

Global Scroll Compressor Market - 2025 -2032

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Abstracts

Market Overview

Global Scroll Compressor Market reached US\$ 3,982.38 million in 2024 and is expected to reach US\$ 9,616.40 million by 2032, growing with a CAGR of 11.65% during the forecast period 2025-2032.

The global scroll compressor market is witnessing steady growth, driven by increasing demand for energy-efficient HVAC systems, expanding cold chain infrastructure, rising industrial applications, and advancements in digital scroll technology. The market is experiencing strong adoption across residential, commercial, and industrial sectors, where scroll compressors are preferred for their high efficiency, compact design, low noise levels, and minimal maintenance requirements.

The growing urbanization and infrastructure development in emerging economies like India, China, and Brazil are further propelling demand, particularly in smart buildings and green HVAC solutions. Additionally, the rise of electric vehicles (EVs) and hybrid cars is creating new opportunities, as scroll compressors are widely used in battery thermal management systems.

Scroll Compressor Market Trend

The scroll compressor market is witnessing significant growth, driven by increasing demand for energy-efficient HVAC systems and a global push toward sustainable building technology. A notable trend is the rising adoption of inverter-based scroll compressors, which offer variable speed operation, leading to improved energy efficiency and quieter performance. For instance, Daikin and LG Electronics have incorporated inverter scroll compressors in their latest air conditioning units to meet stringent energy regulations in regions like Europe and North America.

Another emerging trend is the use of eco-friendly refrigerants such as R-32 and R-290, which has prompted companies like Emerson Climate Technologies to develop scroll compressors compatible with low-GWP (Global Warming Potential) refrigerants. Additionally, the rapid urbanization and infrastructure development in Asia-Pacific countries, especially India and China, are boosting the demand for commercial HVAC systems that rely on scroll compressors for compactness and reliability.

1.2 Market Dynamics

Rising Expansion of the Cold Chain Industry

The cold chain industry is experiencing rapid expansion due to the growing demand for temperature-sensitive products, particularly in food & beverage, pharmaceuticals, and e-commerce logistics. Scroll compressors play a critical role in refrigeration systems used in cold storage warehouses, refrigerated transport, and retail cooling solutions, making their adoption essential for ensuring efficient and reliable cooling operations.

For instance, in the pharmaceutical sector, the increasing global distribution of vaccines, biologics, and temperature-sensitive drugs has heightened the need for advanced cold chain logistics. The widespread rollout of COVID-19 vaccines, which required strict temperature control (e.g., Pfizer-BioNTech vaccine stored at -70°C), accelerated investments in ultra-low temperature cold storage solutions where scroll compressors are a key component.

Additionally, the demand for mRNA-based drugs and biosimilars further drives the need for high-efficiency scroll compressor-based refrigeration systems to maintain product efficacy. Moreover, the growth of e-commerce grocery platforms such as Walmart, Amazon Fresh, and Alibaba's Freshippo has intensified the need for last-mile refrigerated delivery solutions.

High Initial Investment and Maintenance Costs

The high initial investment and maintenance costs associated with scroll compressors act as a significant restraint on market growth, particularly in cost-sensitive regions and among small and medium-sized enterprises (SMEs). While scroll compressors offer superior energy efficiency and reliability, their upfront cost is generally higher than that of traditional reciprocating compressors.

This deters adoption in emerging economies where budget constraints often lead buyers to prioritize lower initial expenditure over long-term operational savings. Additionally, specialized components and the need for skilled technicians for maintenance and repairs add to the overall lifecycle cost. For example, in rural and semi-urban parts of countries like India and Indonesia, many small-scale cold storage operators opt for less expensive alternatives due to limited access to technical support and capital funding.

1.3 Segment Analysis

The global scroll compressor market is segmented based on stage, technology, application, and region.

