GREEN ENERGY
EXPORT DAY2025

WORKSHOP
District Energy – Germnay

AGENDA

Opening remarks, Lars Hummelmose, Managing Director, DBDH

Germany's district heating transformation - trends, investments, and policy shifts
Stig Aagaard, Energy Advisor, Danish Embassy Berlin

Market opportunities where Danish expertise can support Germany's "Wärmewende"
Dr. Holger Krawinkel, Freelance Energy Specialist

Discussion & knowledge-sharing session

Q&A sessions: Direct engagement with sector specialists

Moderator: Lars Hummelmose, Managing Director, DBDH

Danish Energy Agency
MINISTRY OF FOREIGN AFFAIRS OF DENMARK
STATE OF GREEN
GREEN POWER DENMARK
DBDH
SYNERGI
DANSK ERHVERV
DI Energi

MINISTRY OF FOREIGN AFFAIRS
OF DENMARK
The Trade Council

District heating in Germany

Green energy export day

Stig Aagaard, Energy Attaché

27. August 2025

Agenda

1. **The German building stock**
2. **Policy measures of the former government**
3. **Current status of German heat planning**
4. **Key challenges**
5. **New government priorities**
6. **Infrastructure investment package**
7. **Sum up / way forward**

The German Building Stock – the black sheep of the energy transition

- **Over 50%** of Germany's total energy demand used for heating and process heat.
- Still **heavily reliant on fossil fuels** (natural gas & oil).
- New Government report on emission reduction states **lacking progress in the building sector.**

Source: State of Green (2025)

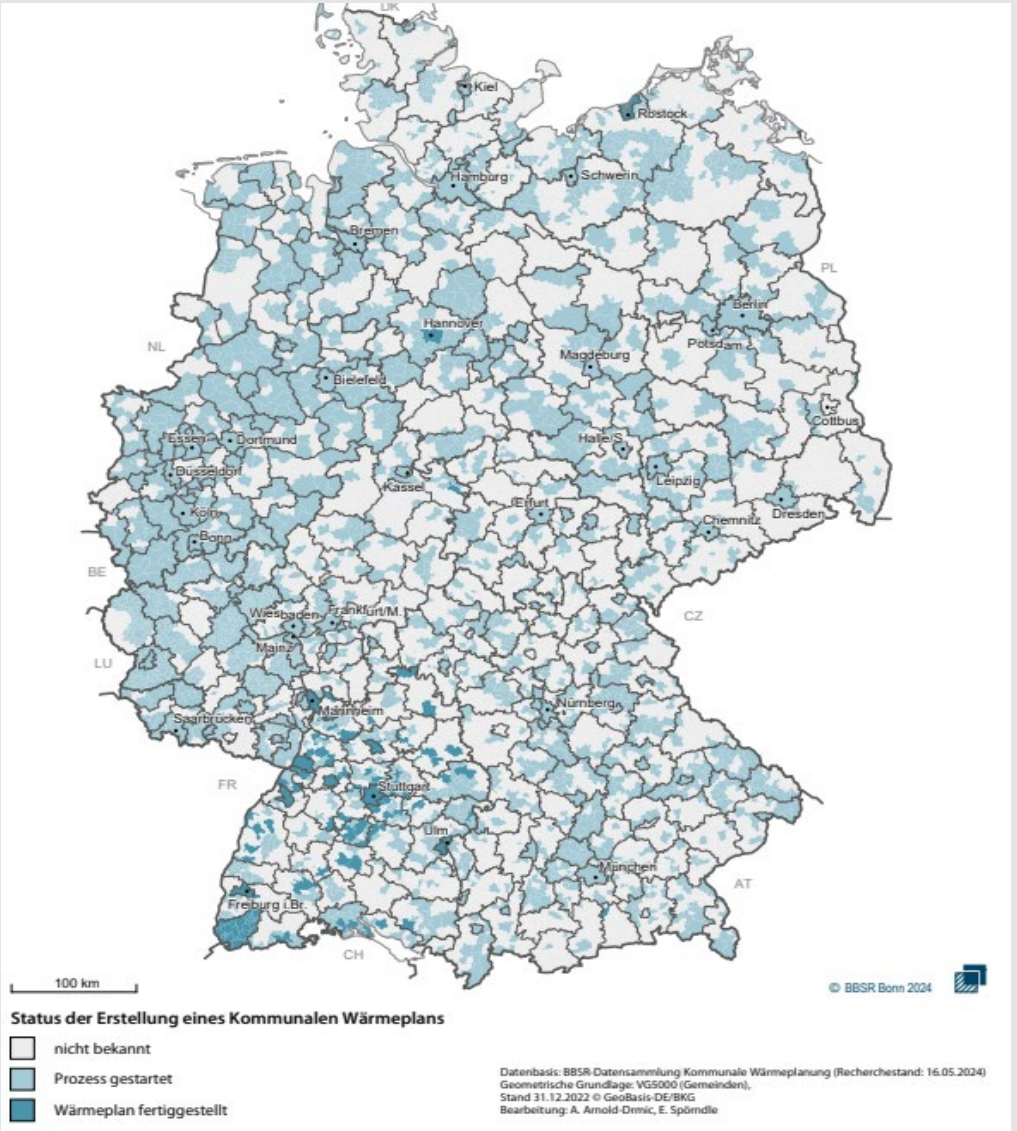
Policy measures of the former government

