



GREEN HEATING & COOLING

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A market in transition

After reaching record levels in 2023, the Dutch heat pump market declined in 2024 but rebounded in 2025, with a total of 142,000 heat pumps sold: a 15% increase over 2024. 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. Although primarily used for cooling, these devices can serve as partial or full alternatives to traditional gas boilers, potentially accelerating decarbonization readiness across Dutch households.

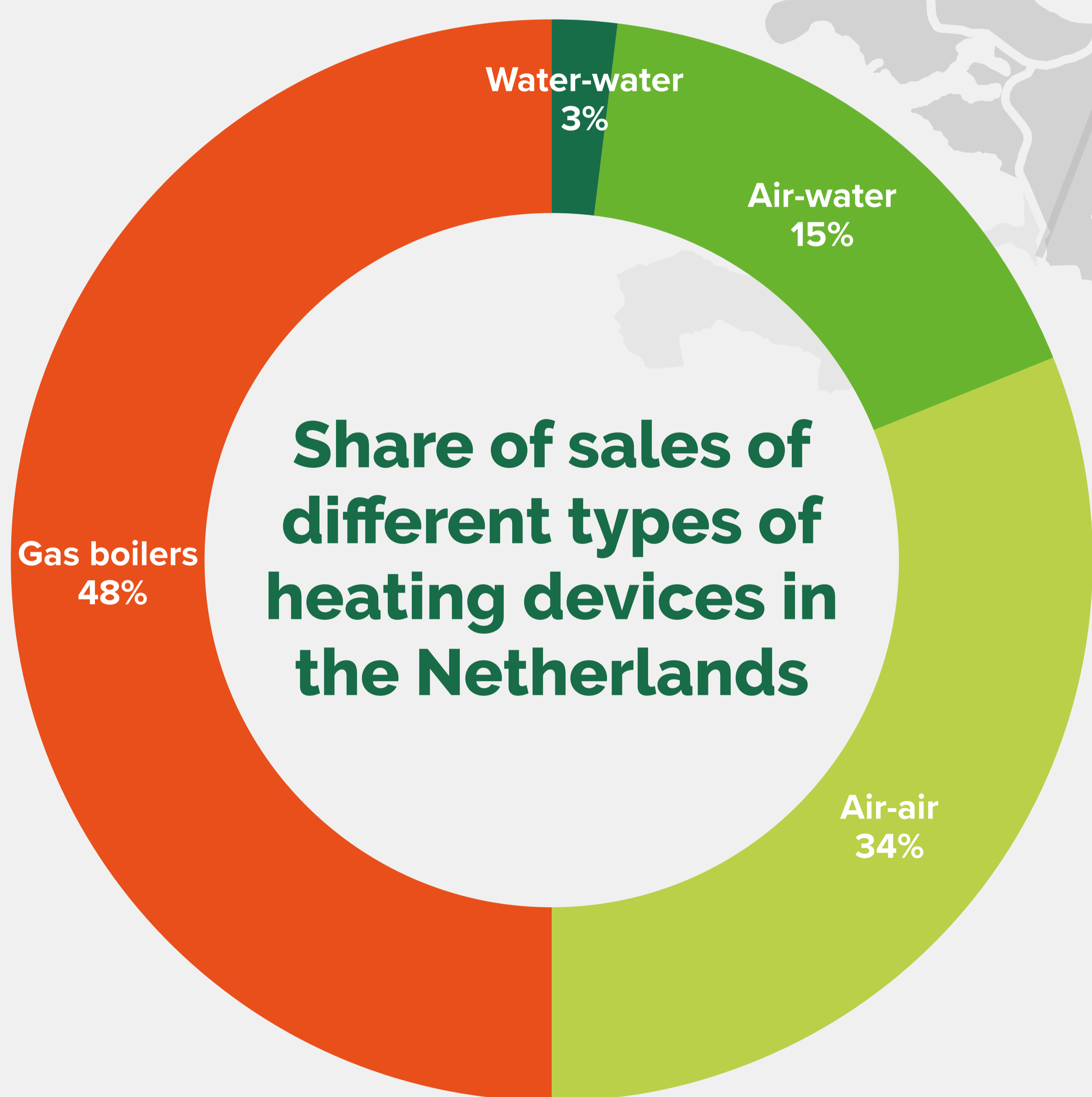
In 2025, residential heat pump sales increased by **14.5%** compared to 2023, reaching a total of 134 thousand units sold.

