

U.S. Modular Chillers Market Size, Share & Trends Analysis Report By Product (Water Cooled, Air Cooled), By End-use (Commercial, Industrial, Residential), By Application (Cooling, Simultaneous Heating & Cooling, Heat Pump), And Segment Forecasts, 2025 - 2035

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Abstracts

U.S. Modular Chillers Market Growth & Trends

The U.S. modular chillers market size is anticipated to reach USD 667.1 million by 2035 and is projected to grow at a CAGR of 5.3% from 2025 to 2035, according to a new report by Grand View Research, Inc. The market is experiencing a significant transformation, driven by the increasing demand for energy-efficient and scalable cooling solutions. Modular chillers offer flexibility in capacity and installation, making them ideal for commercial, industrial, and residential applications. This adaptability aligns with the evolving needs of modern infrastructure, where phased installations and future scalability are essential.

According to the U.S. Census Bureau, non-residential commercial construction spending has increased by nearly 7% in 2024 compared to 2023, with manufacturing projects seeing a significant 23% growth. In addition, substantial investments continue to pour into data centers, which are crucial for housing computer systems and servers for data storage and processing. For example, Meta recently announced a USD 5 billion investment in a data center project in rural Louisiana. This surge in construction spending, particularly in manufacturing and data centers, is driving increased demand for modular chillers. Both sectors require efficient, high-capacity cooling solutions to maintain optimal operational conditions, which is further boosting the growth of the

modular chillers market as companies invest in infrastructure to support these temperature-sensitive environments.

Technological advancements play a crucial role in shaping the market dynamics. The integration of smart controls, IoT capabilities, and automation enhances operational efficiency and facilitates real-time monitoring, predictive maintenance, and remote control. These innovations not only optimize performance but also align with the broader industry movement toward digital transformation. As industries adopt smarter systems, the ability to remotely control and monitor chiller performance becomes increasingly critical, enhancing operational efficiency and reducing downtime.

The market is also influenced by environmental considerations and regulatory pressures. There is a growing emphasis on sustainability, with industries seeking cooling solutions that minimize environmental impact. Modular chillers, often utilizing eco-friendly refrigerants and energy-efficient technologies, are well-positioned to meet these demands. Compliance with stringent environmental regulations further drives the adoption of these systems, as businesses aim to align with green building standards and reduce their carbon footprint.

U.S. Modular Chillers Market Report Highlights

Based on product, the water-cooled product segment led the market in 2024 as it offers enhanced energy efficiency using water as a cooling medium, making it ideal for applications in larger buildings or industrial settings.

Based on end use, the commercial end use segment led the market in 2024 as it provides scalable, energy-efficient cooling solutions for office buildings, retail spaces, and hotels, adapting to varying cooling demands.

Based on application, the cooling application segment led the market in 2024 as these are commonly used in cooling applications such as HVAC systems, industrial processes, data centers, and large-scale commercial buildings, offering flexibility and energy efficiency.

In February 2025, Mechanical partnered with ChillMaster to expand its modular chiller offerings. This collaboration allows ACI Mechanical to provide a broader range of energy-efficient, scalable, and reliable modular chillers to its customers. By integrating ChillMaster's advanced modular chiller technology, ACI Mechanical aimed to enhance its HVAC solutions for commercial and industrial

projects, delivering flexible and sustainable cooling systems that meet diverse application needs. This partnership strengthens both companies' market presence and supports growing demand for modular, efficient cooling solutions.

Companies Mentioned

Trane (Trane Technologies plc)
The Climate Control Group, Inc
Carrier
Daikin Industries, Ltd.
Robert Bosch GmbH
ChillMaster (AMERICAN GEOTHERMAL)
Envirosep, Inc
Jetson
AERMEC S.P.A.
Multistack, LLC
WaterFurnace

Contents

CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation and Scope
- 1.2. Market Definitions
- 1.3. Research Methodology
- 1.4. Information Procurement
 - 1.4.1. Purchased Database
 - 1.4.2. GVR's Internal Database
 - 1.4.3. Secondary Sources
 - 1.4.4. Third Party Perspective
 - 1.4.5. Information Analysis
- 1.5. Information Analysis
 - 1.5.1. Data Analysis Models
 - 1.5.2. Market Formulation & Data Visualization
 - 1.5.3. Data Validation & Publishing
- 1.6. Research Scope and Assumptions
 - 1.6.1. List of Data Sources

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Outlook
- 2.2. Segment Outlook
- 2.3. Competitive Insights

