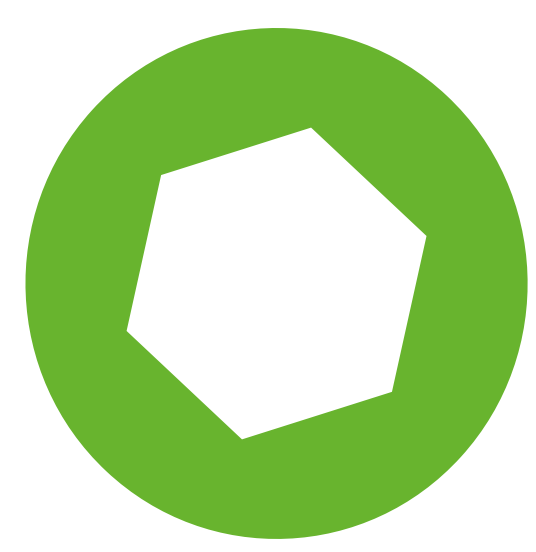




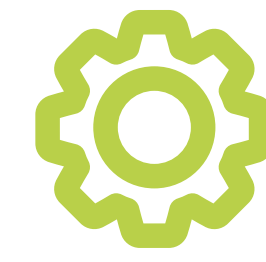
GREEN HEATING SOLUTIONS



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BUILDING AUTOMATION

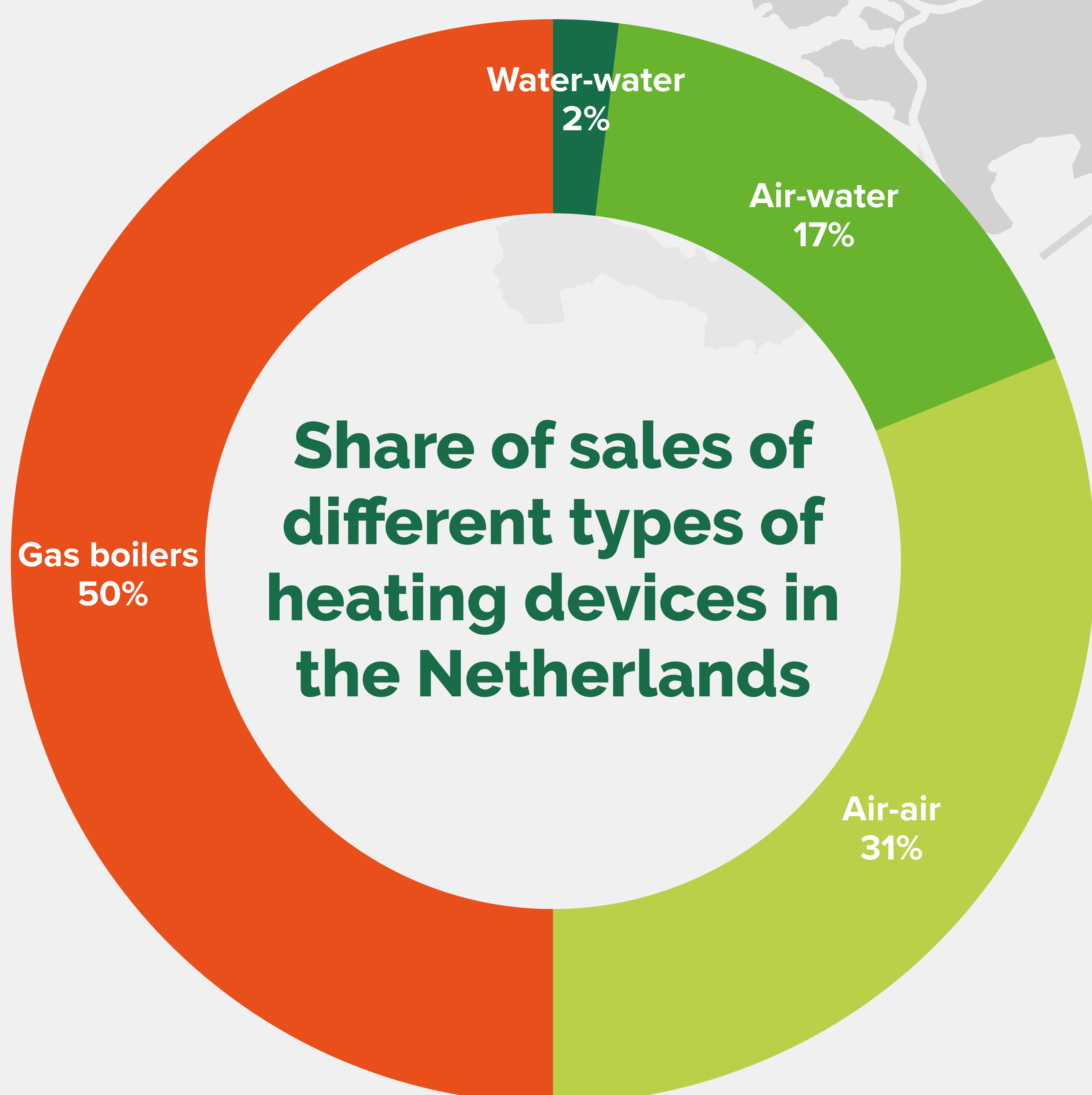
A market in transition

After reaching record levels in 2023, the Dutch heat pump market declined in 2024, with a 25% drop in installed capacity. However, early signs in 2025 point to a gradual recovery. If current trends continue, market performance may return to 2023 levels. In addition, the total number of heat pump systems in the Netherlands increases significantly when air conditioners with heating features are included. Though primarily used for cooling, these devices can serve as partial or full alternatives to traditional gas boilers potentially accelerating decarbonization readiness across Dutch households.

In 2024, residential heat pump sales fell by

30%

compared to 2023. Nonetheless, strong marketing efforts especially in response to changes in the ISDE subsidy boosted sales in early 2025.



's-Hertogenbosch

By 2024,

26%

of Dutch households had installed some type of heat pump.

Instead of the targeted 1 million hybrid heat pumps by 2030, projections now estimate around

720,000

systems will be installed.

In 2023, the residential sector accounted for

20%

of final energy consumption in the Netherlands, totaling 323 PJ (90 TWh) where heat pumps can play a key role in energy transition.

