

**Chile, Bolivia, and Paraguay HVAC Market Growth Analysis - Market Size, Share, Forecast Trends and Outlook Report (2025-2034)**

Market Report | 2025-06-28 | 125 pages | EMR Inc.

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**Report description:**

The Chile, Bolivia, Paraguay HVAC market size reached around USD 701.08 Million in 2024. The market is projected to grow at a CAGR of 5.20% between 2025 and 2034 to reach nearly USD 1163.92 Million by 2034. This can be attributed to the expansion of hospitality construction pipeline and steady consumer footfall towards local retail stores. Moreover, rapid technological advancements and rising demand for commercial chillers is also expected to drive market expansion in the coming years.

Chile, Bolivia and Paraguay HVAC Market Report Summary

Description

Value

Base Year

USD Million

2024

Historical Period

USD Million

2018-2024

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Forecast Period

USD Million

2025-2034

Market Size 2024

USD Million

701.08

Market Size 2034

USD Million

1163.92

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

5.20%

CAGR 2025-2034 - Market by Country

Bolivia

6.1%

CAGR 2025-2034 - Market by Implementation Type

Retrofits

5.7%

CAGR 2025-2034 - Market by End Use

Residential

5.9%

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## 2024 Market Share by Country

### Paraguay

9.8%

## Chile, Bolivia, and Paraguay HVAC Market Growth

Sustainability has emerged as one of the key trends shaping the market dynamics. For instance, Chilean households have over 6.8 million freezers and refrigerators, with over 1 million of them being over 15 years old. Chile's Ministry of Energy suggests that refrigerators account for nearly 19% of overall electricity consumption by an average household, indicating substantial room for improvement in energy efficiency. This prompted the United Nations Environment Programme and the Global Environment Facility to partner with local HVAC companies like Whirlpool and Samsung to introduce power-efficient refrigerators to consumers under the United for Efficiency (U4E) initiative. This is contributing to Chile, Bolivia, and Paraguay HVAC market expansion.

Under the U4E program, several countries can exchange their old refrigerators at a discount of up to 35% on new models. During the first month of its implementation in Chile, over 1500 consumers exchanged their old refrigerator, which is expected to result in annual electricity savings of nearly USD 294 million. Based on Chile, Bolivia, and Paraguay HVAC market analysis, the program can potentially save up to 1.3 TWh of electricity in Chile and reduce annual carbon emissions by over 600,000 tons. The implementation of this program in these countries is likely to have a favourable impact on overall market growth in the coming years.

## Key Trends and Developments

Rising adoption of modular HVAC systems, rising air quality concerns, rapid urbanisation and infrastructure development, adoption of smart HVAC technologies, and development of renewable energy powered HVAC systems are the major factors driving Chile, Bolivia, and Paraguay HVAC market growth.

### January 2025

Mojave Energy Systems, a US-based HVAC manufacturer, announced its decision to introduce high-performing, energy-efficient, and extremely affordable HVAC solutions in Latin America. Its flagship product, ArctiDry, features a liquid desiccant HVAC system that is a climate-friendly solution and reduces electricity consumption by nearly 50%. This is expected to favourably shape the Chile, Bolivia, and Paraguay HVAC market dynamics in the coming years.

### November 2024

Fabrica Paraguaya de Vidrios (FPV) inaugurated a new hybrid furnace worth USD 43 million to increase its glass recycling capacity by 40% and introduce new forms of bottled packaging in unique formats and designs. The hybrid furnace is expected to 80% powered by renewable energy sources and can potentially increase the company's production capacity by 40%. This is expected to increase Chile, Bolivia, and Paraguay HVAC market size.

### July 2024

Johnson Controls International plc signed a definitive agreement with Robert Bosch Group to sell its Residential and Light Commercial HVAC business for USD 8.1 billion. This is expected to enhance the former's strategic focus on providing

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comprehensive HVAC solutions for commercial buildings, thereby impacting the Chile, Bolivia, and Paraguay HVAC market outlook favourably.

July 2022

Corunclima's 100% electric air conditioning units were integrated into the heavy machinery equipments of a mining company based in Chile to reduce maintenance costs and reduce noise emissions of operations. These units are designed to fit easily into the machine's monoblock and eliminate the need for prior gassing. This is creating a favourable Chile, Bolivia, and Paraguay HVAC market dynamics.

#### Rising air quality concerns

As per the World Air Quality Report, only 7 countries worldwide breathe fresh air, including Iceland, Australia, and Finland. Bolivia has a PM 2.5 concentration of 10-15 µg/m<sup>3</sup>, which has prompted HVAC manufacturers to introduce advanced equipments that ensure proper air ventilation and humidity levels. A similar trend is being witnessed in Chile and Paraguay, which is leading to the growth of Chile, Bolivia, and Paraguay HVAC market revenue.

