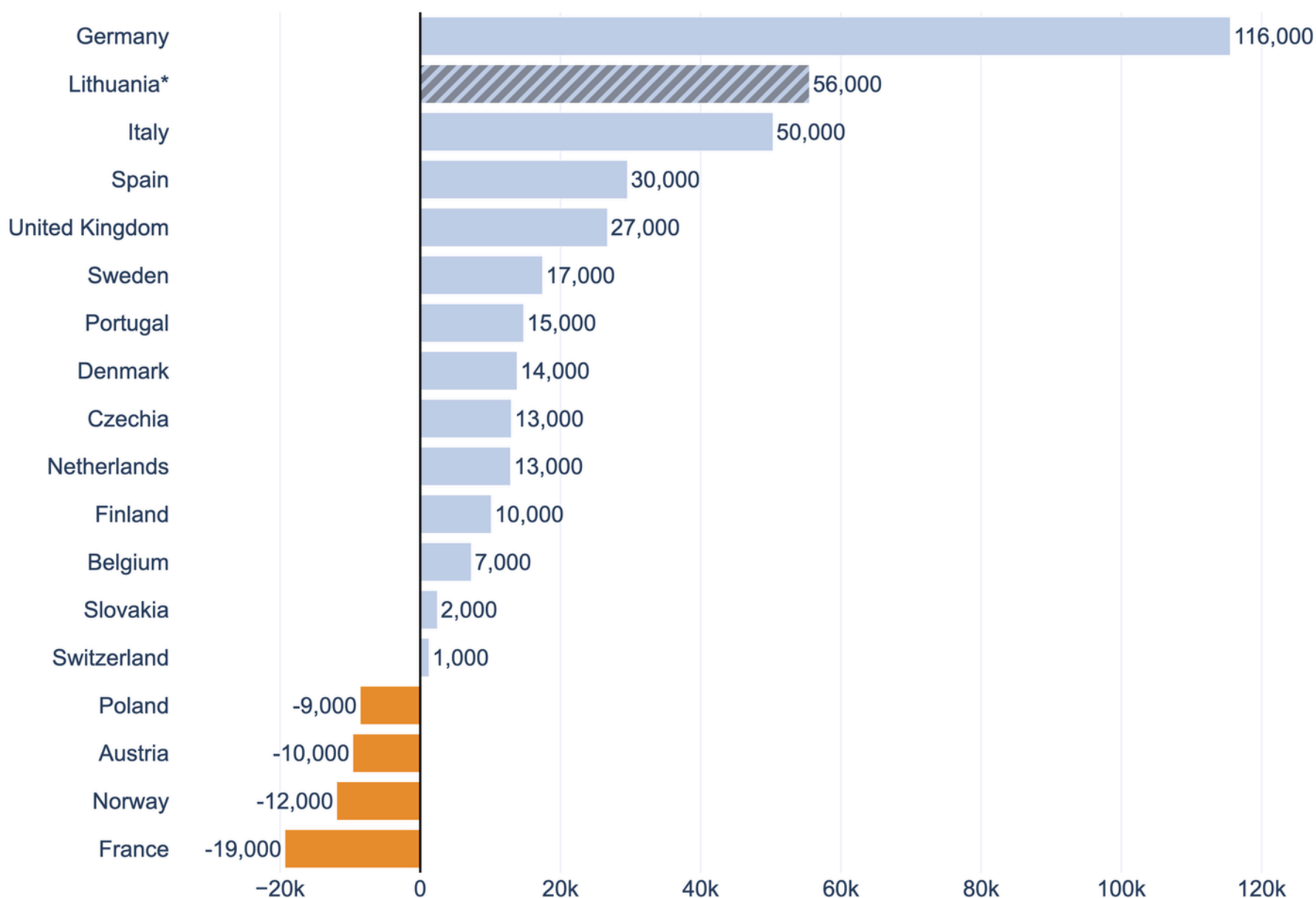


Source: European Heat Pump Association

Note: number of households for Switzerland as of end of year 2024

■ 2025 sales (18 countries)
■ 2025 additional countries estimations
■ 2024 sales figures

