

Global Retrofit Air Terminal Units Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Retrofit Air Terminal Units market size is expected to reach \$ 2047 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

In 2025, global Retrofit Air Terminal Units production reached approximately 550 K units, with an average global market price of around 2,450 US\$/unit.

Retrofit Air Terminal Units (RTUs) are specialized HVAC (Heating, Ventilation, and Air Conditioning) components designed to upgrade, replace, or modify existing air terminal units in commercial, industrial, or residential buildings without requiring full HVAC system overhauls. Unlike new-installation air terminal units, these retrofit units are engineered to be compatible with existing ductwork, control systems, and building structures, featuring compact designs, flexible mounting options, and adaptability to older HVAC infrastructure. They typically integrate air handling, temperature control, and airflow regulation functions, often incorporating energy-efficient components (such as variable air volume dampers, high-efficiency fans, and smart controls) to improve indoor air quality, reduce energy consumption, and enhance system performance. Retrofit Air Terminal Units are tailored to address the limitations of outdated units?such as poor energy efficiency, inadequate temperature control, or compatibility issues with modern building management systems?while minimizing installation time, disruption to building operations, and overall renovation costs.

The demand for Retrofit Air Terminal Units is driven by the global push for energy conservation, the aging of existing HVAC infrastructure in older buildings, and the growing need to improve indoor air quality and building energy efficiency. From the demand side, commercial buildings (offices, retail spaces, hospitals) and industrial facilities with outdated air terminal units seek retrofit solutions to meet stricter energy

efficiency standards and reduce operational costs; residential buildings undergoing energy upgrades also drive demand for compact, efficient retrofit units. Additionally, the trend toward smart building management systems and the need to enhance indoor air quality (post-pandemic) further fuel demand for retrofit units equipped with advanced controls and air purification features. In terms of business opportunities, developing energy-efficient, smart Retrofit Air Terminal Units compatible with a wide range of existing HVAC systems can address the core pain points of building owners. Providing customized retrofit solutions for different building types (commercial, industrial, residential) and offering turnkey installation and maintenance services can enhance market competitiveness. Cooperating with HVAC contractors, building renovation companies, and property management firms to expand distribution channels can capture market share. Furthermore, integrating IoT-enabled monitoring and remote control capabilities into retrofit units can improve product added value, while targeting emerging markets with aging building stock and growing energy conservation requirements can further expand market reach.

This report studies the global Retrofit Air Terminal Units production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Retrofit Air Terminal Units 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 Retrofit Air Terminal Units that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Retrofit Air Terminal Units total production and demand, 2021-2032, (K Units)

Global Retrofit Air Terminal Units total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Retrofit Air Terminal Units domestic production, consumption, key domestic manufacturers and share

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

Global Retrofit Air Terminal Units production by Unit Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Retrofit Air Terminal Units production by Application, production, value, CAGR,

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

This report profiles key players in the global Retrofit Air Terminal Units 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 Carrier, Greenheck, Daikin, Trane, Johnson Controls, Trox, Metalaire, Nailor Industries, Titus, Royal Service Air Conditioning, 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 Retrofit Air Terminal Units market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Unit 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 Retrofit Air Terminal Units Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Retrofit Air Terminal Units Market, Segmentation by Unit Type:

Single-Duct Type

Fan-Powered Type

Induction Type

Others

Global Retrofit Air Terminal Units Market, Segmentation by Air Volume Control Mode:

CAV Type

VAV Type

Pressure-Independent Type

Others

Global Retrofit Air Terminal Units Market, Segmentation by Control Method:

Pneumatic Type

Electronic Type

DDC/BMS-Integrated Type

Others

Global Retrofit Air Terminal Units Market, Segmentation by Application:

Commercial Buildings

Residential Buildings

Industrial Buildings

Public Infrastructure

Others

Companies Profiled:

Carrier

Greenheck

Daikin

Trane

Johnson Controls

Trox

Metalaire

Nailor Industries

Titus

Royal Service Air Conditioning

Barcol Air

Price Industries

Krueger

Prime AC Industries

Leminar Industries

Halton

ENVIRO-TEC

Carnes

Key Questions Answered:

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

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