

## **HVAC Maintenance and Services Market - Global Outlook & Forecast 2024-2029**

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### **Report description:**

The global HVAC maintenance and services market is expected to grow at a CAGR of 5.79% from 2023-2029.

### **MARKET TRENDS & DRIVERS**

#### **Rise in Disposable Income**

The high disposable income of most of the population worldwide is attributable to the high literacy and employment rates. Thus, such factors contribute to an increasing consumer inclination toward premium and smart products available in the market. Despite premium pricing, the demand for the construction of swimming pools in the residential and commercial sectors is rising in developed countries such as the US. The surge in demand for construction would propel the demand for HVAC maintenance services. The considerably high demand for pool heat pumps worldwide can be attributed to the substantial disposable incomes of working individuals.

#### **Favorable Government Policies and Incentives**

The favorable government policies across the countries that support using renewable energy sources and prevent the emission of greenhouse gases into the atmosphere are eventually driving the HVAC maintenance and services market. For instance, the Chinese government strives to promote the use of heat pumps nationwide. It provides subsidies for installation that can cover up to 90% of the total unit cost, especially where heating with coal fire is popular. The country has also been trying to take a sustainable approach, making it more significant to reduce the emission of hazardous gases into the environment. The China Heat Pump Alliance (CHPA) is the standard body for the HVAC market in the country.

### **INDUSTRY RESTRAINTS**

#### **High Installation and Upfront Costs**

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Despite the benefits associated with HVAC in terms of sustainable contribution to the environment, the high initial and upfront costs are hindering their adoption. Such factors can be a significant challenge for the HVAC maintenance and services market, especially in the growing economies and price-sensitive markets of APAC and Latin America, where cost is a major influencing factor for purchase. According to estimates, the average installation costs for an HVAC with pool plumbing might range between USD 3,600 and USD 6,500, whereas the labor costs might range between USD 500 and USD 1,000. These prices are often quite high for middle-income consumers who form the major target segment. Although there is evidence of HVAC generating low operational costs over time when compared to conventional gas and solar heaters, the high installation cost is a burden for vendors in the market.

## SEGMENTATION INSIGHTS

### INSIGHTS BY EQUIPMENT

The HVAC maintenance and services market by equipment is segmented into heating, air conditioning, and ventilation. The heating segment dominated the global market share in 2023. The heating equipment market is characterized by many vendors producing both traditional and modern heating equipment. The market has several tools, each with a specific functional and distinct technology. Some include heating pumps, furnaces, boiler units, and other heating equipment. Heating pumps have been one of the most critical HVAC systems. They are mainly used in cold regions as their primary function is heating. The demand for heat pumps mainly results from efficiency since their output is four times the energy consumed. Heat pumps are a steady revenue generator for the industry and have witnessed high growth and constant innovation. The key factors favoring the heat pump demand include increased energy efficiency, low cost & payback period, and high reliability.

#### Segmentation by Equipment Type

- Heating
- Air Conditioning
- Ventilation

### INSIGHTS BY SERVICE MODEL

The maintenance & repair service model segment holds the most prominent share of the HVAC maintenance and services market 2023. HVAC maintenance, such as changing belts and filters, greasing bearings, and adjusting equipment due to wear and tear, is done periodically to keep equipment running correctly and efficiently. One convincing rationale for timely HVAC preventive maintenance is the potential for substantial savings on user utility bills. When an HVAC unit operates at peak efficiency, it doesn't overexert itself, which helps to reduce energy consumption. Moreover, the U.S. Department of Energy suggests that this efficiency boost can translate into significant savings, potentially slashing end-user energy costs by as much as 30%. Embracing HVAC preventative maintenance is not only for efficiency but also helps foster healthier indoor air quality. The U.S. Environmental Protection Agency (EPA) mentioned indoor air can be two to five times more polluted than outdoor air. Proper HVAC maintenance can help remove pollutants and allergens, significantly improving indoor air quality. Such factors are projected to support the segmental growth during the forecast period.