CHAPTER 3. U.S. MODULAR CHILLERS MARKET VARIABLES, TRENDS, & SCOPE

- 3.1. Market Concentration & Growth Prospect Mapping
- 3.2. Industry Value Chain Analysis
- 3.3. Technology Overview
- 3.4. Regulatory Framework
- 3.5. Market Dynamics
 - 3.5.1. Market Drivers Analysis
 - 3.5.2. Market Restraints Analysis
 - 3.5.3. Market Opportunity Analysis
 - 3.5.4. Market Challenge Analysis
- 3.6. Pricing Analysis

3.7. U.S. Modular Chillers Market Analysis Tools

3.7.1. Porter's Analysis

3.7.1.1. Bargaining power of the suppliers

3.7.1.2. Bargaining power of the buyers

3.7.1.3. Threats of substitution

3.7.1.4. Threats from new entrants

3.7.1.5. Competitive rivalry

3.7.2. PESTEL Analysis

3.7.2.1. Political landscape

3.7.2.2. Economic and Social landscape

3.7.2.3. Technological landscape

3.7.2.4. Environmental landscape

3.7.2.5. Legal landscape

3.8. Economic Mega Trend Analysis

3.9. Potential Disruption to World Trade Due to the Imposition of Tariffs

3.10. Increased Manufacturing Costs & Supply Chain Disruptions

CHAPTER 4. U.S. MODULAR CHILLERS MARKET: PRODUCT ESTIMATES & TREND ANALYSIS

4.1. Segment Dashboard

4.2. U.S. Modular Chillers Market: Product Movement Analysis, 2024 & 2035 (USD Million)

4.3. Water Cooled

4.3.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

4.3.2. Market Estimates and Forecasts, By Capacity, 2018 - 2035 (USD Million)

4.4. Air Cooled

4.4.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

4.4.2. Market Estimates and Forecasts, By Capacity, 2018 - 2035 (USD Million)

CHAPTER 5. U.S. MODULAR CHILLERS MARKET: END USE ESTIMATES & TREND ANALYSIS

5.1. Segment Dashboard

5.2. U.S. Modular Chillers Market: End use Movement Analysis, 2024 & 2035 (USD Million)

5.3. Commercial

5.3.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

5.3.2. Market Estimates and Forecasts, By Commercial Application, 2018 - 2035 (USD Million)

Million)

5.4. Industrial

5.4.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

5.4.2. Market Estimates and Forecasts, By Industrial Application, 2018 - 2035 (USD Million)

5.5. Residential

5.5.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

CHAPTER 6. U.S. MODULAR CHILLERS MARKET: APPLICATION ESTIMATES & TREND ANALYSIS

6.1. Segment Dashboard

6.2. U.S. Modular Chillers Market: Application Movement Analysis, 2024 & 2035 (USD Million)

6.3. Cooling

6.3.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

6.4. Heat Recovery

6.4.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

6.5. Heat Pump

6.5.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

6.6. Simultaneous Heating And Cooling

6.6.1. Market Estimates and Forecasts, 2018 - 2035 (USD Million)

CHAPTER 7. COMPETITIVE LANDSCAPE

7.1. Recent Developments & Impact Analysis by Key Market Participants

7.2. Company Categorization

7.3. Company Market Positioning

7.4. Company Market Share Analysis, 2024

7.5. Company Heat Map Analysis, 2024

7.6. Strategy Mapping

7.7. Company Profiles

7.7.1. Trane

7.7.1.1. Participant's Overview

7.7.1.2. Financial Performance

7.7.1.3. Product Benchmarking

7.7.1.4. Strategic Initiatives

7.7.2. The Climate Control Group, Inc.

7.7.2.1. Participant's Overview

- 7.7.2.2. Financial Performance
- 7.7.2.3. Product Benchmarking
- 7.7.2.4. Strategic Initiatives
- 7.7.3. Carrier
 - 7.7.3.1. Participant's Overview
 - 7.7.3.2. Financial Performance
 - 7.7.3.3. Product Benchmarking
 - 7.7.3.4. Strategic Initiatives
- 7.7.4. DAIKIN INDUSTRIES Ltd.
 - 7.7.4.1. Participant's Overview
 - 7.7.4.2. Financial Performance
 - 7.7.4.3. Product Benchmarking
 - 7.7.4.4. Strategic Initiatives
- 7.7.5. Robert Bosch GmbH
 - 7.7.5.1. Participant's Overview
 - 7.7.5.2. Financial Performance
 - 7.7.5.3. Product Benchmarking
 - 7.7.5.4. Strategic Initiatives
- 7.7.6. ChillMaster (AMERICAN GEOTHERMAL)
 - 7.7.6.1. Participant's Overview
 - 7.7.6.2. Financial Performance
 - 7.7.6.3. Product Benchmarking
 - 7.7.6.4. Strategic Initiatives
- 7.7.7. Envirosep, Inc
 - 7.7.7.1. Participant's Overview
 - 7.7.7.2. Financial Performance
 - 7.7.7.3. Product Benchmarking
 - 7.7.7.4. Strategic Initiatives
- 7.7.8. Jetson (MODINE MANUFACTURING COMPANY)
 - 7.7.8.1. Participant's Overview
 - 7.7.8.2. Financial Performance
 - 7.7.8.3. Product Benchmarking
 - 7.7.8.4. Strategic Initiatives
- 7.7.9. AERMEC S.P.A. (Giordano Riello International Group S.p.A.)
 - 7.7.9.1. Participant's Overview
 - 7.7.9.2. Financial Performance
 - 7.7.9.3. Product Benchmarking
 - 7.7.9.4. Strategic Initiatives
- 7.7.10. Multistack, LLC