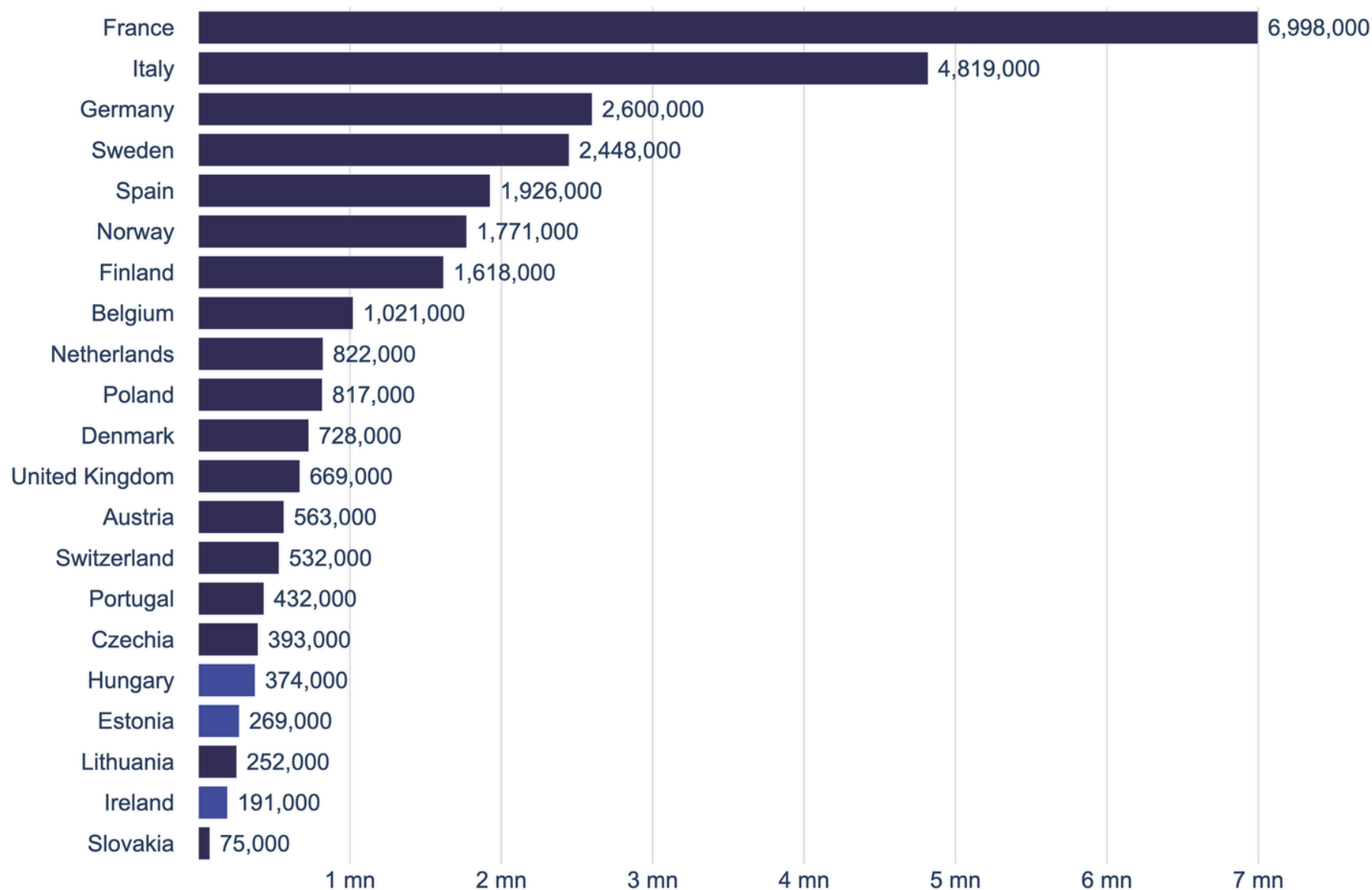
Absolute change in heat pump sales (2024 vs 2025) (18 countries)