The future of heat pumps in the Netherlands

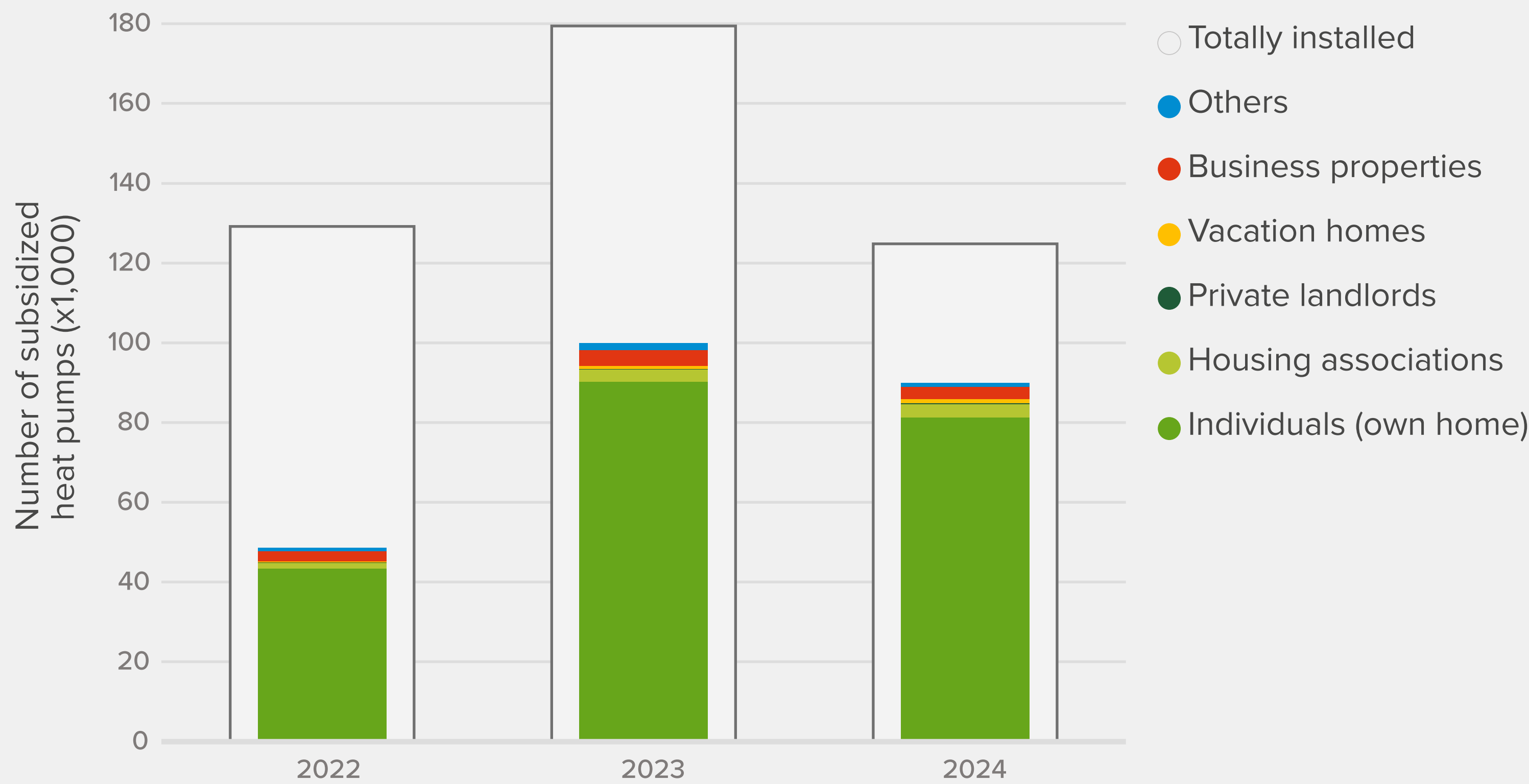
Heat pumps remain a key pillar in the Netherlands' decarbonization strategy. Despite short-term fluctuations, the government's target of 1 million hybrid heat pumps by 2030 continues to shape the industry's direction. Air-to-water and hybrid models will dominate retrofit markets, as more households face decisions about replacing their gas boilers. Overall, up to 300,000 heat pumps could be installed annually by 2030, primarily all electric systems. As the Netherlands moves toward a gas-free future by 2050, stable policy and consumer confidence will be crucial to unlocking the full potential of this technology.



Hrvoje Medarac, PhD
Head of Dutch New Energy Research

Subsidies are key to heat pump adoption!

- In 2024, over 72% of new heat pumps were installed with ISDE support.
- Nearly 90,000 out of 125,000 systems used the subsidy.
- 90% of ISDE applications came from private homeowners.
- Installations dropped by 10% in 2024.