- **Heat Planning Act**
- Municipalities ≥ 100.000 residents → by 30 June 2026.
- Municipalities ≤ 100.000 residents → by 30 June 2028.
- **Revision of Building Energy Act**
- New heating systems in new-build areas obliged to use at least 65% renewable energy.
- **100,000 annual DH connections**
- 50 percent RE in the grid by 2030.

Current status of heat planing

Municipal heat planning:

- 38% of municipalities have initiated the process of developing a municipal heat plan.
- 119 municipalities (7% of the total population) have published heat plans.
- 1/3 of municipalities: status currently unknown



Current status of heat planing II

- Clear tendency in the direction of more district heating.
- Municipalities with their own utilities well positioned.
- None of the municipalities see possibility for hydrogen-based individual heating.
- Buildings connected annually: 25,000 - 35,000 buildings per year (mainly new builds).

Source: State of Green (2025)

Key challenges

- **Financing**: €43.5 billion by 2030.
- € 100 billion to replace heat production capacity in the existing grid with new technology.
- The utilities are **lacking equity.**
- The **municipalities financially challenged.**

Source: State of Green (2025)

New government priorities

Source: State of Green (2025)

- "Pragmatic energy transition" with a consistent focus on **cost-efficiency, energy security and price incentives.**
- Heating Act from 2023 to be repealed for a **more flexible, technology-open** law focused on CO2 reduction →What will happen to the 65 % rule?
- Public and private funding for energy infrastructure investments → mobilise private capital through public guarantees.

Better Balance in Support for District Heating and individual Heat Pumps

- Better balance funding between BEW (district heating) and BEG (building efficiency).
- District heating rollout **strengthened with increased funding** (e.g. through BEW financing support program) and improved investment frameworks.

Source: State of Green (2025)

Infrastructure investment package

Special Infrastructure Fund (Sondervermögen):

- A €500 billion off-budget fund established in March 2025 (agreement between CDU/CSU, SPD and Greens):
  - **€100 billion to the Climate & Transformation Fund (KTF) for renewables, hydrogen, district heating**
  - €100 billion for states and municipalities

Source: Unsplash, Martin Adams (2025)

Sum up and way a head

- Significant potential for increased district heating rollout.
- Money is not the main problem but securing a sound framework for mobilizing private capital.
- The political process focused on establishing the right legal framework will materialize in 2026.
- The Danish Energy Agency and the embassy in Berlin are in close dialogue with the German authorities about the policy measures.
- Municipalities and utilities already now looking for experience and solutions.

Thank you

Back up

New legislative package focusing on acceleration measures in relation to district heating infrastructure

- The legislative amendments aim to streamline approval processes and increase the speed in connection with the establishment of district heating networks, heat storage, large heat pumps and geothermal projects.

- Like other types of critical infrastructure, projects of this type are given the legal status of being in the overall public interest. This means that they are given priority in weighing up other considerations in connection with the approval process.

