

Air Handling Units (AHU) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Air Handling Units Market size is estimated at USD 15.99 billion in 2025, and is expected to reach USD 21.47 billion by 2030, at a CAGR of 6.08% during the forecast period (2025-2030).

Key Highlights

- Air handling units (AHUs) are commonly used in large facilities visited by many people, such as shopping malls, as such facilities frequented by people are subjected to strict regulations regarding the exhaustion of carbon dioxide and air cleanliness. A large facility must let adequate amounts of air into the building and use multiple blower fans and other equipment to circulate the air. As the air handling units deliver outside air into the rooms, they can significantly reduce the number of required blower fans.
- The rapid rise in industrialization and urbanization around the world is one of the primary factors driving market growth. The significant increase in the construction of different commercial and residential buildings worldwide creates considerable demand for Air Handling Units as a space cooling and heating system. For instance, as per CIARB, the volume of construction output is anticipated to grow by about 85 percent globally to USD 15.5 trillion by 2030.
- According to the European Commission, buildings in the EU region are responsible for around 36 percent of GHG emissions and 40 percent of energy consumption, mainly from construction, usage, renovation, and demolition. HVAC systems account for a considerable share of energy usage in these buildings. Hence, the demand for energy-efficient HVAC systems, including air handling units, is anticipated to gain traction during the forecast period.
- Furthermore, the HVAC equipment market, including air handler units, is highly dependent on sectors such as construction, government regulations, and new initiatives by the governments of various regions to boost the infrastructure and industrial and manufacturing sectors. Any fluctuations in the growth in the commercial and industrial sectors are bound to impact the demand for this equipment directly.
- Additionally, macroeconomic factors such as geo-political issues and the recent economic instability witnessed in the North

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

American and European regions are also anticipated to influence the studied market's growth. For instance, the growing energy prices, owing to the Russia-Ukraine war, are anticipated to slow down the demand for air handling units in Europe as energy consumption by these devices is higher.

Air Handling Units (AHU) Market Trends

Commercial Segment to Occupy a Significant Share

- Air Handling Units are used in any commercial structure, such as restaurants, data centers, hospitals, schools, hotels, and office buildings, to provide inhabitants with a comfortable environment. For instance, an air handling unit (AHU) is used in medium- and large-sized industrial or commercial buildings to condition and transport fresh air throughout the structure. AHUs are a component of the bigger HVAC system; they draw fresh outdoor air in, clean and condition it, and then heat or cool it as necessary.
- Air handler units can be utilized for either a single space or an entire building due to their wide range of size and functionality. They are frequently located in the basement or on the roof of commercial-sized buildings. The air handler unit can then be allocated to particular regions of a building to deliver heating or cooling as needed.
- The increasing demand for environmentally friendly and energy-efficient HVAC systems is credited with driving the segment's expansion. The need for energy-efficient and cost-effective HVAC solutions is driving the increased demand for air handling systems. Air handling units provide several advantages over other types of HVAC systems, including higher energy efficiency, cheaper running costs, and better indoor air quality.
- The commercial sector consumes a large portion of North America's overall energy consumption. There are approximately 6 million buildings in the business sector of the United States, totaling 97 billion square feet of floor space, according to the environmental services firm Carbon Reform. Additionally, mechanical heating and cooling systems are used in some capacity on more than 90 percent of the total commercial floor space. Additionally, it is anticipated that the expanding construction sector will drive the market and contribute to the overall energy requirements for commercial buildings.
- Considering a large commercial sector, the sector is also among the leading consumer of electricity in the United States; according to EIA, in 2022, about 4.9 quadrillion British thermal units of primary energy was consumed by the commercial sector in the United States. Hence, the growing energy consumption is anticipated to drive the demand for energy-efficient air handling units in the country during the forecast period.

Asia-Pacific is Expected to Register the Fastest Growth

- The air handling unit (AHU) market is anticipated to grow fastest in the Asia-Pacific region during the projected period, primarily due to the expanding infrastructure and building project investments and increased demand for energy-efficient technologies in the area. This market is anticipated to rise throughout the projected period due to technological developments such as intelligent AHUs.
- Countries like India and China are fast emerging as the pharmaceutical manufacturing hub in the Asia Pacific region. In the pharmaceutical business, air handling units are primarily used to maintain a regulated atmosphere for medicines and other items with high sanitation standards to prevent contamination, among other things. Due to the development of new chemical and pharmaceutical facilities like the Yeosu Mononitrobenzene Manufacturing Plant and Tuas Biomedical Park New Vaccine Production Facility, the market for air handling systems is anticipated to grow in the region.
- The fast-increasing industrial sector in Asia is one of the primary causes responsible for the most significant share. It is also anticipated that growing urbanization and commercialization in this region's developing nations, including India, Japan, China, and South Korea, will raise demand for air handling systems. Additionally, the rising disposable income and changing lifestyle also

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

drive demand for pleasant living spaces, which is a significant element driving the market's direction.

