

# Global Air Cooled Chiller Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Air Cooled Chiller market size is expected to reach \$ 2826 million by 2032, rising at a market growth of 2.9% CAGR during the forecast period (2026-2032).

An air-cooled chiller is a refrigeration-based cooling unit that removes heat from a circulating process fluid (typically water or a water-glycol mix) and rejects that heat directly to the surrounding air using a condenser coil and fans. Inside the unit, the refrigerant absorbs heat from the process fluid in the evaporator, is compressed, then releases that heat in the air-cooled condenser before repeating the cycle; controls regulate leaving fluid temperature and protect the system with sensors and alarms. Air-cooled chillers are popular because they're self-contained and easier to install than water-cooled systems (no cooling tower), making them common for industrial process cooling and smaller to mid-sized HVAC loads where simplicity and lower infrastructure needs matter. Air-cooled chillers are often budgeted equipment-only at roughly ~\$600/ton (scroll) to ~\$800/ton (screw)—with commonly quoted new-unit ranges of ~\$3k–\$15k for 5–20 tons, ~\$15k–\$80k for 20–100 tons, and ~\$80k–\$250k+ for 100+ tons—while installed/project costs can rise to ~\$1k–\$3k+ per ton depending on scope.

Upstream, an air-cooled chiller is built from the same core refrigeration and heat-transfer supply base—compressor(s), fin-tube air-cooled condenser coil, evaporator heat exchanger, expansion valve, refrigerant and oil, plus fans/motors, pumps and reservoir (if packaged), filters/valves/piping, electrical gear (contactors, breakers, VFDs), sensors, and a controller/PLC—along with sheet-metal cabinet fabrication and testing/certification done by the chiller OEM and key component suppliers. Downstream, air-cooled chillers are sold through direct OEM channels, distributors, and HVAC/process contractors, then installed outdoors or in ventilated mechanical areas to serve process cooling (plastics, metalworking, laser, printing, chemical/pharma, food & beverage) and

commercial/industrial HVAC loads, with ongoing aftermarket demand driven by commissioning, coil cleaning, fan/compressor replacements, refrigerant leak repair/compliance, control upgrades, and service contracts focused on uptime and energy performance.

Air-cooled chillers remain the “default” choice wherever customers want fast deployment, lower site complexity, and minimal water infrastructure, which keeps them strong in general manufacturing and many commercial/industrial projects; at the same time, the segment is being reshaped by two big forces: (1) refrigerant transition and (2) data-center cooling architecture changes. On refrigerants, OEM roadmaps are accelerating because the EU’s revised F-gas regime is tightening quotas and restrictions (in force since March 11, 2024) and the U.S. AIM Act “Technology Transitions” restrictions begin phasing in from January 1, 2025, pushing product redesigns, safety engineering, and service practices as lower-GWP options expand in air-cooled portfolios.

This report studies the global Air Cooled Chiller production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air Cooled Chiller and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Air Cooled Chiller that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Air Cooled Chiller total production and demand, 2021-2032, (K Units)

Global Air Cooled Chiller total production value, 2021-2032, (USD Million)

Global Air Cooled Chiller production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Air Cooled Chiller consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Air Cooled Chiller domestic production, consumption, key domestic manufacturers and share

Global Air Cooled Chiller production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Air Cooled Chiller production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Air Cooled Chiller production by Application, production, value, CAGR,

2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Air Cooled Chiller market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bosch, Carrier, CustomChill, Daikin, Dimplex Thermal Solutions, DunAn, Dunham-Bush, Ebara, Guangzhou Teyu Electromechanical, Johnson Controls - Hitachi, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Air Cooled Chiller market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (USD/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Air Cooled Chiller Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Air Cooled Chiller Market, Segmentation by Type:

Outlet Temperature: -25? ~ -5?

Outlet Temperature: -25? ~ -45?

Outlet Temperature: Lower than -45?

Global Air Cooled Chiller Market, Segmentation by Compressor Technology:

Reciprocating

Centrifugal

Screw

Scroll

Global Air Cooled Chiller Market, Segmentation by System Configuration:

Packaged Air-cooled

Split Air-cooled

Modular Air-cooled

Global Air Cooled Chiller Market, Segmentation by Application:

Chemical

Pharmaceutical

Food and Beverage

Others

Companies Profiled:

Bosch

Carrier

CustomChill

Daikin

Dimplex Thermal Solutions

DunAn

Dunham-Bush

Ebara

Guangzhou Teyu Electromechanical

Johnson Controls - Hitachi

Legacy Chiller Systems

LG Electronics

Lytron Inc

Maruyama Chillers Corporation

Mirapro

Mitsubishi

Multistack

Parker Hannifin

Rexxam

SCY Chiller

Shinwa Controls

Smardt?Chiller?Group

SMC

Thermonics Chillers

TICA

Trane

WEXTEN

Whaley Products

**Key Questions Answered:**

1. How big is the global Air Cooled Chiller market?
2. What is the demand of the global Air Cooled Chiller market?
3. What is the year over year growth of the global Air Cooled Chiller market?
4. What is the production and production value of the global Air Cooled Chiller market?
5. Who are the key producers in the global Air Cooled Chiller market?
6. What are the growth factors driving the market demand?

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