SCOTTS INTERNATIONAL

HVAC Market - Global Outlook & Forecast 2023-2028

Market Report | 2023-02-02 | 344 pages | Arizton Advisory & Intelligence

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Report description:

The global HVAC market size is expected to grow at a CAGR of 5.43% from 2022-2028.

The global market is undergoing tremendous modifications due to the increasing integration of the Internet of Things (IoT) technology with HVAC products, making them innovative and accessible. The emphasis on connecting several sensors within building ecosystems, including HVAC, has grown for achieving energy efficiency.

In 2022, the major economies in APAC, including China, Japan, and India, witnessed increasing commercial construction activities due to an expanding number of companies in various sectors setting up their offices in distinct regions to capture the target and potential customer base. In the APAC region, the increasing demand for energy-efficient HVAC systems and stringent regulations for the use of explosion-proof HVAC equipment is boosting the adoption across industries. It will offer enormous growth opportunities in the HVAC market. Further, Middle East countries are witnessing drastic climate changes. Rising temperatures and heat waves increased the demand for HVAC systems in commercial and residential buildings to control indoor climate conditions, further propelling the HVAC market growth. Along with providing residents with comfort, filtering can also improve indoor air quality. Hence these factors propel sales growth across the Middle East & Africa region during the forecast period.

MARKET TRENDS & DRIVERS

Replacement of Existing Equipment with Energy Efficient Products

In 2020, the commercial sector experienced the steepest decline due to the hard-hit hotel & motel industry and sports & convention centers. The commercial sector has witnessed constant growth since 2021, with the recovering economy. Energy-efficient HVAC technologies for residential and commercial buildings have the potential to provide environmental and economic benefits. They are optimizing energy-efficient HVAC technologies, and proper installation planning help to reach energy-saving potential by up to 40%. Therefore, replacing existing equipment with energy-efficient HVAC technologies will boost the growth rate of the HVAC market in the future.

Rising Construction Industry

In the long run, the construction industry globally is expected to experience steady growth due to low-interest rates in a few European countries and stable economic growth. The construction of hotels, amusement parks, private & government offices, and sports & convention centers is growing, thereby supporting the HVAC market in the construction sector.
The global HVAC market is highly dependent on the construction industry for revenue through new installations, whether residential or commercial. The refurbishment of buildings provides massive revenue to the HVAC industry. The industry witnessed an increased inflow of public and private investments, mainly in countries, such as Spain, Cyprus, Italy, and the Netherlands. In 2022, The Construction Intelligence Center (CIC) revised the growth forecast for the European construction industry. This was because of the improved performance of some significant developed city markets and a brighter outlook for the European economy.

SEGMENTATION ANALYSIS

INSIGHTS BY EQUIPMENT TYPE

HVAC commonly refers to heating, ventilation, cooling, collective heating, and cooling technologies used at commercial, residential, industrial, and public utility buildings. The heating equipment segment in the global HVAC market was valued at USD 91.06 billion in 2022 and is expected to reach USD 123.85 billion by 2028. The heating equipment industry is characterized by intense competition. The heating equipment is generally fragmented. Hence, the industry is characterized by many local/domestic vendors.
The air conditioning industry is characterized by the presence of many domestic and multinational vendors, and the industry is seasonal and characterized by modern technology. Air-conditioners are in the fastest-growing segment and have a vast addressable industry in developed and developing economies. APAC, Europe, and North America are expected to witness rapid growth in Air-conditioners by value because of higher construction activity and the demand for renovation activities.

Segmentation by Equipment

- Heating
  - Heat Pump
  - Boiler Units
  - Furnaces
  - Others
- Air Conditioning
  - RAC
  - CAC
  - Chillers
  - Heat Exchangers
  - Others
- Ventilation
  - Air Handling Units
  - Air filters
  - Humidifiers & Dehumidifiers
  - Fan Coil Units
  - Others

INSIGHTS BY END-USER

The global residential sector HVAC market was valued at USD 135.63 billion in 2022 and is growing at a CAGR of 4.99% during the forecast period. The demand from the residential sector grew by over 5.63% due to an increase in the refurbishment of houses and stable residential new construction activities. The shift in housing preferences to large homes and the low-interest rates resulted in the increased demand for home improvements and new constructions. Many construction projects in the US provide the highest revenue to HVAC systems, and the demand is expected to increase during the forecast period. In Europe, climatic variations led to high demand for all product categories of HVAC in 2022. The demand for HVAC equipment in the Nordics varies drastically from mainland Europe. Construction activities in the region are highly concentrated in Western Europe, with a high demand for replacement.