#### Rising popularity of modular HVAC systems

Major Latin American countries is witnessing growing adoption of modular HVAC systems, which offer flexibility and scalability for various applications. These systems are particularly popular in commercial and industrial sectors, allowing businesses to expand or upgrade climate control capabilities without major overhauls. Their cost-effectiveness, ease of installation, and energy efficiency make them an appealing choice for diverse projects. This is facilitating Chile, Bolivia, and Paraguay HVAC market expansion.

#### Adoption of smart HVAC technologies

Smart HVAC systems with IoT capabilities are gaining traction in Bolivia, offering remote operation, energy monitoring, and automation. These technologies allow users to control temperature settings through smartphones, optimise energy usage, and lower operational costs. The growing preference for convenience and advanced features is propelling the adoption of smart HVAC solutions in the country. This is one of the key Chile, Bolivia, and Paraguay HVAC market trends.

#### Development of renewable energy powered HVAC systems

The integration of renewable energy sources into HVAC systems, such as solar-powered air conditioning, is growing in Chile, Bolivia, and Paraguay. These systems offer a sustainable and cost-effective solution to the country's energy challenges. Businesses and households are increasingly adopting renewable-powered HVAC solutions to reduce energy bills and contribute to environmental conservation.

#### Chile, Bolivia, and Paraguay HVAC Market Trends

##### Growth of retail industry

The expansion of Latin American retail industry is contributing to the demand for modern HVAC systems. Based on industry analysis, the demand for consumer goods has risen for 8 quarters continuously in countries like Bolivia, where traditional shopping channels like convenience stores (32%), and discounters (26%) have recorded significant growth and account for 50% of the market share. This is positively impacting Chile, Bolivia, and Paraguay HVAC market dynamics, as HVAC systems ensure a

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comfortable shopping experience for consumers and preserve shelf life of products for a longer duration.

#### Expansion of hospitality construction industry

The expansion of the existing hotel construction pipeline in Latin America by 11% in Q1 of FY 2024. The growing influx of North American travellers into countries like Bolivia is contributing to the growth of Chile, Bolivia, and Paraguay HVAC market size as the hospitality industry opens new hotels for travellers. Moreover, industry estimates suggest that cumulative carbon emissions pertaining to transport-related tourism are expected to reach 1,998 million tons of CO<sub>2</sub> by 2030. This is expected to increase the demand for energy efficient HVAC systems in the hospitality industry to offset the environmental damage caused by Scope 3 emissions. This is expected to lead to Chile, Bolivia, and Paraguay HVAC market expansion.

#### Chile, Bolivia, and Paraguay HVAC Industry Segmentation

The EMR's report titled "Chile, Bolivia, and Paraguay HVAC Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

##### Breakup by Equipment

? Heating

??? Heat Pumps

??? Furnaces

??? Boilers

? Ventilation

??? Air-Handling Units

??? Air Filters and Purifiers

??? Ventilation Fans

? Cooling

??? Unitary Air Conditioners

??? Split

??? Packaged

??? VRF Systems

??? Chillers

??? Coolers

??? Cooling Towers

##### Breakup by Implementation Type

? New Constructions

? Retrofits

##### Breakup by End Use

? Commercial

? Residential

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? Industrial

Chile, Bolivia, and Paraguay HVAC Market Share

Based on region, the Chile, Bolivia, and Paraguay HVAC can be divided into Chile, Bolivia and Paraguay.

2024 Market Share by

Country

Paraguay

9.8%

Chile

XX%

Bolivia

XX%

Leading Companies in the Chile, Bolivia, Paraguay HVAC Market

Based on Chile, Bolivia, and Paraguay HVAC market analysis, major companies such as Trane and Carrier, are focusing on energy-efficient and smart systems to meet rising demand. They are introducing advanced air purification technologies, expanding renewable energy-integrated HVAC solutions, and enhancing distribution networks. Additionally, companies are targeting urban infrastructure projects and industrial facilities, offering customised, high-capacity climate control systems tailored to local needs.

Midea Group Co. Ltd.

Midea Group Co. Ltd. was founded in 1968 and is headquartered in Guangdong, China. It serves over 500 million customers globally through its high-tech HVAC systems and equipments, home appliances, and robotic solutions, among others.

Daikin Industries, Ltd.

