

Air Conditioner Market - Global Outlook and Forecast 2019-2024

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Abstracts

The global air conditioner (AC) market by revenue is expected to grow at a CAGR of over 5% during the period 2018-2024.

The global air conditioner (AC) market is expected to be driven by three major countries – China, the US, and Japan during the forecast period. These countries account for more than 70% of the value and over 60% of the volume of air conditioner equipment. Geographically, APAC is the leader in the demand for AC. The consumer acceptance of new and efficient products is low in APAC while the same is high in North America and Western Europe. At the global level, China leads the variable refrigerant flow (VRF) segment, with more than 55% share in sales, followed by Japan, Europe, and South Korea. The demand for multi-split models is growing rapidly across APAC, driven by steady economic progress and commercial office construction growth.

Stringent regulatory compliances are expected to increase as the greenhouse gas emission, and electricity consumption is growing at a rapid pace. In many of the regions, 70% of the electricity consumption at residential spaces is on account of using air conditioner devices. More than 40 countries have implemented standards and labeling policies for the models. Therefore, on-going improvements in technology are mainly driven by regulatory compliance and amenability.

The following factors are likely to contribute to the growth of the air conditioner market during the forecast period:

Increased Demand for VRF Air Conditioners

Growth in the Construction Market

Energy Efficiency and CHG Emission Cut Down

Multiple of Barriers to High Energy Efficient ACs

The market study considers the present scenario of the global air conditioner (AC) market and its market dynamics for the period 2018-2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The report covers both the demand and supply sides of the market. It also profiles and examines leading companies and other prominent companies operating in the air conditioner market.

Air Conditioner Market: Segmentation

This research report includes a detailed segmentation by type, applications, and geography.

The demand for single and multi-split models is growing rapidly. The growing electricity consumption has driven the high adoption of grade 1 RAC, with better energy efficiency and low cost. Although window air conditioners are inexpensive, the popularity is declined as they restrict the natural flow of air and light and produce a high level of vibration and noise.

Single split air conditioner devices are majorly replacing window AC models in the residential sector, as they are highly efficient. The efficiency is estimated to be up to 30% more than the other types of devices. Non-inverter types single split devices are majorly in demand in low-income countries as the inverter type has a high installation cost.

Multi-split AC is used to cool multiple rooms. The multi-split segment is one of the fastest-growing as these allow for multiple types of indoor units. The decline in window AC has resulted in the growth of both single and multi-split models. Multi-split devices are mainly used in the commercial sector, especially in small offices.

Commercial air conditioner devices are mainly used to provide air conditioning to a large space making use of highly efficient cooling systems. VRF systems are mainly the HFC-compliant, while packaged models are still dependent on HCFC refrigerant in APAC and the Middle East. Japan, Oceania, and the US to a larger extent have shifted entirely to HFC refrigerants. China and other APAC countries have emerged as major

end-users of multi-split devices. VRFs are replacing chillers in many regions and have a higher potential in the future.

As the requirement for air conditioning is growing, the residential sector is exhibiting stronger demand than the commercial sector. The growth in the residential construction market and the replacement market are the major drivers for the demand in the residential sector. Soaring temperatures across regions, due to global warming, have increased the demand even from those regions which were earlier characterized by ideal climatic conditions. Changing climatic conditions, affordability, and lifecycle cost savings play a major role in increasing market demand.

Market Segmentation by Type

RAC

- Single Split ACs

- Window ACs

- Multi Split ACs

CAC

- PAC

- VRF

Market Segmentation by Application

- Residential Sector

- Commercial Sector

 - Office Space

 - Airports and Public Utilities

 - Hospitality

Hospitals

Industrial and Others

Geographical Insights

The growth in APAC is largely driven by metropolitan and tier 2 cities with high disposable income. China, India, and Southeast Asian countries are some of the regions, which have a high potential for the market. The largely untapped tier 2 and tier 3 cities' growth rate for AC consumption is slow and offsets the rapid growth witnessed in major urban hubs.

The North American AC market has been boosted by high capital investments and the rise in the consumer income, aided by tax cuts. The trend is positive and bullish in the market. The competition is high and the pricing structure plays an important differentiating factor. The demand is mainly for high-energy efficient devices. Stringent administrative guidelines on reducing the energy consumption will have a major impact on the industry with respect to cost and selling price. The US market is driven by the rise in residential construction and the growing demand for replacements.

The Europe market has been growing steadily with respect to value; however, the volume has been stagnant. The long-term outlook for demand in Europe is moderately positive, while the short-term outlook is very bright. Extended summers and heat waves are increasing the demand in the short term. The demand is on the rise in Latin America, as the temperatures soar in summers to very high degrees, and also, the disposable income of the population has grown significantly.

Market Segmentation by Geography

Europe

Germany

France

Italy

UK

Spain

Russia

Switzerland

APAC

China

Japan

India

Australia

Indonesia

South Korea

North America

US

Canada

Latin America

Mexico

Brazil

Argentina

Colombia

MEA

Saudi Arabia

Turkey

South Africa

UAE

Egypt

Key Vendor Analysis

The global air conditioner (AC) market is highly competitive with a high influx of global, regional, and local players. The majority share of the market is captured by global companies such as Daikin, Voltas, LG, Carrier, and Midea. To maintain a competitive edge with other players, the global players are focusing on developing innovative products and increasing their product portfolio by making considerable investments in R&D. Global companies have come up with new strategies such as the introduction of new products, marketing, and promotional activities, investing in joint ventures, and following dual-brand strategies in some regions to capture the market.

The competitive intensity for the air conditioner market is higher in APAC currently on account of a largely untapped market. Vendors compete on various factors such as brand, geographical presence, product portfolio, features of the products, refrigerants used, power consumption, and efficiency of the products developed.

Key Vendors

Bluestar

Carrier

Daikin

Johnson Controls

LG

Midea

Mitsubishi Electric

Panasonic

Samsung

Voltas

Other Prominent Vendors

Bosch

Chigo

Cruise

Dunham-Bush

Fedders

Fujitsu

Galanz

Godrej

Gree

Haier

Hitachi

IFB

Lloyd Electric

Micromax

Onida

Sanyo

TCL

Toshiba

Trane

Whirlpool

Key Market Insights

The report provides the following insights into the air conditioner market for the forecast period 2019–2024.

Offers sizing and growth prospects of the market for the forecast period 2019–2024.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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