

U.S. HVAC Rooftop Units Market Size, Share & Trends Analysis Report By Capacity (Up To 3 Tons), By Distribution Channel (New Installation), By Application (Residential), And Segment Forecasts, 2024 - 2030

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Abstracts

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U.S. HVAC Rooftop Units Market Growth & Trends

The U.S. HVAC rooftop units market is anticipated to reach USD 12,632.7 million by 2030, registering a CAGR of 4.8% from 2024 to 2030, according to a new report by Grand View Research, Inc. Rising construction spending in the U.S. coupled with the maintenance & replacement operations related to HVAC rooftop units is anticipated to fuel the demand for energy-efficient heating. The U.S. construction industry focuses on the development of sustainable and energy-efficient buildings. Leadership in Energy and Environmental Design (LEED) is a green building certification system developed by the U.S. Green Building Council (USGBC) that focuses on increasing energy consumption to lessen the environmental impact of excessive energy usage. These factors are expected to drive the demand for HVAC rooftop units in the U.S.

The U.S. HVAC rooftop unit market is witnessing a high demand from the commercial sector for various applications such as retail stores, restaurants, warehouses, and healthcare. Further, there is a high demand for integrated solutions to control different parameters, such as temperature, humidity, airflow, and more, remotely and from various devices. Several companies are developing solutions that offer integrated control of HVAC equipment throughout the building. The U.S. HVAC rooftop units (RTUs) market is expected to increase sales due to the availability of tax credits and rebate programs associated with purchasing energy-efficient systems.

To improve the efficiency of HVAC rooftop units, various governments in the U.S., including federal and state levels, have implemented regulations such as the U.S. Department of Energy (DoE) energy conservation guidelines.

These regulations are designed to encourage the production of energy-efficient appliances while minimizing environmental risks and carbon emissions. The surging demand for replacement equipment is significantly propelling the market for HVAC rooftop units. As older systems reach the end of their operational life, industries and building owners look to upgrade to more efficient, modern units that offer better performance, energy savings, and compliance with current environmental regulations. This can be a key opportunity for the market, as it not only involves direct replacement of outdated equipment but also encourages the adoption of advanced technologies that offer superior control, integration, and sustainability features.

Manufacturers of U.S. HVAC rooftop units are adopting several strategies, such as acquisitions, mergers, joint ventures, new product launches, and geographical expansion, to enhance market penetration and cater to changing technological demands from various end-use applications, including residential, commercial, and industrial applications. For instance, in May 2024, Lennox International, Inc. unveiled its new series of HVAC offerings with a low global warming potential (GWP), highlighting its commitment to sustainability, adaptability, and high-quality performance. This residential collection will feature the eco-friendly R-454B refrigerant in Lennox-brand heat pumps and air conditioners. For the commercial sector, the entire range of rooftop units and ducted splits, including the prestigious Model L and Enlight series, will come equipped with R-454 B refrigerant.

U.S. HVAC Rooftop Units Market Report Highlights

The 3 to 7-ton segment is expected to show lucrative growth over the forecast period. One of the primary advantages of 3 to 7-ton RTUs is the balance between capacity and efficiency. These units are powerful enough to effectively manage the climate control needs of medium-sized buildings while maintaining energy efficiency.

The replacement segment held the largest share of the overall revenue in 2023. There is a strong emphasis on reducing the environmental impact of HVAC systems.

Regulations aimed at phasing out refrigerants with high global warming potential (GWP) are driving the need to replace older RTUs

The commercial segment held the largest share of the overall revenue in 2023. Construction activity in the commercial sector is rising due to the increasing demand for various facilities such as offices, hospitals, shopping malls, retail stores, hospitality venues, restaurants, banks, convenience stores, supermarkets, public buildings, and business centers. Thus, the growing commercial sector and the rising adoption of HVAC rooftop units are anticipated to drive the market in the coming years

California dominated the market. For example, California's Title 24 Building Energy Efficiency Standards emphasize using high-efficiency HVAC units to reduce energy consumption in residential and commercial buildings, boosting the demand for efficient rooftop units designed to meet these criteria. Similarly, in New York, the Climate Mobilization Act encourages the use of energy-efficient rooftop HVAC systems to achieve significant reductions in greenhouse gas emissions

In October 2023, AAON introduced the AAON Alpha Class, a range of high-performance air-source heat pumps. These offerings are designed to speed up the use of cleaner and more efficient technologies while supporting reducing carbon emissions. The heat pumps are offered in a wide variety of sizes, ranging from 2 to 70 tons, providing great flexibility

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