Scroll Compressors Gain Momentum with Growth in Air Conditioning Applications

The air conditioning segment is a key driver of the scroll compressor market, owing to the growing global demand for efficient, compact, and low-noise cooling solutions across residential, commercial, and industrial sectors. Scroll compressors are widely used in air conditioning systems due to their high energy efficiency, smooth operation, and lower maintenance requirements compared to traditional piston compressors. The increasing construction of green buildings and smart homes has fueled the adoption of advanced HVAC systems, which often rely on scroll compressors.

For instance, LG Electronics and Daikin Industries have integrated scroll compressor technology into their inverter-based split and central air conditioning systems to meet energy efficiency regulations in countries like Japan, the U.S., and the UAE. Additionally, the surge in urbanization and rising disposable incomes in emerging economies such as India, Vietnam, and the Philippines has led to a boom in residential air conditioner installations, directly boosting demand for scroll compressors .

1.4 Geographical Penetration

Asia-Pacific Leads Scroll Compressor Market Amid Industrial and Infrastructure Boom

Asia-Pacific region dominates the scroll compressor market due to rapid urbanization, robust industrial growth, and increasing investments in infrastructure development. Countries like China, India, Japan, and South Korea are at the forefront of this growth, driven by expanding construction activities and rising demand for energy-efficient HVAC systems. For instance, Globally, China's manufacturing process is even more

pronounced.

In 2024, the country contributed around 30% of the global manufacturing added value, maintaining its position as the world's largest manufacturing powerhouse for 15 consecutive years. This immense contribution underscores the sector's critical role in global supply chains, influencing everything from consumer electronics to heavy machinery. Additionally, the total infrastructure investment in India has significantly increased, with public and private sector contributions shaping the growth trajectory. India's total infrastructure spending has grown exponentially, with budget allocations rising to ₹10 lakh crore (USD 120.5 billion) in 2023-24. Thus, above factors helps to boost the region growth.

1.5 Sustainability Analysis

The sustainability analysis of the scroll compressor market highlights a growing shift toward environmentally responsible manufacturing and energy-efficient technologies. Scroll compressors are inherently more efficient and emit less noise and vibration compared to traditional reciprocating compressors, aligning well with global sustainability goals.

Manufacturers are increasingly adopting eco-friendly refrigerants like R-32 and R-290, which have lower Global Warming Potential (GWP), to comply with international environmental regulations such as the Kigali Amendment and EU F-Gas Regulation. For instance, companies like Emerson, Danfoss, and Mitsubishi Electric are investing in R&D to develop scroll compressors optimized for low-GWP refrigerants and variable-speed operations, reducing overall carbon footprints.

1.6 Competitive Landscape

The major global players in the market include Mitsui Seiki Kogyo, Siemens-Energy, Hitachi Ltd., Panasonic Corporation, Danfoss, Atlas Copco, Copeland LP., Ingersoll Rand, BOGE Compressors, Fujitsu General and among others.

1.7 Key Developments

In 2024, Copeland, a global provider of sustainable climate solutions, announces its launch of the Copeland 50HP scroll compressor –an efficient and reliable compressor that is compatible with R-32, R-454B and R-410A refrigerants and will help customers to build heat pumps with superior heating

capability.

In 2024, LG Electronics (LG) announces the opening of a new scroll compressor production line at its factory in Monterrey, Mexico. The new line bolsters LG's scroll compressor manufacturing infrastructure, enabling the company to produce more of its acclaimed, eco-conscious solutions while creating a shorter supply chain for servicing customers across North America.