- 7.7.10.1. Participant's Overview
- 7.7.10.2. Financial Performance
- 7.7.10.3. Product Benchmarking
- 7.7.10.4. Strategic Initiatives
- 7.7.11. WaterFurnace
 - 7.7.11.1. Participant's Overview
 - 7.7.11.2. Financial Performance
 - 7.7.11.3. Product Benchmarking
 - 7.7.11.4. Strategic Initiatives

List Of Tables

LIST OF TABLES

Table 1 High-Rise Buildings Across The U.S.

Table 2 Water Property Limits

Table 3 U.S. Modular Chillers Market Estimates & Forecasts, By Product, 2018 - 2026 (USD Million)

Table 4 U.S. Modular Chillers Market Estimates & Forecasts, By Product, 2027 - 2035 (USD Million)

Table 5 Water Cooled Modular Chillers Market Estimates & Forecasts, By Capacity, 2018 - 2026 (USD Million)

Table 6 Water Cooled Modular Chillers Market Estimates & Forecasts, By Capacity, 2027 - 2035 (USD Million)

Table 7 Air Cooled Modular Chillers Market Estimates & Forecasts, By Capacity, 2018 - 2026 (USD Million)

Table 8 Air Cooled Modular Chillers Market Estimates & Forecasts, By Capacity, 2027 - 2035 (USD Million)

Table 9 U.S. Modular Chillers Market Estimates & Forecasts, By End Use, 2018 - 2026 (USD Million)

Table 10 U.S. Modular Chillers Market Estimates & Forecasts, By End Use, 2027 - 2035 (USD Million)

Table 11 U.S. Modular Chillers Market Estimates & Forecasts, By Commercial End Use, 2018 - 2026 (USD Million)

Table 12 U.S. Modular Chillers Market Estimates & Forecasts, By Commercial End Use, 2027 - 2035 (USD Million)

Table 13 U.S. Modular Chillers Market Estimates & Forecasts, By Industrial End Use, 2018 - 2026 (USD Million)

Table 14 U.S. Modular Chillers Market Estimates & Forecasts, By Industrial End Use, 2027 - 2035 (USD Million)

Table 15 U.S. Modular Chillers Market Estimates & Forecasts, By Application, 2018 - 2026 (USD Million)

Table 16 U.S. Modular Chillers Market Estimates & Forecasts, By Application, 2027 - 2035 (USD Million)