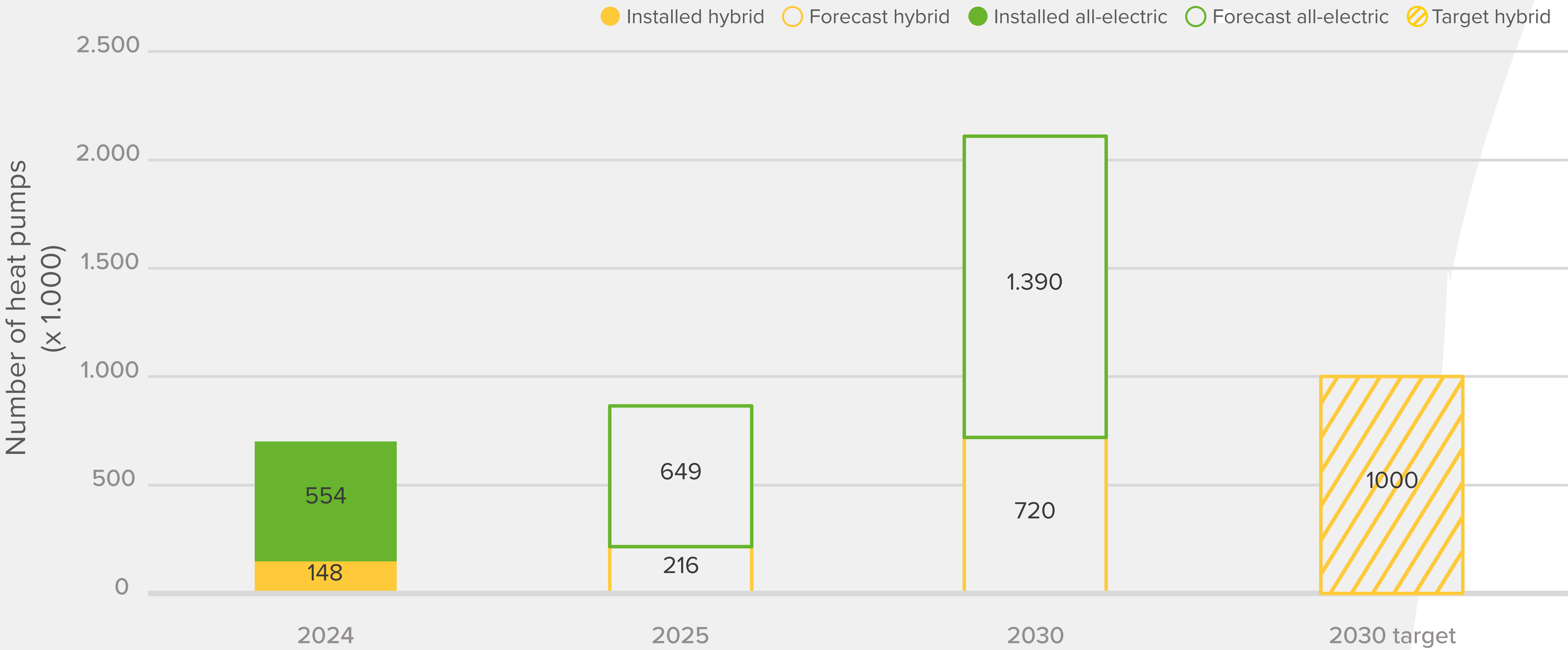


Heat pump adoption is gaining ground in Dutch households

By 2024, 26% of Dutch households had installed some type of heat pump, marking significant progress in the transition away from gas boilers. This includes 2% with water-to-water systems, 7% with air-to-water heat pumps, and 18% with air-to-air units (mainly air conditioners with heating capability). While these figures exclude larger-scale heat pumps used in apartment complexes and utility buildings, they show a clear trend following the uptake of solar panels.

Forecast

Overall, annual residential installations are expected to rise gradually, reaching nearly 300,000 units by 2030, with all-electric systems forming the majority and hybrid systems maintaining a substantial share.