Amsterdam

By 2025, **31%** of Dutch households had installed some type of heat pump.

Projections indicate that around 485 thousand hybrid heat pumps will be installed by 2030, in addition to more than **1 million** all-electric heat pumps.

There are currently approximately 2.2 million air conditioners installed in the Netherlands, a figure expected to rise to **2.4 million** by 2026. A significant share of these systems is actively used for heating, and in some cases, they even serve as the primary source of heat.



The future of heat pumps in the Netherlands

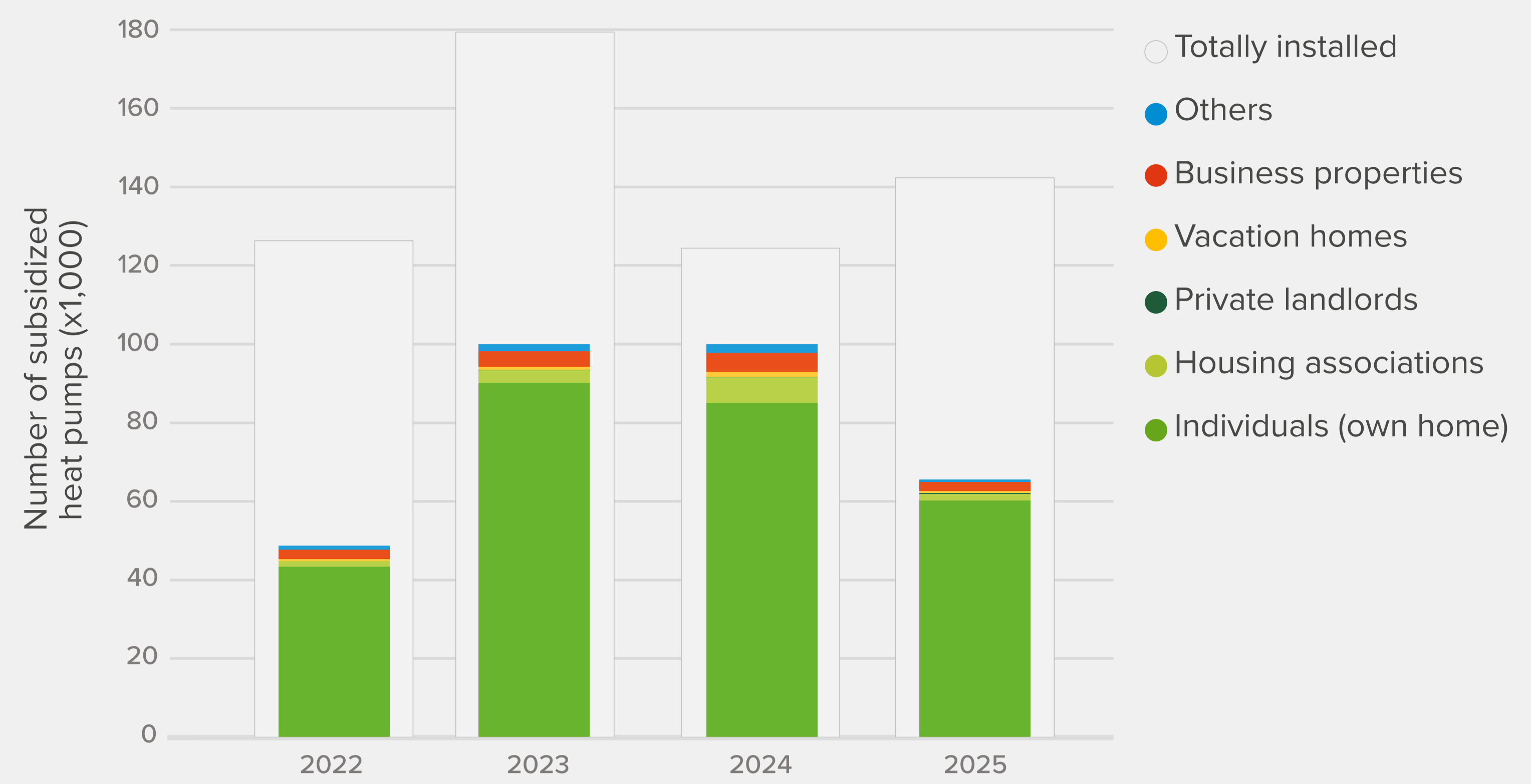
The heat pump market in the Netherlands grew in 2025, with 142,000 units sold and total installed capacity reaching 8 GW, despite fluctuations caused by energy prices and changes in government policy. Although projections for 2026 vary considerably due to external uncertainties and grid congestion, the long-term trend remains positive, with the system evolving from a standalone product to an essential and flexible component of the country's energy infrastructure. Notably, the inclusion of air conditioning systems used for heating reveals that the energy transition is more advanced than anticipated, covering about 31% of Dutch households, while the sector's internal dynamics show a growing preference for all-electric systems over hybrid ones.



