

A photograph of a modern, two-story house with a light grey facade and large windows. A grey heat pump unit is mounted on the exterior wall. The house is surrounded by greenery, including trees and a wooden fence. A semi-transparent teal banner is overlaid on the image, containing the title and subtitle.

European Heat Pump Monitor (EHPM) 2026:

Inside the decisions that shape the Heat Pump market

A close-up photograph of a hand holding a white chess piece (a king) over a black chess piece (a king) on a chessboard. The lighting is dramatic, highlighting the textures of the pieces and the hand.

Europe's heat pump market is accelerating - and becoming more complex.

Heat pumps are central to Europe's shift away from fossil-fuel heating.

But the pace of transformation is uneven, and real-world adoption depends on factors that shift quickly:

- Constantly evolving **subsidy schemes and national/EU regulations**
- Rapid introduction of **new technologies** such as R290 and hybrid systems
- **Homeowner concerns** about costs, performance, noise, and reliability
- Growing installation **complexity and training needs**
- Strong influence of wholesalers and purchase channels on system choice
- Global geopolitical instability that fuels energy-price volatility and increases pressure on households and policymakers to secure long-term energy independence

**The real story of heat pump adoption isn't written in policy documents.
It's written in the daily decisions of installers and homeowners.**

Heat pump adoption is decided jointly by installers and homeowners.

Two audiences. One complete picture.

Installers influence:

- Which heat pump technology is recommended
- Whether the homeowner even considers a heat pump
- How subsidies are interpreted and applied
- Which suppliers and channels are chosen

Homeowners decide:

- Whether initial investment feels justified
- Comfort with new technologies like R290
- Which performance or noise concerns matter most
- What motivates or delays their switch

The European Heat Pump Monitor captures BOTH viewpoints to reveal how heat pump decisions really happen.



European Heat Pump Monitor (EHPM): Installers

Strategic insights into channels, technology readiness and real-world installation dynamics



SCOPE

- One annual data collection wave
- 7 Countries: Germany, UK, France, Italy, Poland, NL, Sweden
- 850 phone interviews with heat pump installers
- Designed to reflect the realities of the heat pump market today



TOPICS IN FOCUS

- Buying journey & channel behaviour
- Technology readiness
- Barriers and drivers
- Recommendation behaviour and decision drivers
- Product and technology (HP types installed)



DELIVERABLES

- Strategic report with executive summary & advisory notes (June, 2027)



INVESTMENT (annual subscription) = **8.500 €**



European Heat Pump Monitor (EHPM): Homeowners

Understanding attitudes, motivations, barriers and adoption triggers



SCOPE

- One annual data collection wave
- 5 Countries: Germany, UK, France, Poland, Sweden
- 1500 online interviews with homeowners
- Designed to provide understanding of end-users' sentiment and category drivers



TOPICS IN FOCUS

- Awareness & perception of heat pumps
- Key benefits vs. perceived downsides
- Investment considerations (cost, energy bills, trust)
- Policy & subsidy understanding
- Installer influence on the decision
- Decision triggers and hesitations



DELIVERABLES

- Strategic report with executive summary & advisory notes (June, 2027)



INVESTMENT (annual subscription) = **3.400 €**



EHPM 2026: Focused. Strategic. Relevant.

A monitor built around **today's heat-pump** market realities



Focused on the topics shaping 2026 - 2031 demand



Sharp insight into technology readiness, regulation, and installer-led consumer decisions



Clear visibility into the barriers slowing adoption



Sharp , actionable insight accross key European markets



High strategic relevance for product, R&D, channel, and policy teams

Why manufacturers choose EHPM

Stronger insight into how heat pump decisions are made and where they get stuck

- ✓ Understand how installers decide, recommend, and select technologies
- ✓ Identify real adoption barriers faced by homeowners
- ✓ Anticipate shifts in technology acceptance (R290, hybrid, monobloc, split)
- ✓ Strengthen channel and wholesaler strategies with buying-journey insight
- ✓ Improve product design and training programmes based on installer needs
- ✓ Align external communication with installer-observed homeowner concerns

EHPM reveals how heat pump decisions happen on the ground and what manufacturers must do to influence them.

Your trusted EMIM contacts:

Let's explore how EMIM can support your business



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Connect the full construction decision chain

USP's European Construction Decision Intelligence Platform



- **European Architectural Barometer**

- **Contractor Monitor**

- **Handymen Insight monitor**

- **Painter Insight monitor**

- **European Mechanical Installation Monitor**

- **European Electrical Installation Monitor**

- **European Heat Pump Monitor: Installers**

- **Purchase behaviour & channel monitor**

- **European Home Improvement Monitor**

- **European Heat Pump Monitor: Homeowners**

Client Testimonials

What clients value in our market monitors

walraven

Johan Gijsman

Group Director Marketing, Walraven Holding

We have been using European Mechanical Installation Monitor issued by USP for many years for the planning of our strategic initiatives.

:hager

Céline Pineau

Consumer insight researcher at Hager

USP is professional, responsive, didactic, and voluntary. It was easy to exchange my thoughts with them.

Vaillant

Hardy Jaeschke

Senior Manager Market Research

The USP reports help us better understand different B2B target groups, better assess their business situations, and enrich our range of knowledge enormously.

ROTHENBERGER
Specialized technologies in metal

Dr. Christian Heine

CEO, Rothenberger AG

The European Mechanical Installation Monitor gives us great insights and these insights support our strategic decision.

■ GEBERIT

Renato Di Rubbo

Head of global Marketing Piping systems at Geberit

We value USP for the highly competent consulting, the pragmatic and uncomplicated process, and the high quality of its inputs.

Schneider
Electric

Miryam Salvador

Global Channel Director

Their specialized insights into construction and installation markets enable us to make informed go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.



Trusted by industry leaders

Supporting growth across construction, installation and home improvement

Construction



Installation & Home Improvement



About USP Marketing Consultancy

Trusted insights for over 30 years



30+ years of international market research and consultancy experience



Specialised in construction, installation, DIY and real estate



Active in 40+ countries annually



Focused on trends, market developments and actionable insights



A strategic partner, not just a data provider

At USP, we deliver the insights you can truly build on.

Head office



The Netherlands – Rotterdam

Branche office



Croatia – Zagreb

Subsidiary



Germany – Düsseldorf



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