Segmentation by End-user

- Residential
- Commercial
  - Office Spaces
  - Airport & Public Utilities
  - Hospitality
  - Hospitals
  - Industrial & Others

GEOGRAPHICAL ANALYSIS

- The APAC region holds the most extensive global HVAC market share. It is expected to witness a CAGR of 6.44% during the forecast period, buoyed by spiking demand from the residential sector, commercial offices, and buildings. The major economies in APAC, including China, Japan, and India, are witnessing increasing commercial construction activities due to an expanding number of companies in various sectors setting up their offices in distinct regions to capture the target and potential customer base. In 2022, China accounted for the largest revenue share of 43.73% of the APAC HVAC system market. It is estimated to witness an incremental growth of USD 21.81 billion during the forecast period. The China market is witnessing a spurt in multiple real estate projects and public-private investments in various residential, industrial, and commercial development zones because of the boom in urbanization.
- The Europe HVAC Market was valued at USD 61.2 billion in 2022 and is expected to reach USD 86.49 billion by 2028, registering a CAGR of 5.92 % during the forecast period. This growth is mainly driven by Western European, the two largest economies. France and Germany account for one-third of the market and experienced annual growth rates of 4.72% & 5.93%, respectively, in the forecast period. Major factors spiking the sales rate for HVAC equipment in Europe are rising average construction spending, increasing retail building construction projects, rising government spending on sustainable building development, industrial developments, rapid urbanization, changing climatic conditions, and growth in disposable income across European countries.

Segmentation by Geography

- APAC
  - China
  - India
  - Japan
  - Australia
- North America
  - US

o Canada
- Europe
o Western Europe
- Germany
- France
- UK
- Italy
- Netherlands
o Nordic
- Norway
- Denmark
- Sweden
- Others
o Central & Eastern Europe
- Russia
- Poland & Austria
- Other CEE Countries
o Latin America
- Brazil
- Mexico
- Argentina
o Middle East & Africa
- Saudi Arabia
- UAE
- South Africa

COMPETITIVE LANDSCAPE

Systemair, Johnson Controls, Zehnder, Ostberg, and Aldes are some of the key players in the global HVAC market. Other players operating in the global HVAC market include LG, Panasonic, Carrier, Regal, and others. The prominent vendors focus on developing advanced HVAC and investing in R&D initiatives to enlarge their product line and gain a competitive advantage in the market.

Other attractive prospects in the form of IoT are expected to change the industry's working as they connect all components and create an environment where the device operation can be managed efficiently using smart management solutions. Moreover, because of a highly competitive industry, R&D investments in the HVAC market are limited and have substantial investments, mainly from large vendors. Moreover, the short time-to-market and narrow acceptance of new technologies add to market challenges for HVAC vendors. R&D investments are more focused on cost reduction of the production process and improvement of the existing product technology for value addition than developing new products. As a result, a lot of mergers & acquisitions are taking place to develop and enhance the offerings and attributes to survive in the global HVAC market.

Key Company Profiles

- Systemair
- Johnson Controls
- Zehnder
- Ostberg

- Aldes
- Bosch
- Daikin
- Samsung
- Mitsubishi Electric

Other Prominent Vendors

- LG
- Panasonic
- Carrier
- Midea
- Regal
- Raytheon Technologies
- Honeywell
- Flakt Group
- Beijer Ref
- Flexit
- Grundfos
- Swegon
- VTS
- Nuaire
- Nortek
- Alfa Laval
- Hitachi
- Lu-Ve
- Vent-Axia
- Rosenberg
- S & P
- WOLF
- CIAT
- AL-KO
- DynAIR
- Danfoss
- Lennox
- Backer Springfield
- Dunham-Bush
- TCL
- TROX
- Vaillant Group
- Ingersoll Rand
- Camfil

KEY QUESTIONS ANSWERED:

1. How big is the HVAC market?
2. What is the growth rate of the global HVAC market?

3. What are the significant trends in the global HVAC market?
4. Who are the key players in the global HVAC market?
5. Which region holds the most prominent global HVAC market share?
6. What is the market size of the global Residential HVAC market?

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HVAC Market - Global Outlook & Forecast 2023-2028

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