Daikin Industries, Ltd. was founded in 1924 and is headquartered in Osaka, Japan. It specialises in manufacturing advanced air conditioning units and refrigeration systems, apart from fluorochemicals and filter products.

Carrier Global Corporation

Carrier Global Corporation was founded in 1915 and is headquartered in Floria, United States. It specialises in designing building automation solutions, fire safety systems, HVAC equipments, and security products, among others.

Johnson Controls International PLC

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Johnson Controls International PLC was founded in 1885 and is headquartered in Ireland. It specialises in making and distributing sustainable HVAC systems and industrial refrigeration solutions.

Other players included in Chile, Bolivia, and Paraguay HVAC market report are Robert Bosch GmbH, Trane Technologies Company, LLC, Fujitsu Ltd., Samsung Electronics Co., Ltd., LG Electronics Inc, InamarVapor, Anwo S.A., Airolite SA, Calderas Chile Ltda., Teplo Refrigeracion, and Texpro srl, among others.

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Middle East and Africa HVAC Market

## **Table of Contents:**

- 1 Executive Summary
  - 1.1 Market Size 2024-2025
  - 1.2 Market Growth 2025(F)-2034(F)
  - 1.3 Key Demand Drivers
  - 1.4 Key Players and Competitive Structure
  - 1.5 Industry Best Practices
  - 1.6 Recent Trends and Developments
  - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
  - 2.1 Market Trends
  - 2.2 Key Verticals
  - 2.3 Key Regions
  - 2.4 Supplier Power
  - 2.5 Buyer Power
  - 2.6 Key Market Opportunities and Risks
  - 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
  - 3.1 GDP Outlook
  - 3.2 GDP Per Capita Growth
  - 3.3 Inflation Trends
  - 3.4 Democracy Index
  - 3.5 Gross Public Debt Ratios
  - 3.6 Balance of Payment (BoP) Position
  - 3.7 Population Outlook
  - 3.8 Urbanisation Trends

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- 4 Country Risk Profiles
  - 4.1 Country Risk
  - 4.2 Business Climate
- 5 Bolivia HVAC Market Analysis
  - 5.1 Key Industry Highlights
  - 5.2 Bolivia HVAC Historical Market (2018-2024)
  - 5.3 Bolivia HVAC Market Forecast (2025-2034)
  - 5.4 Bolivia HVAC Market by Equipment
    - 5.4.1 Heating
      - 5.4.1.1 Historical Trend (2018-2024)
      - 5.4.1.2 Forecast Trend (2025-2034)
      - 5.4.1.3 Breakup by Type
        - 5.4.1.3.1 Heat Pumps
        - 5.4.1.3.2 Furnaces
        - 5.4.1.3.3 Boilers
    - 5.4.2 Ventilation
      - 5.4.2.1 Historical Trend (2018-2024)
      - 5.4.2.2 Forecast Trend (2025-2034)
      - 5.4.2.3 Breakup by Type
        - 5.4.2.3.1 Air-Handling Units
        - 5.4.2.3.2 Air Filters and Purifiers
        - 5.4.2.3.3 Ventilation Fans
    - 5.4.3 Cooling
      - 5.4.3.1 Historical Trend (2018-2024)
      - 5.4.3.2 Forecast Trend (2025-2034)
      - 5.4.3.3 Breakup by Type
        - 5.4.3.3.1 Unitary Air Conditioners
        - 5.4.3.3.2 VRF Systems
        - 5.4.3.3.3 Chillers
        - 5.4.3.3.4 Coolers
        - 5.4.3.3.5 Cooling Towers
  - 5.5 Bolivia HVAC Market by Implementation Type
    - 5.5.1 New Constructions
      - 5.5.1.1 Historical Trend (2018-2024)
      - 5.5.1.2 Forecast Trend (2025-2034)
    - 5.5.2 Retrofits
      - 5.5.2.1 Historical Trend (2018-2024)
      - 5.5.2.2 Forecast Trend (2025-2034)
  - 5.6 Bolivia HVAC Market by End Use
    - 5.6.1 Commercial
      - 5.6.1.1 Historical Trend (2018-2024)
      - 5.6.1.2 Forecast Trend (2025-2034)
    - 5.6.2 Residential
      - 5.6.2.1 Historical Trend (2018-2024)
      - 5.6.2.2 Forecast Trend (2025-2034)
    - 5.6.3 Industrial
      - 5.6.3.1 Historical Trend (2018-2024)