- The Asia-Pacific region is crucial to global efforts to attain net zero and a transition to green energy. The "green" trend is exploding throughout Asia-Pacific due to numerous governments establishing national or regional initiatives and programs to promote energy conservation efforts. The government's initiatives provide enormous prospects for technologists in the green and energy efficiency sectors of HVAC and building automation systems.
- Moreover, environmental laws are becoming more prevalent in Asia-Pacific, including the Australian Minimum Energy Performance Standards (MEPS), China's Green Building Evaluation Label (GBEL), and India's Bureau of Energy Efficiency Standards and Labeling Program (BEE Labeling Program), among others. As a result, the HVAC industry in this area is turning toward environmentally friendly AHUs with low Global Warming Potential (GWP) and energy-efficient technology.

Air Handling Units (AHU) Market Overview

The competitive rivalry in the AHU market is growing, as the market comprises many large vendors that command a prominent market share besides having access to well-established distribution networks. However, the growing demand is encouraging new players to enter the market, shifting its landscape towards a fragmented stage. Many manufacturers are focusing on energy efficiency as one of the key concerns. Moreover, major vendors in the market studied are involved in both M&A activities and partnerships to gain higher penetration and market share. Some key market players include Daikin Industries, Carrier Corporation, TRANE Inc., and Johnson Controls, among others.

In May 2023, Colmac Coil Manufacturing, Inc. launched its latest HygenAir A+H Hygienic Air Handler. According to the company, the air handler is designed to improve hygiene inside processing room environments wherein sanitation is critical and is custom-engineered to help food processors increase worker safety and meet the strict requirements of the USDA by maintaining high quality.

In May 2023, Edgetech Air Systems Pvt. Ltd., a provider of advanced air handling systems used in central air conditioning, installed Smart Air Handling Units in India's Central Vista Project. According to the company, the installed air handlers are equipped with advanced analytics and monitoring and analytics systems to provide real-time operational intelligence and contribute to energy efficiency.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Attractiveness - Porter's Five Forces Analysis

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2.1 Bargaining Power of Suppliers
- 4.2.2 Bargaining Power of Buyers
- 4.2.3 Threat of New Entrants
- 4.2.4 Threat of Substitutes
- 4.2.5 Intensity of Competitive Rivalry
- 4.3 Industry Value Chain Analysis
- 4.4 Impact of Macro Trends on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Rising Population and Urbanization is Driving Market Demand
 - 5.1.2 Increasing Demand for Energy-efficient HVAC Systems
- 5.2 Market Challenges
 - 5.2.1 Dependence on Macroeconomic Conditions
 - 5.2.2 Growing Competition to Limit Margins

6 MARKET SEGMENTATION

- 6.1 By Type
 - 6.1.1 Packaged
 - 6.1.2 Modular
 - 6.1.3 Custom
 - 6.1.4 Other Types
- 6.2 By End User
 - 6.2.1 Residential
 - 6.2.2 Commercial
 - 6.2.3 Industrial
- 6.3 By Geography***
 - 6.3.1 North America
 - 6.3.2 Europe
 - 6.3.3 Asia
 - 6.3.4 Australia and New Zealand
 - 6.3.5 Latin America
 - 6.3.6 Middle East and Africa

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles*
 - 7.1.1 Daikin Industries Ltd.
 - 7.1.2 Carrier Corporation
 - 7.1.3 TRANE Inc. (Trane Technologies PLC)
 - 7.1.4 Lennox International Inc.
 - 7.1.5 Johnson Controls International PLC
 - 7.1.6 Systemair AB
 - 7.1.7 TROX GmbH
 - 7.1.8 Swegon Group AB (Investment AB Latour)
 - 7.1.9 Hitachi Ltd
 - 7.1.10 Blue Star Limited

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Air Handling Units (AHU) - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

