

# Heat Pumps (Heating, Cooling and Hot Water) - A Global Market Overview

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## Abstracts

Bolstered by increasing consumer preference for more environmental friendly and energy efficiency, the demand for heat pumps is anticipated to grow at a robust rate. The phenomenon is well backed by energy policies, regulations and incentives by the government. Among various types of heat pump technologies, gas driven, hybrid and Co2 heat pumps are expected to gain the market share in the coming years. Since CO2 heat pumps offer a climate and ozone friendly and energy efficient technology alternative, demand for these heat pumps has been witnessing an increase across the residential and commercial sectors. Gas heat pumps (GHPs) offer an eco-friendly alternative for heating and cooling in commercial, industrial and residential buildings, with the capability of achieving up to 150% efficiency.

Heat pump types analyzed, for space cooling, space heating and sanitary hot water heating, in this study include air to air, air to water and ground source heat pumps. The global heat pumps market is estimated at 58.3 million units in 2013 and forecasted to grow at a 2014-20 CAGR of 10.6%. The heat pumps market worldwide is further projected to reach 116.9 million units by 2020. In terms of value, global demand for heat pumps is anticipated to reach a projected US\$116.6 billion by 2020 from an estimated US\$56.9 billion in 2013. Sales of air to water heat pumps were the fastest growing segment at a CAGR of 21.5% over 2007-2010, reaching 1.3 million units in 2010 from an estimated 730 thousand units in 2007. Further, volume sales of air to water heat pumps are likely to surpass the other heat pump categories by registering a 2014-2020 compounded annual growth rate of 13.6% in regions such as the United States and China.

The report reviews, analyses and projects the heat pumps market for global and the regional markets including North America, Europe and Asia-Pacific. The regional

markets further analyzed for 23 independent countries across North America – The United States and Canada; Europe – Austria, Belgium, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, The Netherlands, Norway, Poland, Spain, Sweden, Switzerland, The United Kingdom and Rest of Europe; and Asia-Pacific – China, Japan, South Korea, Australia and Rest of Asia-Pacific.

This 500 pages most comprehensive global report on Heat Pumps market includes 273 charts (includes a data table and graphical illustration for each chart), supported with meaningful and easy to understand graphical presentation of market numbers. The statistical tables represent the data for the global heat pumps market volume in units and value in USD by geographic region and heat pump type. The report profiles 42 key global players and 156 major players across North America – 30; Europe – 100; and Asia-Pacific – 26. The report also provides the listing of the companies engaged in the manufacturing and supply of heat pumps. The global list of companies covers addresses, contact numbers and the website addresses of 418 companies.

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AERMEC S.p.A.  
AIRWELL GROUP  
BDR THERMEA GROUP B.V.  
BERLINERLUFT TECHNIK GmbH  
BOSCH THERMOTECHNIK GmbH  
CALOREX HEAT PUMPS LTD  
CARRIER CORPORATION  
CIAT (CIE INDUSTRIELLE APPLICATIONS THERMIQU) GROUP  
DAIKIN INDUSTRIES LTD.  
DANFOSS A/S  
DELCLIMA S.P.A  
DENSO CORPORATION  
ENERTECH GROUP LTD.  
FUJITSU GENERAL LIMITED  
GLEN DIMPLEX GROUP  
GREE Electric Appliances Inc.  
HAIER Group  
HITACHI APPLIANCES, INC.  
INGERSOLL-RAND PLC (TRANE)  
JOHNSON CONTROLS, INC.  
LENNOX INTERNATIONAL INC.  
LG ELECTRONICS, INC.  
LSB INDUSTRIES, INC.  
MAYEKAWA MANUFACTURING CO., LTD.  
MIDEA GROUP  
MITSUBISHI ELECTRIC CORPORATION  
MODINE MANUFACTURING COMPANY  
NIBE INDUSTRIER AB  
NORDYNE INC  
PANASONIC CORPORATION  
RHEEM MANUFACTURING COMPANY  
RIELLO S.p.A.  
SAMSUNG ELECTRONICS CO. LTD.  
SANDEN CORPORATION  
SIRAC AIR CONDITIONING EQUIPMENTS CO., LTD  
STIEBEL ELTRON GmbH & CO. KG  
SWEGON AB  
TOSHIBA CARRIER CORPORATION