#### Segmentation by Service Model

- Maintenance & Repair
- Installation
- Replacement

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## INSIGHTS BY END USERS

The global HVAC maintenance and services market by end-users is segmented into residential, commercial, and others. The residential end-user segment has emerged as the largest HVAC maintenance and services market. The rise in disposable income, growing urbanization, willingness for a sophisticated lifestyle, and expansion of distribution networks to cater to domestic aftersales services have led to the segment's dominance. With immense scope for commercial applications, the segment is booming in established markets of APAC, Europe, and the United States. Further, developing affordable and flexible HVAC that matches the complex and dynamic infrastructure and helps lower utility bills contributes to the segment's growth. Institutions such as schools, colleges, sports complexes, and water parks also use renewable technologies to signify or differentiate themselves from society by showcasing their environmental commitment by reducing their carbon footprint. Restaurants, hotels, spas, and recreation centers are the major end-users in the segment, which poses a strong growth prospect for the next five years. It is further accelerated by the growth in tourism, leisure activities, demographic factors, lifestyle modifications, and supportive incentives from the government to promote business activities.

### Segmentation by End Users

- Residential
- Commercial
- Others

## GEOGRAPHICAL ANALYSIS

APAC holds the most significant share of the global HVAC maintenance and services market 2023. The increasing demand for energy-efficient HVAC systems and severe regulations for using explosion-proof HVAC equipment is growing in the APAC region. Also, the adoption of cleanrooms across industries will offer enormous growth opportunities. Moreover, the frequency of natural disasters in the Asia Pacific region is expected to remain high. With population relocation to coastal cities, a specific disordered urbanization process is the primary factor leading to the vulnerable climate change risk in APAC countries. Therefore, the fluctuating climatic conditions propel the demand for the dynamic nature of HVAC maintenance & service in APAC countries in the forecast period.

### Segmentation by Geography

- APAC
  - o□China
  - o□Japan
  - o□India
  - o□Australia
  - o□South Korea
- Europe
  - o□Germany
  - o□France
  - o□Russia
  - o□The U.K.
  - o□Norway
  - o□Denmark

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- o Italy
- o Poland
- o Spain
- North America
- o The U.S.
- o Canada
- Latin America
- o Brazil
- o Mexico
- o Argentina
- Middle East & Africa
- o Saudi Arabia
- o UAE
- o South Africa

## COMPETITIVE LANDSCAPE

Global players in the HVAC maintenance and services market, like Systemair Manufacturing, Johnson Controls, Zehnder, and Ostberg, are trying to expand their markets through profitable partnerships and merger strategies. In contrast, the domestic vendors in the HVAC maintenance and services industry are capitalizing on the product portfolio that best suits domestic needs and wants. However, being a technology-oriented product, the scope of differentiation lies with sophistication and deployment of advanced features like energy efficiency, COP, eco-friendly refrigerant, installation costs, geographical climate, services analysis, and much more, through which the product can stay away from the competitive environment. With the recent advancements in engineering and technological features, the changing dynamics of the HVAC industry demand highly effective heating equipment for universal applications.

### Key Company Profiles

- Systemair
- Johnson Controls
- Robert Bosch
- Zehnder
- Ostberg
- Aldes
- Daikin
- Samsung
- Mitsubishi Electric
- Rheem Manufacturing Company
- AquaCal
- Pentair

### Other Prominent Vendors

- LG
- Panasonic
- Carrier
- MIDEA

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- []Nuaire
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- []Alfa Laval
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- []Dynair
- []Danfoss
- []Lennox
- []Backer Springfield
- []Dunhambush
- []TCL
- []Trox
- []Vaillant Group
- []Ingersoll Rand
- []Camfil

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the global HVAC maintenance and services market?
- 2.[]What is the growth rate of the global HVAC maintenance and services market?
- 3.[]Which region dominates the global HVAC maintenance and services market share?
- 4.[]What are the significant HVAC maintenance and services industry trends?
- 5.[]Who are the key players in the global HVAC maintenance and services market?

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