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Contents

1. METHODOLOGY AND SCOPE

- 1.1. Research Methodology
- 1.2. Research Objective and Scope of the Report

2. DEFINITION AND OVERVIEW

3. EXECUTIVE SUMMARY

- 3.1. Snippet by Stage
- 3.2. Snippet by Technology
- 3.3. Snippet by Application
- 3.4. Snippet by Region

4. DYNAMICS

- 4.1. Impacting Factors
 - 4.1.1. Drivers
 - 4.1.1.1. Rising Expansion of the Cold Chain Industry
 - 4.1.2. Restraints
 - 4.1.2.1. High Initial Investment and Maintenance Costs
 - 4.1.3. Opportunity
 - 4.1.4. Impact Analysis

5. INDUSTRY ANALYSIS

- 5.1. Porter's Five Force Analysis
- 5.2. Supply Chain Analysis
- 5.3. Pricing Analysis
- 5.4. Regulatory and Compliance Analysis
- 5.5. Sustainability Analysis
- 5.6. DMI Opinion

6. BY STAGE

- 6.1. Introduction
 - 6.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage

- 6.1.2. Market Attractiveness Index, By Stage
- 6.2. Single-Stage Scroll Compressors *
 - 6.2.1. Introduction
 - 6.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 6.3. Two-Stage Scroll Compressors

7. BY TECHNOLOGY

- 7.1. Introduction
 - 7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology
 - 7.1.2. Market Attractiveness Index, By Technology
- 7.2. Fixed-Speed Scroll Compressors *
 - 7.2.1. Introduction
 - 7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 7.3. Variable-Speed Scroll Compressors
- 7.4. Digital Scroll Compressors

8. BY APPLICATION

- 8.1. Introduction
 - 8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application
 - 8.1.2. Market Attractiveness Index, By Application
- 8.2. Air Conditioning *
 - 8.2.1. Introduction
 - 8.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 8.3. Refrigeration
- 8.4. Heat Pumps
- 8.5. Vacuum Pumps
- 8.6. Compressed Air Systems
- 8.7. Automotive Air Conditioning
- 8.8. Others

9. BY REGION

- 9.1. Introduction
 - 9.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Region
 - 9.1.2. Market Attractiveness Index, By Region
- 9.2. North America
 - 9.2.1. Introduction

9.2.2. Key Region-Specific Dynamics

9.2.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage

9.2.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology

9.2.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

9.2.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

9.2.6.1. US

9.2.6.2. Canada

9.2.6.3. Mexico

9.3. Europe

9.3.1. Introduction

9.3.2. Key Region-Specific Dynamics

9.3.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage

9.3.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology

9.3.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

9.3.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

9.3.6.1. Germany

9.3.6.2. UK

9.3.6.3. France

9.3.6.4. Italy

9.3.6.5. Spain

9.3.6.6. Rest of Europe

9.4. South America

9.4.1. Introduction

9.4.2. Key Region-Specific Dynamics

9.4.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage

9.4.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology

9.4.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

9.4.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

9.4.6.1. Brazil

9.4.6.2. Argentina

9.4.6.3. Rest of South America

9.5. Asia-Pacific

9.5.1. Introduction

9.5.2. Key Region-Specific Dynamics

9.5.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage

9.5.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology

9.5.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

9.5.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

9.5.6.1. China

- 9.5.6.2. India
- 9.5.6.3. Japan
- 9.5.6.4. Australia
- 9.5.6.5. Rest of Asia-Pacific

9.6. Middle East and Africa

- 9.6.1. Introduction
- 9.6.2. Key Region-Specific Dynamics
- 9.6.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Stage
- 9.6.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Technology
- 9.6.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Application

10. COMPETITIVE LANDSCAPE

- 10.1. Competitive Scenario
- 10.2. Market Positioning/Share Analysis
- 10.3. Mergers and Acquisitions Analysis

11. COMPANY PROFILES

- 11.1. Mitsui Seiki Kogyo *
 - 11.1.1. Company Overview
 - 11.1.2. Product Portfolio and Description
 - 11.1.3. Financial Overview
 - 11.1.4. Key Developments
- 11.2. Siemens-Energy
- 11.3. Hitachi Ltd.
- 11.4. Panasonic Corporation
- 11.5. Danfoss
- 11.6. Atlas Copco
- 11.7. Copeland LP.
- 11.8. Ingersoll Rand
- 11.9. BOGE Compressors
- 11.10. Fujitsu General (LIST NOT EXHAUSTIVE)