VAILLANT GROUP  
VIESSMANN WERKE GmbH & CO. KG  
WATERFURNACE INTERNATIONAL, INC.  
WATERKOTTE GmbH

#### **4. KEY BUSINESS TRENDS**

Menerga AG and its Product Distributors in Germany Acquired by Systemair  
Opening of ATW Heat Pump North Production Base by Yangzi  
PZP HEATING Acquired by Kermi  
Carrier and Bosch Form Heat Pumps Development Pact  
STIEBEL ELTRON Takeovers the Assets of OCHSNER Wärmepumpen  
US Department of Energy Grants \$750,000 for ThermoLift's Natural Gas driven Air Conditioner and Heat Pump Technology  
Ebac Adds Renewable Source Heat Pumps to its Product Line by Investing \$500,000  
Novel Heat Pump Concept from ECN Reduces the Energy Consumed for Paper production  
Systemair Plans the Acquisition of Reftec  
Production Capacity of Johnson Controls' Guangzhou Facility Enhanced by 30%  
Walter Meier (Klima Deutschland) GmbH Acquired by Swegon AB  
Mitsubishi Electric Establishes Cooling & Heating Division Headquarters in Georgia  
Daikin Takeovers the Complete Assets of Goodman  
Modine Takeovers Assets of Geofinity  
WaterFurnace Shenglong HVACR Climate Solutions Co., Ltd. Formed in China  
WaterFurnace Owned 5% of GI Endurant  
Climaveneta and Conserve-It Partner to Develop Chiller and Heat Pumps Control Systems

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Introduction of Daikin's VRV IV Heat Pump System with Optimum LCC  
Novel SWS Series Geothermal Heat Pump Introduced by Sakura  
Panasonic Showcased its ECOi EX Series VRF/Heat Pump at the 2014 AHR Expo  
Development of Oil-Free Heat Pump Using No High GWP Refrigerants  
Unveiling of Mayekawa's High Temperature Hydrocarbon Steam Heat Pump  
Unveiling of Novel Air-Cooled Heat Pump Screw Chiller by Johnson Controls  
Launch of Nortiz's First R290 Hybrid Water Heating System  
SCREWLine WDH-SL3 EXCELLENCE Water Cooled Chillers and Heat Pumps Introduced by Clivet

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Kensa Designed and Developed Novel Hybrid Ground Source Heat Pump  
Johnson Controls Unveils YORK® YSPA Air-to-Water Reversible Screw Heat Pump to China  
Commercial Launch of Johnson Controls' YORK® YSPA Air-to-Water Reversible Screw Heat Pump in China  
Launch of IVT 840/860 Exhaust Air Heat Pumps  
IVT Unveils PremiumLine HQ Ground Source Heat Pump  
Climaveneta Launches Novel Inverter Heat Pump Range  
Launch of CO2 ATW Heat Pump Water Heater by Haier  
Release of Novel Range of ICS AW-HT Heat Pumps  
Novel AirGenerate AirTap Hybrid Heat Pump Water Heaters from GP Conservation  
York® Affinity Series and LX Series Ductless Mini-split Air Conditioners and Heat Pumps from Johnson Controls  
Segen Establishes Strategic Alliance with Panasonic Heat Pumps  
Vitocal 300-G Range of Heat Pumps Introduced by Viessmann  
Release of Two Novel Dave Lennox Signature® Collection Residential Products  
ECA Approval for Hitachi's Hi Efficiency Set Free FSXNH VRF System  
Landmark® Highly Efficient Rooftop Units by Lennox  
Commercial Launch of Europe's First Air-to-Air Heat Pump System Using R32 Refrigerant  
Development of Novel Line of ClimExel Power Inverter Heat Pumps  
Mayekawa's Lake Water-Sourced High Performance Ammonia Heat Pump  
ECO 6 LA / R290 Air-Water Heat Pump from Bartl  
Launch of Novel IVT Air Split Air/Water Heat Pump  
Bosch Launches New Greensource CDi Series Domestic Geothermal Heat Pumps  
AquaForce Range of Chillers and Heat Pumps with Inverter-Driven Screw Compressors  
Viessmann and NextEnergy Partner to Supply KWT Heat Pumps  
Aermec Launches VCF\_X4 Valve Kit  
Commercial Release of Kensa Shoebox Heat Pump  
Daikin Commercializes Air Conditioners with HFC32 Refrigerant  
Launch of Novel 7 Series Variable Capacity Geothermal System by WaterFurnace  
Production of Novel Range of Set Free Systems at Hitachi's Spanish Unit  
Release of Aermec's NRP Multipurpose Heat Pumps with R410A Scroll Compressors  
Envision2 Compact Geothermal Heat Pump Launched  
Hitachi Fulfills European Market Demands by Developing New, Advanced Calorimeter  
AHRI Certification for Climatedmaster's Novel Trilogy 40 GHP  
ROTEX HPSU Compact 308 Split Heat Pump Launched