Hrvoje Medarac, PhD
Head of Dutch New Energy Research

Subsidies are key to heat pump adoption!

- In 2025, almost 50% of all newly installed heat pumps received ISDE support, where 92% of these installations came from private homeowners.
- According to RVO, around 123,000 heat pumps were approved for ISDE subsidies in 2025, with 94% of these grants allocated to air-to-water heat pumps.

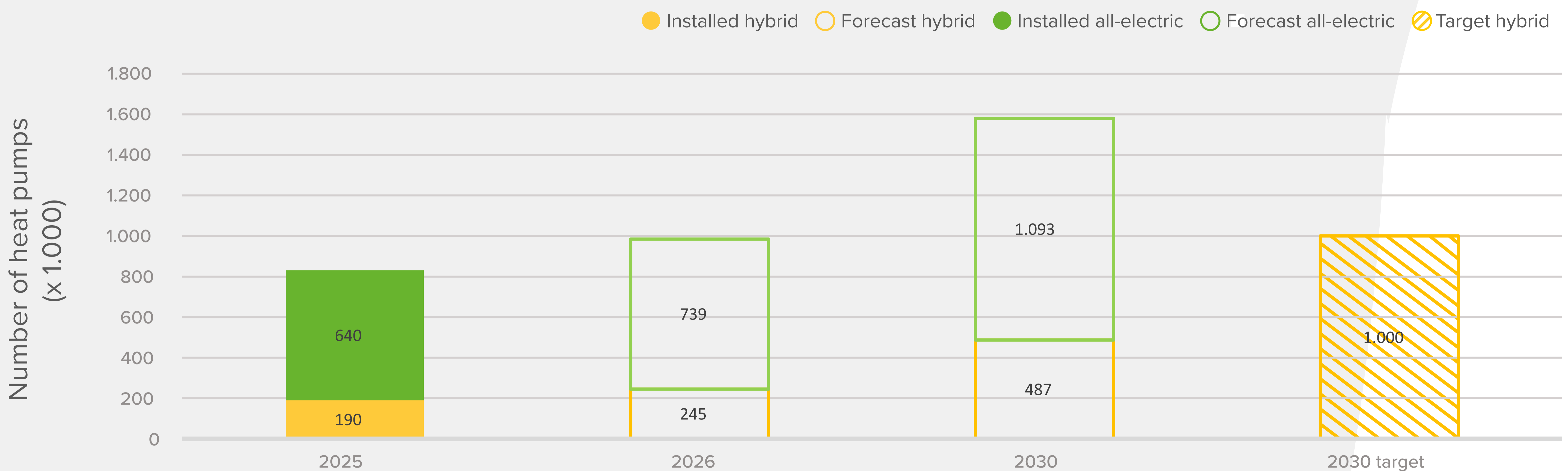


Heat Pumps and Air Conditioners Adoption in Dutch Households

By 2025, 31% of Dutch households had installed some form of heat pump, marking significant progress in the transition away from gas boilers. This includes 2% with water-to-water systems, 8% with air-to-water heat pumps, and 21% with air-to-air units, mainly air conditioners with heating capability. In the residential sector, approximately 270 thousand air conditioning units were sold in 2025. Sales of air conditioning systems are currently 2.1 times higher than those of other heat pump technologies, such as air-to-water and water-to-water systems. While these figures exclude larger-scale heat pumps used in apartment complexes and utility buildings, they clearly indicate a strong adoption trend, following a pattern similar to the uptake of solar panels. Looking ahead, the medium-term outlook for the residential heat pump market will depend heavily on policy developments, energy prices, grid capacity, consumer confidence, and geopolitical conditions.

