

# Central Air Conditioning Systems – A European Market Overview

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## Abstracts

### European Central Air Conditioning Systems Market Trends and Outlook

The European Central Air Conditioning Systems production experienced a notable decline in 2020, largely due to the COVID-19 pandemic, which disrupted new construction and renovation activities across the European Union. However, the industry rebounded sharply in 2021, driven by a recovery in commercial and residential construction and government-backed renovation initiatives. By 2024, European unit shipments of Central Air Conditioning Systems by domestic producers reached an estimated 2.85 million units, up from 2.7 million units in 2020, reflecting a modest CAGR of 1% during the 2020-2024 period. The shipment value of these systems grew to US\$8.1 billion in 2024, registering a more robust CAGR of 4.5% over the same period.

Production of DX (Direct Expansion) AC Systems, fueled by significant growth in VRF (Variable Refrigerant Flow) systems and heat pumps, increased at an impressive CAGR of 3.9% during 2020-2024, while Central Plant Systems (chillers, AHUs, fan coil units) saw stagnation with a slight decline at a CAGR of -0.6%.

The impact of COVID-19 heightened safety concerns and the demand for quality indoor air, further boosting the adoption of VRF systems in Europe. Markets like France, Italy, Spain, and Turkey are leading this growth, driven by the high energy efficiency and adaptability of VRF systems to different building zones and needs. These systems have become the preferred choice for high-rise residential buildings and commercial applications. However, Northern European countries still lag in adoption.

Heat pumps are also witnessing a surge in production and demand, fueled by rising energy prices and the need to reduce reliance on Russian gas. Between 2021 and

2023, heat pump production in Europe grew significantly, increasing by 29% in 2021, 10% in 2022, and 18% in 2023. France, Germany, and Italy lead the market in terms of production and adoption.

Between 2024 and 2030, unit shipments of Central Air Conditioning Systems by European producers are projected to grow at a CAGR of 2.4%, reaching 3.3 million units by 2030. DX AC Systems will lead this growth, with a corresponding CAGR of 3.3% during the forecast period. In terms of value, the European market for Central Air Conditioning Systems is anticipated to reach US\$10.2 billion by 2030, growing at a CAGR of 3.8%.

Major companies operating in the European Central Air Conditioning Systems market include Aermec, Ariston Group, BDR Thermea, Bosch Thermotechnology, Carrier, Daikin, FlaktGroup, GEA Group, Groupe Atlantic, Hitachi Europe, Johnson Controls, Mitsubishi Electric, NIBE Group, Stiebel Eltron, Trane Technologies, Vaillant Group, and Viessmann Group among others.

#### European Central Air Conditioning Systems Regional Market Analysis

Countries covered in the European Central Air Conditioning Systems market include Czech Republic, Denmark, Finland, France, Germany, Italy, Russia, Spain, Turkiye, and the United Kingdom. With a share of 35.5% in 2024, Italy is the leading producer of Central Air Conditioning Systems in Europe in terms of volume shipments and slated to record a CAGR of 1.2% between 2024 and 2030. Germany and France are the other leading countries for the production of Central Air Conditioning Systems in Europe. Production of Central Air Conditioning Systems in Turkey, Czech Republic and Poland is projected to post fastest 2024-2030 CAGRs in excess of 3.3% each, attributed to ongoing investments to boost production of heat pumps and VRF systems in these countries.

#### European Central Air Conditioning Systems Market Analysis by Product Segment

The market for European Central Air Conditioning Systems by product segment analyzed in this report include DX AC Systems and Central Plant AC Systems. DX AC Systems are further segmented into Split AC Systems, Packaged AC Systems, VRF Systems, and Heat Pumps; and Central Plant AC Systems are further categorized into Chillers, Air Handling Units, Fan Coil Units, and Cooling Towers. Central Plant Systems segment is largest in terms of volume shipments in the European Central Air Conditioning Systems market with a share of 60% in 2024 and is anticipated to post a

CAGR of 1.8% between 2024 and 2030 in reaching 1.9 million units by 2030. Among Central Plant Systems, Fan Coil Units corner the largest share in terms of volume shipments, estimated at 76.7% in 2024, followed distantly by Air Handling Units. Heat Pumps are the largest segment with respect to volume shipments in Europe, estimated at 63.6% of the total DX AC Systems shipments in 2024 and also projected to post the fastest CAGR of 4.4% during 2024 to 2030 period and reach over 930k units by 2030.

## European Central Air Conditioning Systems Market Report Scope

This European Central Air Conditioning Systems report analyzes the market size based on unit shipments by Central Air Conditioning Systems manufacturers. This market report analyzes Central Air Conditioning Systems unit shipments and value by product segment, sub-segment and country for the period 2021-2030 with projection from 2024 to 2030. In addition to providing profiles of major companies operating in the European CAC industry, the latest corporate and industrial developments have been covered to offer a clear panorama of European CAC industry.

### Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Volume Shipments in units and Value market in US\$

Companies Mentioned: 75+

## European Central Air Conditioning Systems Market by Country

Czech Republic

Denmark

Finland

France

Germany

Italy

Russia

Spain

Turkiye

The United Kingdom

Rest of Europe

## European Central Air Conditioning Systems Market by Product Segment

DX AC Systems

Split AC Systems

Packaged AC Systems

VRF Systems

Heat Pumps

Central Plant AC Systems

Chillers

Air Handling Units

Fan Coil Units

Cooling Towers

## Contents

### 1. INTRODUCTION

#### PRODUCT SEGMENTATION

Central Air Conditioning (CAC) Systems

Direct Expansion (DX) Central Air Conditioning Systems

Components of DX Central Air Conditioning Systems

Evaporator

Compressor

Expansion Valve

DX AC Systems Equipment Types

Packaged Central Air Conditioning Systems

Split System Central Air Conditioning

Ductless Multi-Split CACs

Variable Refrigerant Flow (VRF) Systems

Heat Pumps

Central Plant/Chilled Water Central Air Conditioning Systems

Components of Central Plant/Chilled Water Air Conditioning Systems

Chiller (Central Plant)

Air Handling Units or Fan Coil Units

Air Ducts

Cooling Tower

Central Plant AC Systems Equipment Types

Chillers

Reciprocating Chillers

Screw Chillers

Centrifugal Chillers

Absorption Chillers

Cooling Towers

Air Handling Units

Fan Coil Units

### 3. ENERGY EFFICIENCY STANDARDS

### 4. KEY MARKET TRENDS

### 5 KEY EUROPEAN PLAYERS

Aermec SPA

Airwell Group

Ariston Group

BDR Thermea Group

Bosch Thermotechnology

Carrier Global Corporation  
Daikin Europe NV  
Delonghi SPA  
Eaton-Williams Group Limited  
Flaktgroup  
GEA Group  
Groupe Atlantic  
Hitachi Europe Limited  
Johnson Controls (York)  
Midea Europe GmbH  
Mitsubishi Electric Europe B.V.  
Mitsubishi Heavy Industries Europe Ltd  
NIBE Group  
Panasonic Europe Ltd  
Remko GmbH & Co. Kg  
Stiebel Eltron GmbH & Co. Kg  
Swegon AB  
Trane Technologies Plc  
Vaillant Group

## 6. KEY BUSINESS AND PRODUCT TRENDS

### 7. EUROPEAN MARKET OVERVIEW

#### CAC Shipment Analysis by Geographic Region

Unit Shipments

Shipment Value

#### Shipment Analysis by CAC Major Segments

Unit Shipments

Shipment Value

#### Shipment Analysis by DX AC Systems Sub-Segments

Unit Shipments

Shipment Value

#### Shipment Analysis by Central Plant Systems Sub-Segments

Unit Shipments

Shipment Value

## 8. REGIONAL MARKET PERSPECTIVE

### CZECH REPUBLIC

#### Shipment Analysis by CAC Major Segments

Unit Shipments

Shipment Value

#### Shipment Analysis by DX AC Sub-Segments

Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
DENMARK  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
FINLAND  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
FRANCE  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
GERMANY  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value

Shipment Analysis by DX AC Sub-Segments

Unit Shipments

Shipment Value

Shipment Analysis by Central Plant AC Sub-Segments

Unit Shipments

Shipment Value

ITALY

Shipment Analysis by CAC Major Segments

Unit Shipments

Shipment Value

Shipment Analysis by DX AC Sub-Segments

Unit Shipments

Shipment Value

Shipment Analysis by Central Plant AC Sub-Segments

Unit Shipments

Shipment Value

RUSSIA

Shipment Analysis by CAC Major Segments

Unit Shipments

Shipment Value

Shipment Analysis by DX AC Sub-Segments

Unit Shipments

Shipment Value

Shipment Analysis by Central Plant AC Sub-Segments

Unit Shipments

Shipment Value

SPAIN

Shipment Analysis by CAC Major Segments

Unit Shipments

Shipment Value

Shipment Analysis by DX AC Sub-Segments

Unit Shipments

Shipment Value

Shipment Analysis by Central Plant AC Sub-Segments

Unit Shipments

Shipment Value

TURKEY

Shipment Analysis by CAC Major Segments

Unit Shipments



Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
**THE UNITED KINGDOM**  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
**REST OF EUROPE**  
Shipment Analysis by CAC Major Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by DX AC Sub-Segments  
Unit Shipments  
Shipment Value  
Shipment Analysis by Central Plant AC Sub-Segments  
Unit Shipments  
Shipment Value  
**9. INDUSTRY GUIDE**  
**10. ANNEXURE**  
Research Methodology  
Feedback

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