- The Ministry of Business and Energy expects that the accelerated approval process will strengthen heat planning for municipalities and cities.

Funding Uncertainty & Political Conflict

- Urgent need for clarity on district heating (BEW) and building efficiency (BEG)
- Coalition agrees to increase BEW and reduce BEG, but disagrees on heat law structure and BEW's annual budget
  - CDU/CSU rejects commitment to €3.5 bn/year for BEW despite calls from energy associations
- Lack of transparency on BEW funding criticised by VKU

Strengthening heat price oversight and introducing an arbitration body

- Increase **transparency and fairness,** as well as strengthen **price oversight** with a simple complaints body

  →Creation of reliable investment conditions balancing consumer protection and supplier interests

- Introduction of a simple, low-bureaucracy arbitration body for disputes between consumers and suppliers
- Arbitration to be activated only in actual disputes, avoiding interference in business decisions
- Aims to protect consumer rights without undermining investment incentives for heat suppliers
- No fixed timeline in coalition agreement → indicating lower political priority
- No agreement on a price cap → likely to reassure heat suppliers

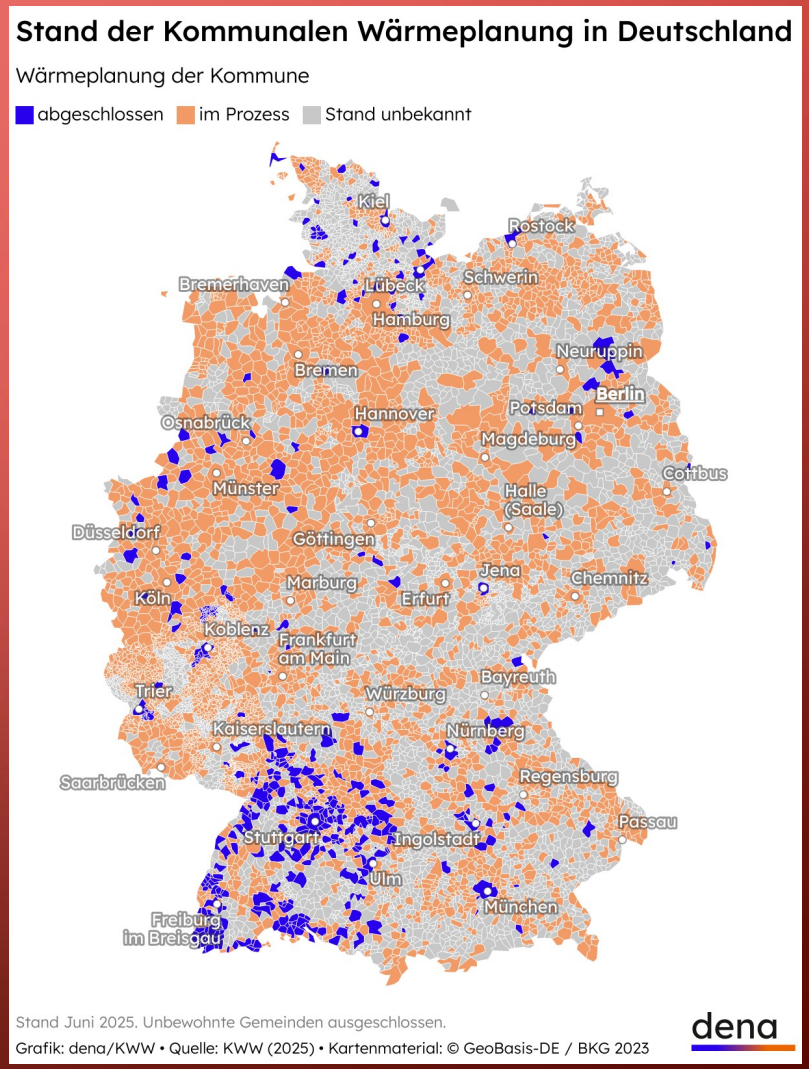
EKSPORTMULIGHEDER FOR DANSKE VIRKSOMHEDER PÅ DET TYSKE FJERNVARME MARKED
DANISH EXPORT DAY,
KØBENHAVN, 27. AUGUST 2025