Table 17 Recent Developments & Impact Analysis, By Key Market Participants

Table 18 Company Heat Map Analysis, 2024

Table 19 Key Companies: Product Launches

Table 20 Key Companies: Mergers & Acquisitions

Table 21 Key Companies: Collaborations/Partnerships

List Of Figures

LIST OF FIGURES

- Fig. 1 Market Segmentation & Scope
- Fig. 2 Information Procurement
- Fig. 3 Data Analysis Models
- Fig. 4 Market Formulation And Validation
- Fig. 5 Data Validating & Publishing
- Fig. 6 Market Snapshot
- Fig. 7 Product & End Use Segment Snapshot
- Fig. 8 Application Segment Snapshot
- Fig. 9 Competitive Landscape Snapshot
- Fig. 10 Concentration And Growth Prospect Mapping
- Fig. 11 U.S. Modular Chillers - Value Chain Analysis
- Fig. 12 Market Dynamics
- Fig. 13 Market Driver Analysis
- Fig. 14 Share for Construction Spending for Manufacturing, Warehouses and Data Centers, 2019 - 2024 (%)
- Fig. 15 Market Restraint Analysis
- Fig. 16 U.S. Health Expenditure, 2018 - 2023 (USD Billion)
- Fig. 17 Behavior of Key Economic Indicators 2018 - 2024 (%)
- Fig. 18 U.S. Modular Chillers: PORTER's Analysis
- Fig. 19 U.S. Modular Chillers: PESTEL Analysis
- Fig. 20 U.S. Modular Chillers, By Product: Key Takeaways
- Fig. 21 U.S. Modular Chillers: Product Movement Analysis & Market Share, 2024 & 2035
- Fig. 22 Water-Cooled Modular Chillers Market Estimates & Forecasts, 2018 - 2035 (USD Million)
- Fig. 23 Water-Cooled Modular Chillers Market Estimates & Forecasts, By 301 kW, 2018 - 2035 (USD Million)
- Fig. 28 Air-Cooled Modular Chillers Market Estimates & Forecasts, 2018 - 2035 (USD Million)
- Fig. 29 Air-Cooled Modular Chillers Market Estimates & Forecasts, By 301 kW, 2018 - 2035 (USD Million)
- Fig. 34 U.S. Modular Chillers, By End Use: Key Takeaways
- Fig. 35 U.S. Modular Chillers: End Use Movement Analysis & Market Share, 2024 & 2035
- Fig. 36 U.S. Modular Chillers Market Estimates & Forecasts In Commercial, 2018 -

2035 (USD Million)

Fig. 37 Total Commercial Construction Spending In The U.S., Monthly, Seasonally Adjusted Annual Rate, January 2020 - January 2025 (USD Million)

Fig. 38 U.S. Modular Chillers Market Estimates & Forecasts, In Corporate Offices, 2018 - 2035 (USD Million)

Fig. 39 U.S. Modular Chillers Market Estimates & Forecasts, In Data Centers, 2018 - 2035 (USD Million)

Fig. 40 U.S. Modular Chillers Market Estimates & Forecasts, In Public Buildings, 2018 - 2035 (USD Million)

Fig. 41 U.S. Modular Chillers Market Estimates & Forecasts, In Mercantile & Service, 2018 - 2035 (USD Million)

Fig. 42 U.S. Modular Chillers Market Estimates & Forecasts, In Healthcare, 2018 - 2035 (USD Million)

Fig. 43 Total Healthcare Construction Spending In The U.S., (USD Million), Monthly, Seasonally Adjusted, January 2024 - January 2025

Fig. 44 U.S. Modular Chillers Market Estimates & Forecasts, In Other Commercial End Use, 2018 - 2035 (USD Million)

Fig. 45 U.S. Modular Chillers Market Estimates & Forecasts, In Industrial, 2018 - 2035 (USD Million)

Fig. 46 U.S. Modular Chillers Market Estimates & Forecasts, In Chemical, 2018 - 2035 (USD Million)

Fig. 47 Industrial Modular Chillers Market Estimates & Forecasts, In Food & Beverage, 2018 - 2035 (USD Million)

Fig. 48 Total Number Of Establishments In Food Services And Drinking Places, Q4 2023- Q3 2024 (Units)

Fig. 49 U.S. Modular Chillers Market Estimates & Forecasts, In Metal Manufacturing & Machining, 2018 - 2035 (USD Million)

Fig. 50 U.S. Modular Chillers Market Estimates & Forecasts, In Medical & Pharmaceutical, 2018 - 2035 (USD Million)

Fig. 51 U.S. Modular Chillers Market Estimates & Forecasts, In Plastics, 2018 - 2035 (USD Million)

Fig. 52 U.S. Modular Chillers Market Estimates & Forecasts, In Other Industrial End Use, 2018 - 2035 (USD Million)

Fig. 53 U.S. Modular Chillers Market Estimates & Forecasts, In Residential, 2018 - 2035 (USD Million)

Fig. 54 Total Residential Construction In The U.S., January 2020 - January 2025 (USD Million)

Fig. 55 U.S. Modular Chillers, By Application Key Takeaways

Fig. 56 U.S. Modular Chillers: Application Movement Analysis & Market Share, 2024 &

2035

Fig. 57 U.S. Modular Chillers Market Estimates & Forecasts, In Cooling, 2018 - 2035 (USD Million)

Fig. 58 U.S. Modular Chillers Market Estimates & Forecasts, In Heat Recovery, 2018 - 2035 (USD Million)

Fig. 59 U.S. Modular Chillers Market Estimates & Forecasts, In Heat Pump, 2018 - 2035 (USD Million)

Fig. 60 Scroll Chiller Market Estimates & Forecasts, In Simultaneous Heating And Cooling, 2018 - 2035 (USD Million)

Fig. 61 Key Company Categorization

Fig. 62 Company Market Share Analysis, 2024

Fig. 63 Company Market Positioning

Fig. 64 Strategic Framework

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