Novel GSM-based IVT Total Control for Air/Air Heat Pumps

Three-phase Nitrogen-charged Split System Air Conditioners and Heat Pumps from Lennox

EHPA Certifies WPL 5N plus heat pumps from STIEBEL ELTRON

LG Plans to Demonstrate Complete Highly Energy Efficient Air Conditioning and Energy Solutions at MCE 2012

5 SERIES 502W12 HIGH TEMPERATURE HYDRONIC HEAT PUMP UNVEILED BY WATERFURNACE

Hitachi Plans to Establish Hitachi Air Conditioning Europe SAS

Aermec's Air-Water Heat Pumps Receives EHPA Certification from BWP

Aermec Introduces Novel Product Ranges at Interclima 2012

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Aaon, Inc. (United States)

Airwell-Fedders North America, Inc. (United States)

Aitons Equipment Ulc (Canada)

American Geothermal, Inc. (United States)

Bard Manufacturing Company, Inc. (United States)

Boreal Geothermal Inc. (Canada)

Bosch Thermotechnology Corp. (United States)

Carrier Corporation (United States)

Daikin Mcquay (United States)

ECR International, Inc. (United States)

Enertech Global, LLC (United States)

FHP Manufacturing (Florida Heat Pumps) (United States)

Fujitsu General America, Inc. (United States)

General Electric Company (GE Appliances) (United States)

Geoflex Systems Inc. (Canada)

Geomaster, LLC (United States)

Goodman Global, Inc. (United States)

Haier America (United States)

Heat Controller, Inc. (United States)

Johnson Controls, Inc. (United States)

Lennox International Inc. (United States)

LSB Industries, Inc. (United States)

Mammoth, Inc. (United States)

Maritime Geothermal Ltd. (Canada)

Modine Manufacturing Company (United States)

Nordyne Inc (United States)

Northern Heat Pump, Ltd. (Canada)

Rheem Manufacturing Company (United States)

Waterfurnace International, Inc. (United States)

Zehnder Rittling (United States)

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  - Airedale International Air Conditioning Limited (United Kingdom)
  - Airmat (France)
  - Airwell Group (France)
  - Aldes Group (France)
  - Aliseo Group (Italy)
  - Alpha-Innotec GmbH (Germany)
  - Argoclima S.P.A (Italy)
  - Atag Verwarming Nederland B.V. (Netherlands)
  - Atlantic (France)
  - August Brotje GmbH (Germany)
  - Bartl Warmepumpen Vertriebs GmbH (Germany)
  - Baxi Group (United Kingdom)
  - BDR Thermea (Netherlands)
  - Berlinerluft Technik GmbH (Germany)
  - BES Building Energy Solutions GmbH (Immosolar GmbH) (Germany)
  - Blue Box Group S.R.L. (Italy)
  - Bosch Thermo Technik - Robert Bosch A/S (Denmark)
  - Bosch Thermotechnik GmbH (Germany)
  - Bosch Thermoteknik AB - Robert Bosch AB (Sweden)
  - Calorex Heat Pumps Ltd (United Kingdom)