DR. HOLGER KRAWINKEL, KONSULENT, HAMBORG

EKSPORTMULIGHEDER FOR DANSKE VIRKSOMHEDER PÅ DET TYSKE FJERNVARME MARKED

Velkommen! I dag ser vi på potentialet og mulighederne for danske virksomheder på det tyske fjernvarme marked. En vigtig indikator er den aktuelle status for varmeplanlægningen.

https://www.dena.de/infocenter/stand-der-kommunalen-waermeplanung/



INTRODUKTION OG BAGGRUND

Det tyske fjernvarme marked er et af de største i Europa og kan vokse med 5 til 6 mia. Euro om året frem til 2045 til et volumen på over 100 mia. Euro. Statsstøtte i 2026 ligger på 1,4 mia. Euro.

Tabelle 1: Jährliche Investitionen und jährlicher Fördermittelbedarf bis 2045 in Mrd. Euro/a

jährliche Werte in Mrd. Euro	Investitionen		Förderbedarf	
	2020–2030	2030–2045	2020–2030	2030–2045
EE-Anlagen und Abwärme	2,0	2,1	0,8	0,7
Wärmespeicher	0,3	0,2	0,1	0,1
Anschlussleitungen	0,3	0,3	0,1	0,1
Netzausbau/Erweiterung	3,6	2,3	1,4	0,9
Betriebsbeihilfe Erzeugung	0,0	0,0	0,9	1,7
Summe	**6,2**	5,0	**3,4**	3,5

Quelle: Eigene Berechnungen

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MARKEDSOVERSIGT TYSKLAND

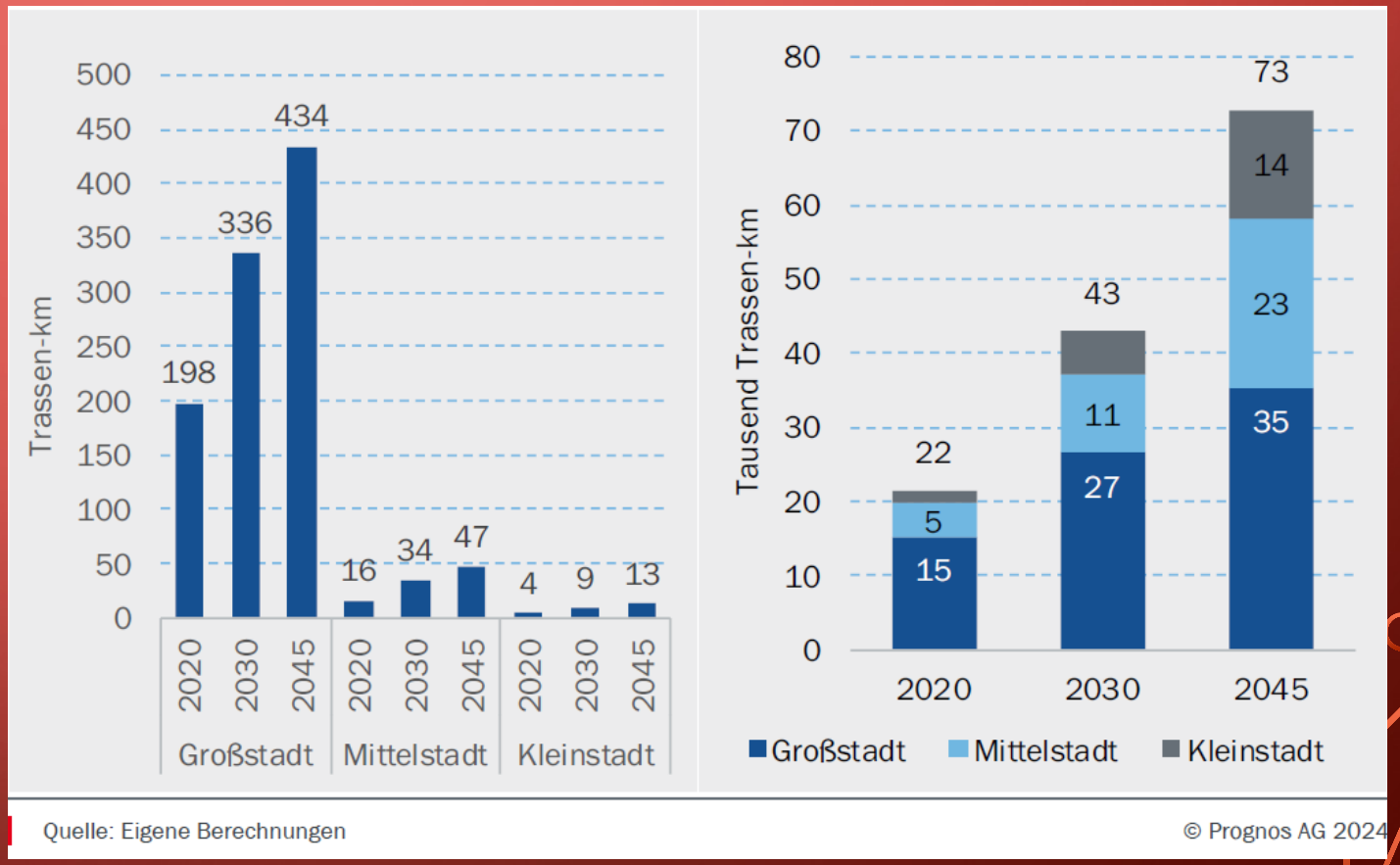
Efterspørgslen efter bæredygtige varmeforsyningsløsninger stiger, ikke kun i storbyer (2-3 gange), men også i mellemstore (4-5 gange) og små byer (6 gange). Her mangler der ofte kapital og knowhow. Et godt marked for nøglefærdige totalløsninger (EE + varmenet inkl. finansiering).