Forecast

By the end of 2030, projections show a cumulative total of approximately 487,000 hybrid heat pumps and 1,1 million all-electric systems. This brings the total number of heat pumps in Dutch households to around 1,58 million. Under current policy assumptions, this indicates that the target of 1 million hybrid heat pumps is unlikely to be met.



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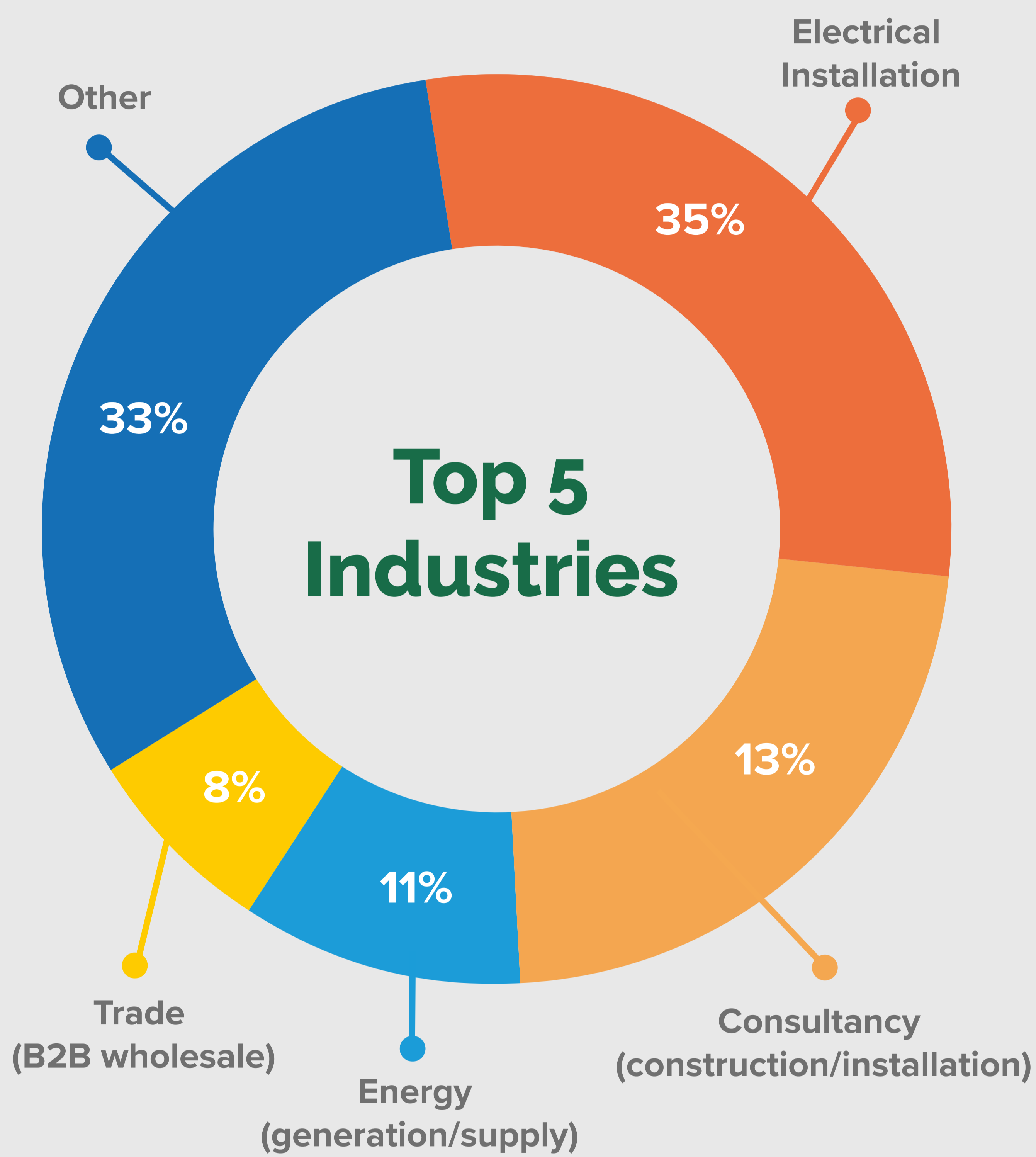
Visitor profile of 2025