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- 5.6.3.2 Forecast Trend (2025-2034)
- 6 Paraguay HVAC Market Analysis
  - 6.1 Key Industry Highlights
  - 6.2 Paraguay HVAC Historical Market (2018-2024)
  - 6.3 Paraguay HVAC Market Forecast (2025-2034)
  - 6.4 Paraguay HVAC Market by Equipment
    - 6.4.1 Heating
      - 6.4.1.1 Historical Trend (2018-2024)
      - 6.4.1.2 Forecast Trend (2025-2034)
      - 6.4.1.3 Breakup by Type
        - 6.4.1.3.1 Heat Pumps
        - 6.4.1.3.2 Furnaces
        - 6.4.1.3.3 Boilers
    - 6.4.2 Ventilation
      - 6.4.2.1 Historical Trend (2018-2024)
      - 6.4.2.2 Forecast Trend (2025-2034)
      - 6.4.2.3 Breakup by Type
        - 6.4.2.3.1 Air-Handling Units
        - 6.4.2.3.2 Air Filters and Purifiers
        - 6.4.2.3.3 Ventilation Fans
    - 6.4.3 Cooling
      - 6.4.3.1 Historical Trend (2018-2024)
      - 6.4.3.2 Forecast Trend (2025-2034)
      - 6.4.3.3 Breakup by Type
        - 6.4.3.3.1 Unitary Air Conditioners
        - 6.4.3.3.2 VRF Systems
        - 6.4.3.3.3 Chillers
        - 6.4.3.3.4 Coolers
        - 6.4.3.3.5 Cooling Towers
  - 6.5 Paraguay HVAC Market by Implementation Type
    - 6.5.1 New Constructions
      - 6.5.1.1 Historical Trend (2018-2024)
      - 6.5.1.2 Forecast Trend (2025-2034)
    - 6.5.2 Retrofits
      - 6.5.2.1 Historical Trend (2018-2024)
      - 6.5.2.2 Forecast Trend (2025-2034)
  - 6.6 Paraguay HVAC Market by End Use
    - 6.6.1 Commercial
      - 6.6.1.1 Historical Trend (2018-2024)
      - 6.6.1.2 Forecast Trend (2025-2034)
    - 6.6.2 Residential
      - 6.6.2.1 Historical Trend (2018-2024)
      - 6.6.2.2 Forecast Trend (2025-2034)
    - 6.6.3 Industrial
      - 6.6.3.1 Historical Trend (2018-2024)
      - 6.6.3.2 Forecast Trend (2025-2034)
- 7 Chile HVAC Market Analysis

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- 7.1 Key Industry Highlights
- 7.2 Chile HVAC Historical Market (2018-2024)
- 7.3 Chile HVAC Market Forecast (2025-2034)
- 7.4 Chile HVAC Market by Equipment
  - 7.4.1 Heating
    - 7.4.1.1 Historical Trend (2018-2024)
    - 7.4.1.2 Forecast Trend (2025-2034)
    - 7.4.1.3 Breakup by Type
      - 7.4.1.3.1 Heat Pumps
      - 7.4.1.3.2 Furnaces
      - 7.4.1.3.3 Boilers
  - 7.4.2 Ventilation
    - 7.4.2.1 Historical Trend (2018-2024)
    - 7.4.2.2 Forecast Trend (2025-2034)
    - 7.4.2.3 Breakup by Type
      - 7.4.2.3.1 Air-Handling Units
      - 7.4.2.3.2 Air Filters and Purifiers
      - 7.4.2.3.3 Ventilation Fans
  - 7.4.3 Cooling
    - 7.4.3.1 Historical Trend (2018-2024)
    - 7.4.3.2 Forecast Trend (2025-2034)
    - 7.4.3.3 Breakup by Type
      - 7.4.3.3.1 Unitary Air Conditioners
      - 7.4.3.3.2 VRF Systems
      - 7.4.3.3.3 Chillers
      - 7.4.3.3.4 Coolers
      - 7.4.3.3.5 Cooling Towers
- 7.5 Chile HVAC Market by Implementation Type
  - 7.5.1 New Constructions
    - 7.5.1.1 Historical Trend (2018-2024)
    - 7.5.1.2 Forecast Trend (2025-2034)
  - 7.5.2 Retrofits
    - 7.5.2.1 Historical Trend (2018-2024)
    - 7.5.2.2 Forecast Trend (2025-2034)
- 7.6 Chile HVAC Market by End Use
  - 7.6.1 Commercial
    - 7.6.1.1 Historical Trend (2018-2024)
    - 7.6.1.2 Forecast Trend (2025-2034)
  - 7.6.2 Residential
    - 7.6.2.1 Historical Trend (2018-2024)
    - 7.6.2.2 Forecast Trend (2025-2034)
  - 7.6.3 Industrial
    - 7.6.3.1 Historical Trend (2018-2024)
    - 7.6.3.2 Forecast Trend (2025-2034)
- 8 Market Dynamics
  - 8.1 SWOT Analysis
    - 8.1.1 Strengths