Anteil der Fernwärme am Wärmeverbrauch der Gebäude je Gemeinde			
Großstadt	24%	39%	53%
Mittelstadt	6%	12%	26%
Kleinstadt	2%	5%	12%

MULIGHEDER FOR DANSKE VIRKSOMHEDER I

Der er især stor efterspørgsel efter varmeledninger.

Ledningslængden forventes at stige fra 22.000 km til 43.000 km i 2030 og til 73.000 km i 2045.



Quelle: Eigene Berechnungen

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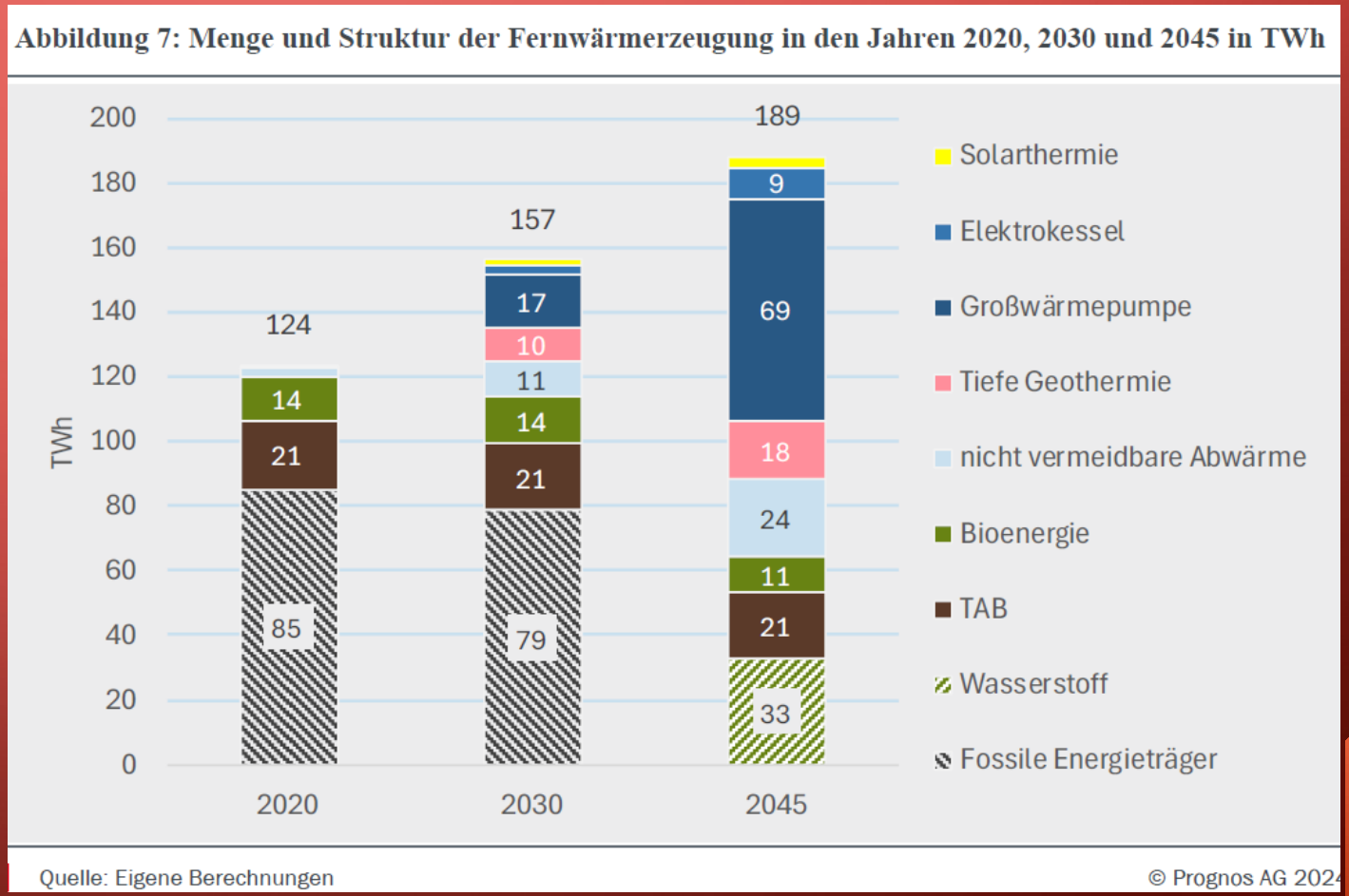
MULIGHEDER FOR DANSKE VIRKSOMHEDER II