Visitor analysis

Visitor analysis	Total
Total exhibitors	77
Total visitors	2.881

Top 3 country of origin

The Netherlands	93%
Belgium	5%
Germany	2%

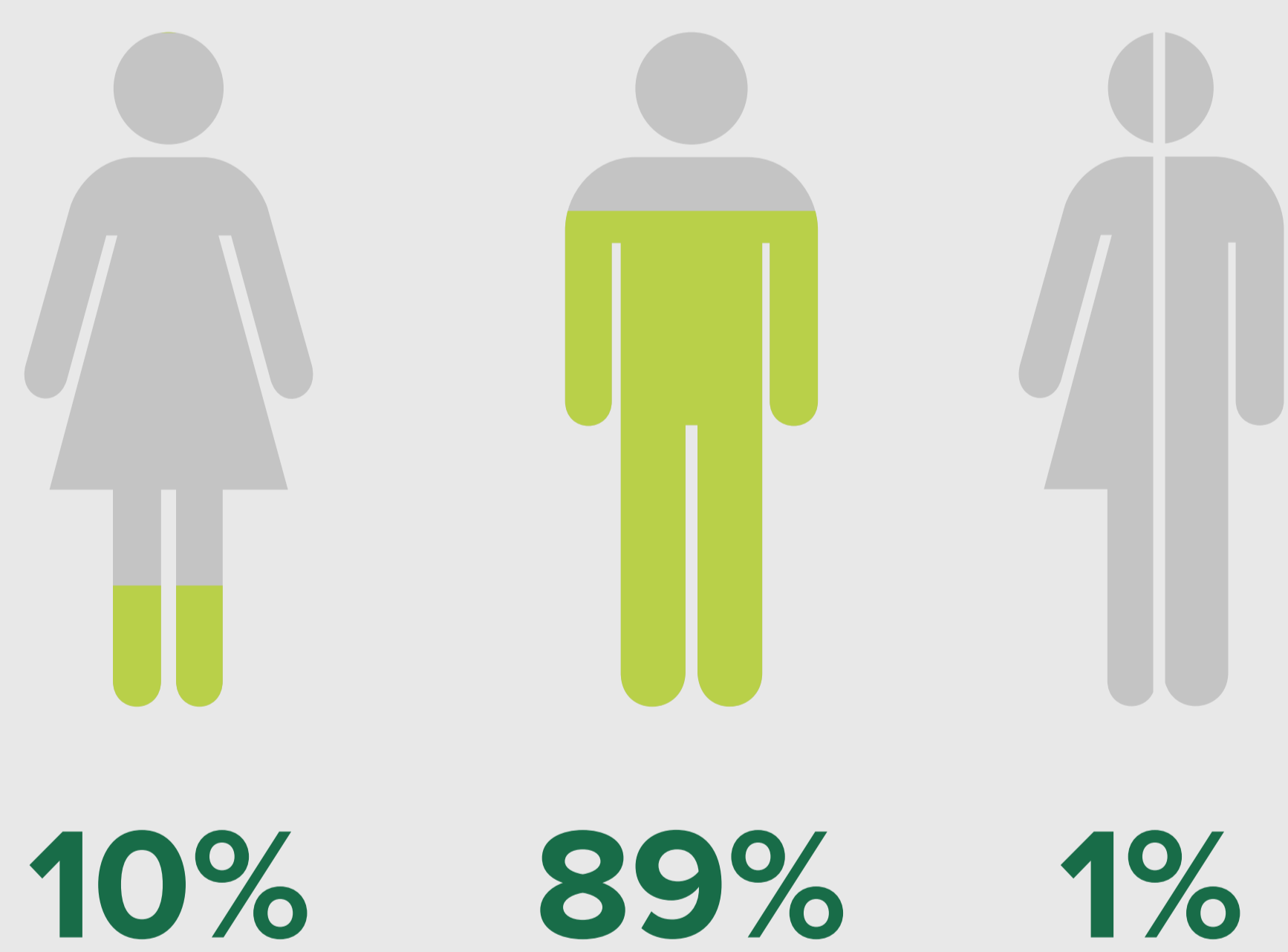


Our visitors are decision makers

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 Green Heating & cooling brings together the people who shape the future of our sector.

Top 5 functions

1. Senior management	36%
2. Business owner	23%
3. Other	21%
4. Technical employee	12%
5. Freelance / Independent contractor	8%



Gender in the industry

Currently, 89% of visitors 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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**Reporting the shift,
connecting the
industry.**

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