Source: European Heat Pump Association

* Lithuania improved sales reporting starting 2025

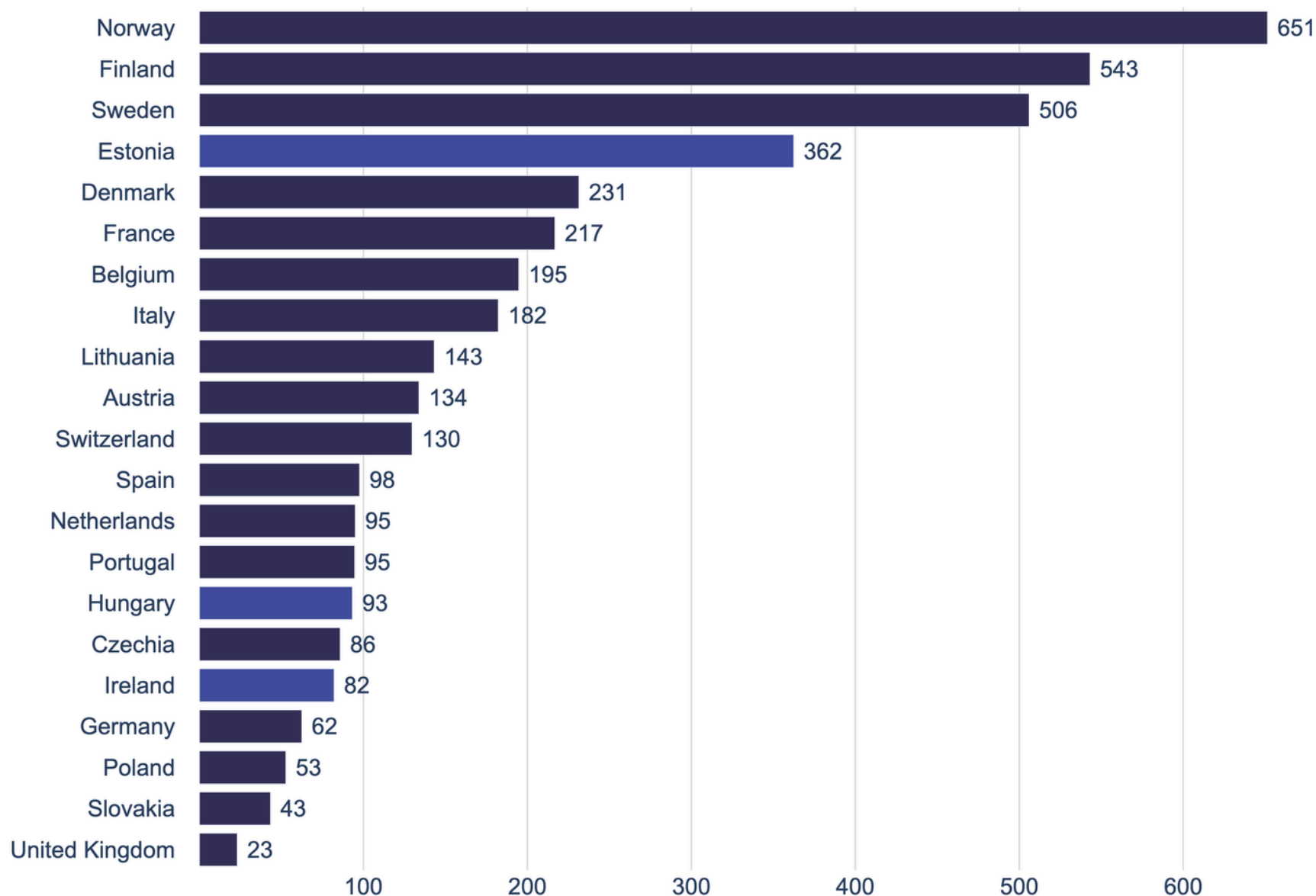
Stock of heat pumps in 2025, by country (18+3 countries)



Source: European Heat Pump Association

■ 2025 stock (18 countries)
■ 2025 stock incl. 2024 sales carried forward

Stock of heat pumps per 1,000 households in 2025, by country (18+3 countries)