Ud over varmenet er der især efterspørgsel efter store varmepumper, biomasse og geotermisk energi.



FORDELE VED DANSKE TEKNOLOGIER

Danske teknologier er kendetegnet ved innovation, høj effektivitet, herunder digitale processer, miljøvenlighed og fleksibilitet.

Disse egenskaber passer perfekt til de tyske krav til en bæredygtig varmeforsyning.

SUCCESEKSEMPLER OG BEDSTE PRAKSIS I DANMARK

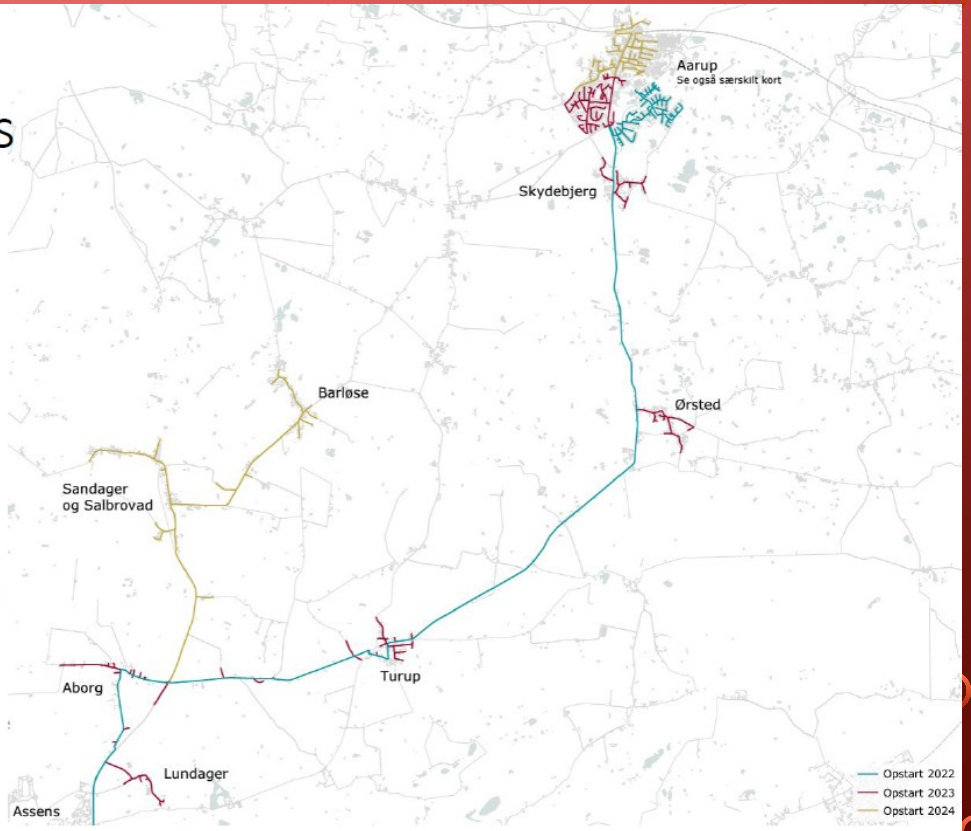
Succesrige danske projekter viser, hvordan innovative tilgange og lokale samarbejder kan føre til succes.

