

Europe HVAC Controls - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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

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Report description:

The Europe HVAC Controls Market is expected to register a CAGR of 7.10% during the forecast period.

Key Highlights

- The market is driven by the growing demand for remote technology, IoT usage, smart homes complemented by the growth of HVAC equipment adoption. This could be further attributed to the increase in new households, rising average construction spending, rising government spending on sustainable building development, rapid urbanization, and growth in disposable income across several European economies.
- The increased focus on smart technologies across Europe is driving the need for HVAC control systems. The control systems help optimize the management of air handling units and chiller units in domestic, commercial, and industrial settings. The need to control temperature settings according to the external atmosphere and the current occupancy is furthering the growth of the studied market.
- The HVAC control systems help reduce energy consumption costs, allowing automation of the HVAC equipment and saving the operational cost of companies. The higher efficiency level could be achieved through wireless controls and sensors in residential, commercial, and industrial settings and contributes to the broader adoption of HVAC control systems.
- The surging demand for improved energy-efficient control systems that have a low impact on the environment positively impacts the market's growth. This is favored by government legislation that stresses lowering the environmental impact of HVAC systems and could be achieved by using the HVAC controls.
- The adoption of the control systems for HVAC equipment is marked with stunted awareness amongst industry players. Alongside stipulated budget for investing in HVAC control systems, the inconsistency in awareness could create uncertainties for the acceptance of HVAC control systems.
- The COVID 19 pandemic has led to an unprecedented impact on the supply chain of industries across Europe, and the studied

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market was also impacted by the same. Although, the adoption of IoT-enabled devices and remote working due to the pandemic is expected to help in the revival of the market.

- Furthermore, the pandemic raised concerns of the spread of the Coronavirus through HVAC systems which were negated by various organizations. In March 2020, REHVA, the European Federation of HVAC associations, concluded that air conditioning, humidification, and duct cleaning have no considerable effect on the transmission of COVID-19. They insisted that air conditioning and humidification have no possible impact on the transmission of the virus.

Europe HVAC Controls Market Trends

Residential End User Segment is Expected to Grow at a Significant Rate Over the Forecast Period

- The residential segment is anticipated to witness significant demand for HVAC control systems, owing to the evolving market scenario across developing European countries.
- The adoption of HVAC control systems in residential settings is driven by increased awareness of energy efficiency and thereby protecting the environment. The adoption of HVAC equipment by residences in Europe is driving the ancillary demand for control systems.
- Furthermore, the control systems contribute largely to reducing electricity bills. Progressive government legislation in the form of tax credits formulated by the European Union to increase energy efficiency and the focus on cost-saving systems contributes to the growth of the market.
- With people being largely restricted to homes during the pandemic and the commercialization of HVAC control systems for residential use, the studied market is expected to register high demand in the envisaged period. The compulsion to stay at home, facilitated by the increase in disposable income has led to installing HVAC control systems in residential settings.

Germany to hold Significant Market Share Over the Forecast Period

- Germany is expected to hold significant market share in the studied market over the forecast period. The adoption of HVAC control systems is driven by the need to control the temperature indoors. The country's annual temperature hovers around 10 degrees Celsius, creating a demand for air conditioning in commercial buildings.
- With the growing temperatures in recent years the demand for air conditioners is expected to increase steadily over the coming years. This has further driven the technologically advanced country to adopt smart controlling thermostats in homes and commercial settings alongside the HVAC equipment.
- Combined with this, the government energy regulations and environmental regulations such as Regulation 842/2006/EC stipulate that refrigerant leaks are to be eliminated by carrying out leak inspections in the country. Such occurrences can be controlled by monitored usage of the HVAC equipment with the controls systems.
- The government's measures to create a climate-neutral building stock by 2050 are insufficient, and the country's German Housing Association (GdW) and the CDU Economic Council are looking to shift to decentral heating. The focus on energy efficiency is expected to impact the HVAC controls market over the forecast period positively.

Europe HVAC Controls Industry Overview

The Europe HVAC control market is moderately competitive and comprises a significant number of key players. The market is characterized by several partnerships and strategic collaborative initiatives between key stakeholders to increase their

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competitive edge over the forecast period.

- December 2020 - Belimo, a Switzerland-based HVAC controls company, announced a strategic collaboration with Albased property operations and maintenance platform, Facilio. The partnership aims to optimize the HVAC control systems, building performance in real-time, implement effective sustainability measures, and elevate the tenant experience by Belimo leveraging Facilio's platform.
- July 2020 - J2 Innovations, a company dealing with software development for building automation and IoT applications, entered into a strategic partnership with Clivet SpA, an Italian company, to develop innovative HVAC plant and building optimization solutions.

Additional Benefits:

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

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