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- 8.1.2 Weaknesses
- 8.1.3 Opportunities
- 8.1.4 Threats
- 8.2 Porter's Five Forces Analysis
  - 8.2.1 Supplier's Power
  - 8.2.2 Buyer's Power
  - 8.2.3 Threat of New Entrants
  - 8.2.4 Degree of Rivalry
  - 8.2.5 Threat of Substitutes
- 8.3 Key Indicators of Demand
- 8.4 Key Indicators of Price
- 9 Competitive Landscape
  - 9.1 Supplier Selection
  - 9.2 Key Global Players
  - 9.3 Key Regional Players
  - 9.4 Key Player Strategies
  - 9.5 Company Profile
    - 9.5.1 Robert Bosch GmbH
      - 9.5.1.1 Company Overview
      - 9.5.1.2 Product Portfolio
      - 9.5.1.3 Demographic Reach and Achievements
      - 9.5.1.4 Certifications
    - 9.5.2 Trane Technologies Company, LLC
      - 9.5.2.1 Company Overview
      - 9.5.2.2 Product Portfolio
      - 9.5.2.3 Demographic Reach and Achievements
      - 9.5.2.4 Certifications
    - 9.5.3 Johnson Controls International PLC
      - 9.5.3.1 Company Overview
      - 9.5.3.2 Product Portfolio
      - 9.5.3.3 Demographic Reach and Achievements
      - 9.5.3.4 Certifications
    - 9.5.4 Fujitsu Ltd.
      - 9.5.4.1 Company Overview
      - 9.5.4.2 Product Portfolio
      - 9.5.4.3 Demographic Reach and Achievements
      - 9.5.4.4 Certifications
    - 9.5.5 Midea Group Co. Ltd.
      - 9.5.5.1 Company Overview
      - 9.5.5.2 Product Portfolio
      - 9.5.5.3 Demographic Reach and Achievements
      - 9.5.5.4 Certifications
    - 9.5.6 Samsung Electronics Co., Ltd.
      - 9.5.6.1 Company Overview
      - 9.5.6.2 Product Portfolio
      - 9.5.6.3 Demographic Reach and Achievements
      - 9.5.6.4 Certifications

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- 9.5.7 LG Electronics Inc
  - 9.5.7.1 Company Overview
  - 9.5.7.2 Product Portfolio
  - 9.5.7.3 Demographic Reach and Achievements
  - 9.5.7.4 Certifications
- 9.5.8 Daikin Industries, Ltd.
  - 9.5.8.1 Company Overview
  - 9.5.8.2 Product Portfolio
  - 9.5.8.3 Demographic Reach and Achievements
  - 9.5.8.4 Certifications
- 9.5.9 Carrier Global Corporation
  - 9.5.9.1 Company Overview
  - 9.5.9.2 Product Portfolio
  - 9.5.9.3 Demographic Reach and Achievements
  - 9.5.9.4 Certifications
- 9.5.10 InamarVapor
  - 9.5.10.1 Company Overview
  - 9.5.10.2 Product Portfolio
  - 9.5.10.3 Demographic Reach and Achievements
  - 9.5.10.4 Certifications
- 9.5.11 Anwo S.A.
  - 9.5.11.1 Company Overview
  - 9.5.11.2 Product Portfolio
  - 9.5.11.3 Demographic Reach and Achievements
  - 9.5.11.4 Certifications
- 9.5.12 Airolite SA
  - 9.5.12.1 Company Overview
  - 9.5.12.2 Product Portfolio
  - 9.5.12.3 Demographic Reach and Achievements
  - 9.5.12.4 Certifications
- 9.5.13 Calderas Chile Ltda.
  - 9.5.13.1 Company Overview
  - 9.5.13.2 Product Portfolio
  - 9.5.13.3 Demographic Reach and Achievements
  - 9.5.13.4 Certifications
- 9.5.14 Teplo Refrigeracion
  - 9.5.14.1 Company Overview
  - 9.5.14.2 Product Portfolio
  - 9.5.14.3 Demographic Reach and Achievements
  - 9.5.14.4 Certifications
- 9.5.15 Texpro srl
  - 9.5.15.1 Company Overview
  - 9.5.15.2 Product Portfolio
  - 9.5.15.3 Demographic Reach and Achievements
  - 9.5.15.4 Certifications
- 9.5.16 Others

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