12. APPENDIX

- 12.1. About Us and Services
- 12.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 Global Scroll Compressor Market Value, By Stage, 2024, 2028 & 2032 (US\$ Million)

Table 2 Global Scroll Compressor Market Value, By Technology, 2024, 2028 & 2032 (US\$ Million)

Table 3 Global Scroll Compressor Market Value, By Application, 2024, 2028 & 2032 (US\$ Million)

Table 4 Global Scroll Compressor Market Value, By Region, 2024, 2028 & 2032 (US\$ Million)

Table 5 Global Scroll Compressor Market Value, By Stage, 2024, 2028 & 2032 (US\$ Million)

Table 6 Global Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 7 Global Scroll Compressor Market Value, By Technology, 2024, 2028 & 2032 (US\$ Million)

Table 8 Global Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 9 Global Scroll Compressor Market Value, By Application, 2024, 2028 & 2032 (US\$ Million)

Table 10 Global Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Table 11 Global Scroll Compressor Market Value, By Region, 2024, 2028 & 2032 (US\$ Million)

Table 12 Global Scroll Compressor Market Value, By Region, 2023-2032 (US\$ Million)

Table 13 North America Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 14 North America Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 15 North America Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Table 16 North America Scroll Compressor Market Value, By Country, 2023-2032 (US\$ Million)

Table 17 Asia-Pacific Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 18 Asia-Pacific Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 19 Asia-Pacific Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Million)

Table 20 Asia-Pacific Scroll Compressor Market Value, By Country, 2023-2032 (US\$ Million)

Table 21 Europe Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 22 Europe Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 23 Europe Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Table 24 Europe Scroll Compressor Market Value, By Country, 2023-2032 (US\$ Million)

Table 25 South America Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 26 South America Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 27 South America Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Table 28 South America Scroll Compressor Market Value, By Country, 2023-2032 (US\$ Million)

Table 29 Middle East and Africa Scroll Compressor Market Value, By Stage, 2023-2032 (US\$ Million)

Table 30 Middle East and Africa Scroll Compressor Market Value, By Technology, 2023-2032 (US\$ Million)

Table 31 Middle East and Africa Scroll Compressor Market Value, By Application, 2023-2032 (US\$ Million)

Table 32 Middle East and Africa Scroll Compressor Market Value, By Country, 2023-2032 (US\$ Million)

Table 33 Mitsui Seiki Kogyo: Overview

Table 34 Mitsui Seiki Kogyo: Product Portfolio

Table 35 Mitsui Seiki Kogyo: Key Developments

Table 36 Siemens-Energy: Overview

Table 37 Siemens-Energy: Product Portfolio

Table 38 Siemens-Energy: Key Developments

Table 39 Hitachi Ltd.: Overview

Table 40 Hitachi Ltd.: Product Portfolio

Table 41 Hitachi Ltd.: Key Developments

Table 42 Panasonic Corporation: Overview

Table 43 Panasonic Corporation: Product Portfolio

Table 44 Panasonic Corporation: Key Developments

Table 45 Danfoss: Overview

Table 46 Danfoss: Product Portfolio

Table 47 Danfoss: Key Developments
Table 48 Atlas Copco: Overview
Table 49 Atlas Copco: Product Portfolio
Table 50 Atlas Copco: Key Developments
Table 51 Copeland LP.: Overview
Table 52 Copeland LP.: Product Portfolio
Table 53 Copeland LP.: Key Developments
Table 54 Ingersoll Rand: Overview
Table 55 Ingersoll Rand: Product Portfolio
Table 56 Ingersoll Rand: Key Developments
Table 57 BOGE Compressors: Overview
Table 58 BOGE Compressors: Product Portfolio
Table 59 BOGE Compressors: Key Developments
Table 60 Fujitsu General: Overview
Table 61 Fujitsu General: Product Portfolio
Table 62 Fujitsu General: Key Developments