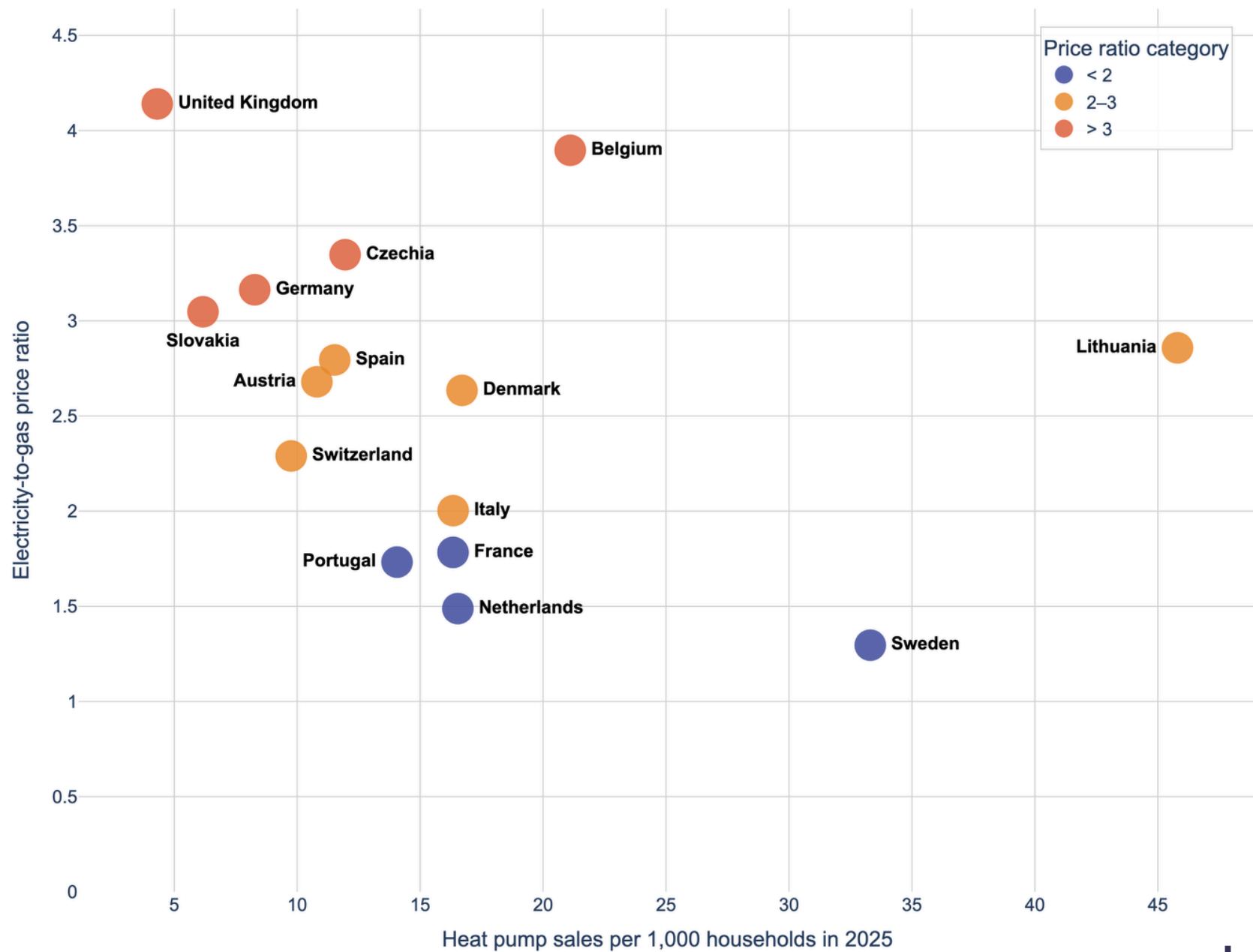


Source: European Heat Pump Association

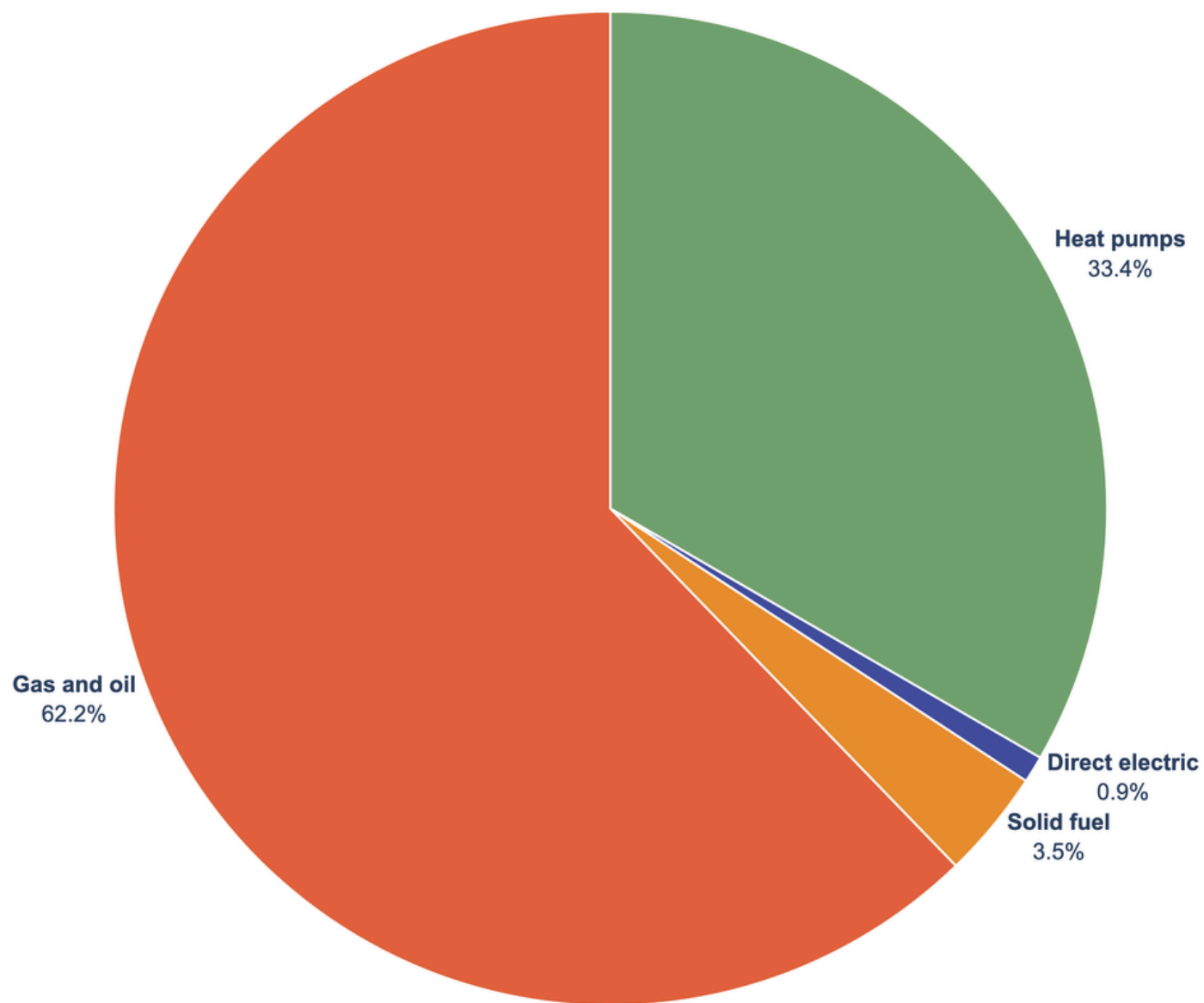
Note: number of households for Switzerland
as of end of year 2024

■ 2025 stock (18 countries)
■ 2025 stock incl. 2024 sales carried forward

Lower electricity-to-gas price ratios lead to more heat pump sales per household (2025)



Heat pump market share in space heating sales – 2025 (18 countries)



Source: BRG & EHPA

18 countries (2025 sales reported): AT, BE, CH, CZ, DE, DK, ES, FI, FR, IT, LT, NL, NO, PL, PT, SE, SK, UK