

# HVAC Market in Europe - Industry Outlook and Forecast 2020-2025

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## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Europe HVAC Market Report

The HVAC market in Europe is expected to grow at a CAGR of over 6% during the period 2019–2025.

The heating, ventilation, and air conditioning (HVAC) market in Europe is expected to face volatility in the HVAC industry owing to various equipment it produces by sourcing raw materials from several low-cost countries, especially China. The supply chain aspect of the industry in Q1 & Q2 of 2020 was profoundly affected by the outbreak of the COVID-19 pandemic. The growth rates have been truncated on account of COVID-19. Taking into account the probable impact, the growth estimates are expected to be down by 2% to 3%. The growth estimates for the residential sector and small commercial sectors are also likely to be impacted. The challenges are majorly from the demand side, with a varying degree of demand fluctuation across countries. With the HVAC system being a major cost factor in buildings, constituting around 15% to 20%, the impact is expected to be severe in 2020. There is no uniformity in the demand across countries and depends on the fiscal stimulus, the containment of COVID-19 spread, and the recovery of the construction industry (new and refurbishment).

The following factors are likely to contribute to the growth of the HVAC market in Europe during the forecast period:

Industry Consolidation Post COVID-19

Airport Modernization

## Growth of VRF Systems

The study considers the present scenario of the HVAC market in Europe and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

### HVAC Market in Europe: Segmentation

The research report on HVAC market in Europe includes a detailed segmentation by equipment, application, and geography. The heating equipment market is characterized by intense competition. Heating products have witnessed high traction in colder climatic conditions of Europe. With a rapid rise in the requirement of more advanced heating equipment and less energy consumption, the market has seen an influx of Asia Pacific companies in the European market. The heat equipment segment is further categorized into heat pumps, furnace, and boiler units. Heat pumps are the major revenue generator for the heating market. The heat pump segment is mainly strong in nuclear families, with a penetration rate of over 70%. Boilers have the highest demand in Europe. In terms of production and demand, the region is still one of the leading markets for high-efficiency boilers.

Currently, the demand for HVAC systems from the residential sector is expected to be adversely affected by the COVID-19 outbreak. The new equipment and replacement demand are likely to be impacted, as consumers are looking to cut down on non-essential purchases. The residential HVAC market is likely to be truncated with growth rates witnessing a reduction. Air purifier filters are expected to face higher challenges, and also other products that are dependent on replacement demand more than new demand. The demand from Germany, France, UK, Russia, is also expected to witness challenging market conditions. However, post Q4 of 2020, the market is likely to pick up traction mainly driven by smaller countries with low impact of COVID-19. Although Nordic and Eastern Europe are less impacted, the recovery in the market conditions of Western Europe will have substantial bearings on the margins of the vendors in the HVAC industry.

The HVAC market end-users in the commercial sector are going through a rough phase concerning demand; hence their spending on HVAC modernization or service and

maintenance is expected to decline by 2020. The renewal of contracts between service providers and customers is expected to be delayed and impacted by the HVAC market. However, post-2020, the market stabilization based on economic and financial stimulus is likely to be stable, although some countries will take more time for recovery. The European HVAC market is strong in Western Europe, where investment in infrastructure development is high. The market in Southern Europe is expected to grow decently without any steep uptrend or downtrend.

## Segmentation by Equipment

### Heating

- Heat Pump

- Boiler Units

- Furnaces

- Others

### Air Conditioning

- RAC

- CAC

- Chillers

- Heat Exchanges

- Others

### Ventilation

- Air Handling Units

- Air filters

- Humidifiers & Dehumidifiers

Fan Coil Units

Others

### Segmentation by Application

Residential

Commercial

Airports & Public

Office Spaces

Hospitality

Hospitals

Industrial & Others

### Insights By Geography

Western Europe is currently facing several restraints on account of the uncertainty due to the COVID-19 crisis and strong lockdown measures. Italy, Germany, and the UK have strongly been impacted by the virus and are facing enormous economic challenges. Apart from the construction industry is profoundly affected by projects coming to a standstill, the replacement demand from existing buildings is also taken a hit. Air conditioning systems lead the Western Europe market as the temperature rises in urban cities on account of pollution, urbanization, and global warming. The application of HVAC systems in Germany is expected to be higher in non-residential units such as hospitals, public offices, and public utilities centers during the period 2020–2025. In Germany, centralized air conditioning solutions are growing in demand by way of chillers and VRF systems. However, in many places, the VRF systems are replacing chillers. Moreover, the impact of COVID-19 during the Q1 2020 has increased safety concerns and demand for quality air among people in Germany.

## Segmentation by Geography

### Western Europe

UK

Germany

France

Italy

Netherlands

### Nordic

Norway

Denmark

Sweden

Others

### Central & Eastern Europe

Russia

Poland & Austria

Others

## Insights By Vendors

The HVAC market in Europe before the outbreak of COVID-19 was going through a transition period, which was mainly on three fronts – regulations, technological upheaval, and construction industry rebound in many countries. In the post-COVID-19 outbreak, the industry is witnessing a financial turmoil. The need for efficient HVAC has

increased in Europe primarily driven by EU directions, objectives, and targets on the same. This has also affected the consumer trends with awareness on HVAC equipment, which have low lifecycle costs fueling higher demand in the HVAC market in Europe.

#### Prominent Vendors

Systemair

Johnson Controls

Zehnder

Ostberg

Aldes

Bosch

Daikin

Samsung

Mitsubishi Electric

#### Other Prominent Vendors

LG

Panasonic

Carrier

Midea

Regal

Raytheon Technologies

Honeywell

Flakt Group

Beijer Ref

Flexit

Grundfos

Swegon

VTSS

Nuaire

Nortek

Alfa Laval

Hitachi

Lu-ve

## Key Questions Answered

1. What is the market size of HVAC market in Europe and growth forecast?
2. What is the market size of the Residential HVAC system market in Europe?
3. What are some of the growth factors impacting the heating, ventilation, and air conditioning market?
4. What is the growth projection of the HVAC market in Europe in the commercial segment by 2025?
5. How is the COVID-19 pandemic significantly impacting the market growth of HVAC systems?
6. Who are the prominent players in the HVAC industry, and how are their market shares growing during the forecast period?

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