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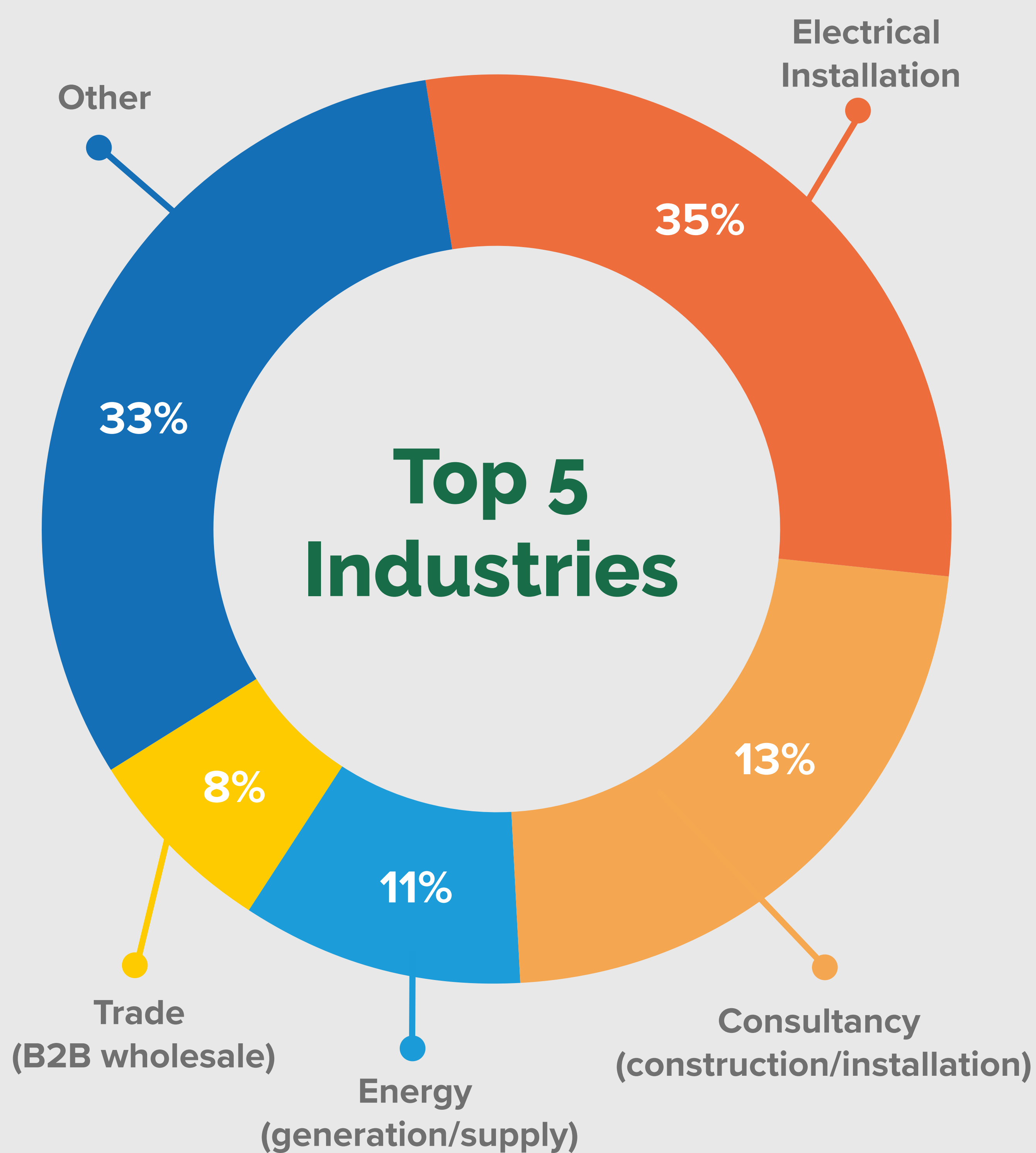
Visitor profile Green Heating Solutions