Disse kan formidles gennem delegationsrejser som f.eks. med DBDH bl.a. til Assens: Udbygningen af fjernvarme i landdistrikterne.

Conversion of oil- and natural gas areas

The project

- Start 2022, finish 2026
- +2.000 new customers
- Yearly reduction of 10.000 ton CO_2
- Investment total +400 mio. kr. (54 Mill. €)
  - +20 km transmission-line.
    Investment 180 mio. kr. (24 mill. €)
- Economy new customers
  - Sign-on fee 5.000 kr. (675€)
  - Heat-cost standardhouse 130 m² og 18,1 MWh
    9.495 kr. (1.250€/year)
    Additional transmission-cost 29 kr./m² (3,90€)
    Total 11.313 kr. (1.520 €)



UDFORDRINGER OG HINDRINGER

Mulige udfordringer er forskelle i lovgivning, barrierer for markedsadgang og tilpasning til lokale forhold. Et tæt samarbejde med tyske eller regionale partnere kan overvinde disse hindringer.

Derfor er succesfulde projekter i Tyskland så vigtige.

En digital varmeplanlægning, der kan kobles til projektplanlægningen, kan være en god døråbner!

STRATEGIER FOR MARKEDSADGANG

Vigtige skridt er markedsundersøgelser, opbygning af lokale partnerskaber og deltagelse i fagmesser. Ofte forventes det, at tilbuddene tilpasses tyske standarder og behov.

Alligevel bør der foreslås innovative og frem for alt mere omkostningseffektive løsninger, selvom de i første omgang ikke opfylder de sædvanlige standarder.

FREMTIDSUDSIGTER

Det tyske fjernvarme marked byder på store muligheder på lang sigt. Med bæredygtige teknologier og en proaktiv markedsføring kan danske virksomheder styrke deres position.

Praktiske eksempler, der reducerer omkostningerne, spiller en vigtig rolle:

Hvordan kan fjernvarmerør lægges mere omkostningseffektivt?

Hvordan kan risikoen ved geotermiske undersøgelser reduceres?

Hvordan kan varmelagre integreres omkostningseffektivt i fjernvarmesystemer?

SAMMENFATNING OG AFSLUTNING

Det er ikke nyt for jer, at der er mange eksportmuligheder for danske virksomheder på det tyske fjernvarme marked. Innovation, fleksibilitet og samarbejde er nødvendige forudsætninger. Derudover bør man have modet til at finde ukonventionelle, overraskende løsninger på basis af succesrige projekter.

En fortsættelse af knowhow-overførslen, f.eks. gennem en dansk-tysk fjernvarmeakademi, ville være ønskelig.

Mange tak for jeres opmærksomhed!

KONTAKT

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Kilde af alle brugte tabeller:

Aktualisierung des Gutachtens „Perspektive der Fernwärme - Aus- und Umbau städtischer Fernwärme als Beitrag einer sozial-ökologischen Wärmepolitik“ aus dem Jahr 2020

: https://www.vku.de/presse/pressemitteilungen/studie-zu-waermenetzen-bis-2030-muessen-435-milliarden-euro-in-die-fernwaerme-investiert-werden/