List Of Figures

LIST OF FIGURES

- Figure 1 Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 2 Global Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)
- Figure 3 Global Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)
- Figure 4 Global Scroll Compressor Market Share, By Application, 2024 & 2032 (%)
- Figure 5 Global Scroll Compressor Market Share, By Region, 2024 & 2032 (%)
- Figure 6 Global Scroll Compressor Market Y-o-Y Growth, By Stage, 2024-2032 (%)
- Figure 7 Single-Stage Scroll Compressors Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 8 Two-Stage Scroll Compressors Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 9 Global Scroll Compressor Market Y-o-Y Growth, By Technology, 2024-2032 (%)
- Figure 10 Fixed-Speed Scroll Compressors Technology in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 11 Variable-Speed Scroll Compressors Technology in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 12 Digital Scroll Compressors Technology in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 13 Global Scroll Compressor Market Y-o-Y Growth, By Application, 2024-2032 (%)
- Figure 14 Air Conditioning Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 15 Refrigeration Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 16 Heat Pumps Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 17 Vacuum Pumps Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 18 Compressed Air Systems Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 19 Automotive Air Conditioning Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 20 Others Application in Global Scroll Compressor Market Value, 2023-2032 (US\$ Million)
- Figure 21 Global Scroll Compressor Market Y-o-Y Growth, By Region, 2024-2032 (%)

Figure 22 North America Scroll Compressor Market Value, 2023-2032 (US\$ Million)

Figure 23 North America Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)

Figure 24 North America Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)

Figure 25 North America Scroll Compressor Market Share, By Application, 2024 & 2032 (%)

Figure 26 North America Scroll Compressor Market Share, By Country, 2024 & 2032 (%)

Figure 27 Asia-Pacific Scroll Compressor Market Value, 2023-2032 (US\$ Million)

Figure 28 Asia-Pacific Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)

Figure 29 Asia-Pacific Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)

Figure 30 Asia-Pacific Scroll Compressor Market Share, By Application, 2024 & 2032 (%)

Figure 31 Asia-Pacific Scroll Compressor Market Share, By Country, 2024 & 2032 (%)

Figure 32 Europe Scroll Compressor Market Value, 2023-2032 (US\$ Million)

Figure 33 Europe Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)

Figure 34 Europe Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)

Figure 35 Europe Scroll Compressor Market Share, By Application, 2024 & 2032 (%)

Figure 36 Europe Scroll Compressor Market Share, By Country, 2024 & 2032 (%)

Figure 37 South America Scroll Compressor Market Value, 2023-2032 (US\$ Million)

Figure 38 South America Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)

Figure 39 South America Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)

Figure 40 South America Scroll Compressor Market Share, By Application, 2024 & 2032 (%)

Figure 41 South America Scroll Compressor Market Share, By Country, 2024 & 2032 (%)

Figure 42 Middle East and Africa Scroll Compressor Market Value, 2023-2032 (US\$ Million)

Figure 43 Middle East and Africa Scroll Compressor Market Share, By Stage, 2024 & 2032 (%)

Figure 44 Middle East and Africa Scroll Compressor Market Share, By Technology, 2024 & 2032 (%)

Figure 45 Middle East and Africa Scroll Compressor Market Share, By Application, 2024 & 2032 (%)

Figure 46 Mitsui Seiki Kogyo: Financials

Figure 47 Siemens-Energy: Financials

Figure 48 Hitachi Ltd.: Financials

Figure 49 Panasonic Corporation: Financials

Figure 50 Danfoss: Financials

Figure 51 Atlas Copco: Financials

Figure 52 Copeland LP.: Financials

Figure 53 Ingersoll Rand: Financials

Figure 54 BOGE Compressors: Financials

Figure 55 Fujitsu General: Financials

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