Visitor analysis

Visitor analysis	Totale
Total exhibitors	77
Total visitors	2.881

Top 3 country of origin

The Netherlands	93%
Belgium	5%
Germany	2%

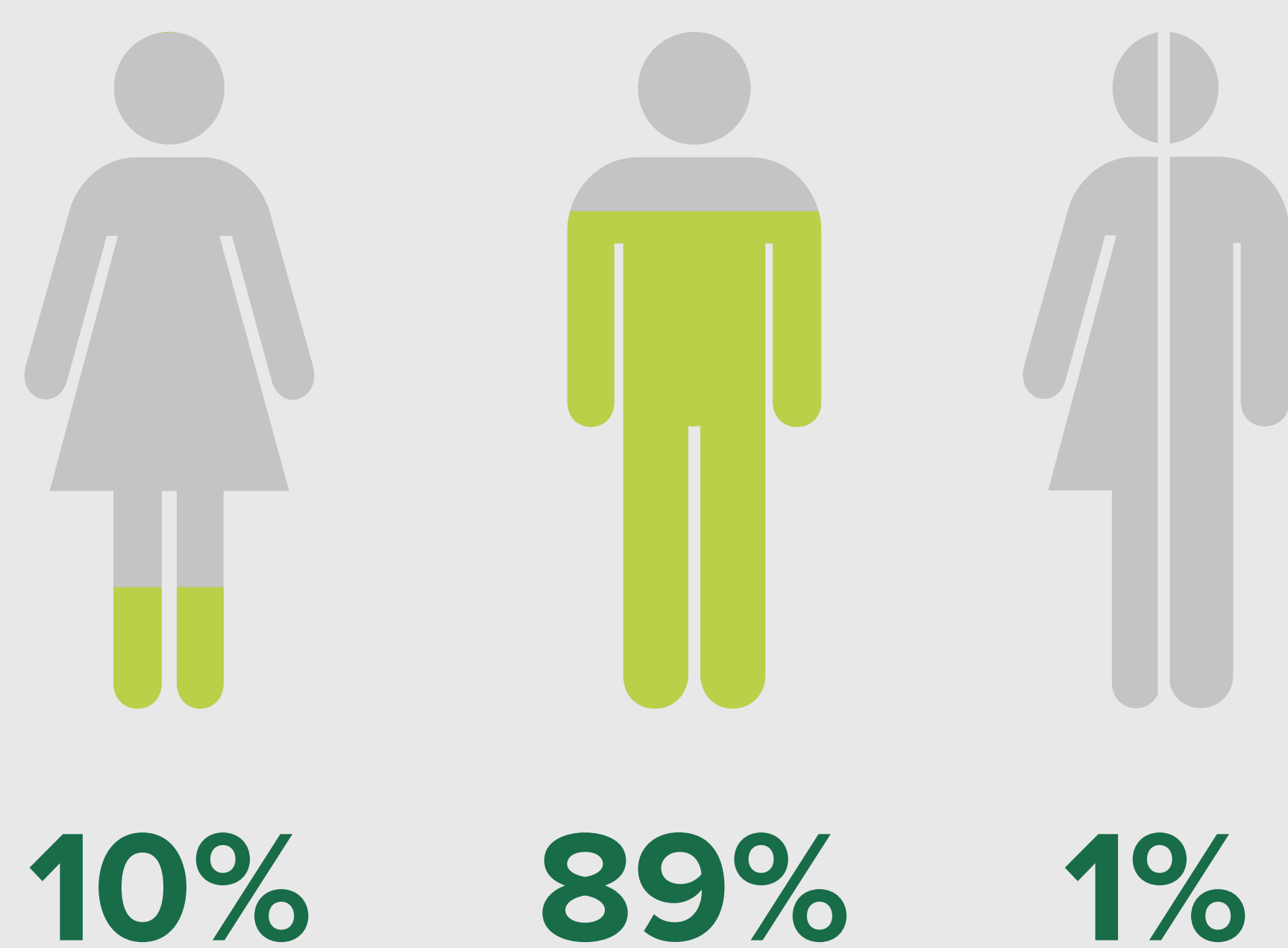


Our visitors are decision makers

Our visitor group primarily consists of key decision-makers within the industry. This includes Business Owners, Senior Management, Managing Directors, employees in various roles, as well as representatives from government institutions and other function groups. This diverse mix ensures that Solar Solutions Amsterdam brings together the people who shape the future of our sector.

Top 5 functions

1. Business owner	32%
2. Senior management	26%
3. Other	23%
4. Technical employee	11%
5. Freelance / Independent contractor	8%



Gender in the industry

Currently, 89% of visitors are men. We are actively committed to initiatives that increase visibility and opportunities for women and non-binary individuals in this male-dominated sector. Through inclusive programs, role models, and targeted support, we aim to contribute to a more balanced representation and help make the industry more attractive and accessible to everyone.



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