CIAT (Cie Industrielle Applications Thermiqu) Group (France)  
Clivet S.p.A. (Italy)  
CTA AG (Switzerland)  
CTC Enertech AB (Sweden)  
CTC Ferrofil AS (Norway)  
CTC Giersch AG (Switzerland)  
Daikin Europe N.V. (Belgium)  
Danfoss A/S (Denmark)  
Dansk Varmepumpe Industri A/S (Denmark)  
De Dietrich Remeha GmbH (Germany)  
De Dietrich Thermique (France)  
Delclima S.P.A (Italy)  
Dimplex UK Ltd (United Kingdom)  
Dolder Warmetechnik AG (Heat Dolder AG) (Switzerland)  
Earth Energy Limited (United Kingdom)  
Elco GmbH (Elco Heating Solutions) (Germany)  
Enertech Group Ltd. (United Kingdom)  
Ferroli S.P.A. (Italy)  
Friap Feuron AG (Switzerland)  
Fujitsu General Euro GmbH (Germany)  
Galletti S.P.A. (Italy)  
Gebwell Ltd. (Gebwell Oy) (Finland)  
Genvex A/S (Denmark)  
Giersch Brenner Und Heizsysteme (Enertech GmbH) (Germany)  
Glen Dimplex Deutschland GmbH (Germany)  
Glen Dimplex Group (Ireland)  
Glow-Worm (United Kingdom)  
Green Terra AG (Switzerland)  
Heliotherm W?rmepumpentechnik GmbH (Austria)  
Hidros S.P.A. (Italy)  
Hitachi Air Conditioning Europe SAS (France)  
Hitsa-Topair (Spain)  
Hoval AG (Liechtenstein)  
Ideal Heating (United Kingdom)  
IDM-Energiesysteme GmbH (Austria)  
Ingersoll-Rand Plc (Trane) (Ireland)  
IVT Lampopumput (Finland)  
IVT Naturvarme (Denmark)  
IVT Varmepumpar (Sweden)

Kaukora Oy (Finland)  
Kensa Engineering Ltd. (United Kingdom)  
Kingspan Renewables Ltd (United Kingdom)  
KWT Kalte-Warmetechnik AG (Switzerland)  
Lennox Hvac Emeia (France)  
M.T.A. S.P.A. (Italy)  
Master Therm CZ (Czech Republic)  
Max Weishaupt GmbH (Germany)  
Mcquay Italia S.P.A. (Italy)  
Mecaterm (Sweden)  
Metro Therm A/S (Denmark)  
MHG Heiztechnik GmbH (Germany)  
Nibe Industrier AB (Sweden)  
Novelan GmbH (Germany)  
Ochsner Wärmepumpen GmbH (Austria)  
Oilon Oy (Finland)  
Olimpia Splendid S.P.A. (Italy)  
Palm Group (Spain)  
Quantum Energi AB (Sweden)  
Rhoss S.P.A. (Italy)  
Riello S.P.A. (Italy)  
Robur S.P.A. (Italy)  
Rotex Heating Systems GmbH (Germany)  
Roth Werke GmbH (Germany)  
Saunier Duval (France)  
Smartheat Deutschland GmbH (Germany)  
Stiebel Eltron GmbH & Co. KG (Germany)  
Suomen Lampopumpputekniikka Oy (Finland)  
Swegon AB (Sweden)  
Systemair AB (Sweden)  
Technibel (France)  
TEV Limited (United Kingdom)  
Thermia Heat Pumps (Danfoss Värmepumpar AB) (Sweden)  
Tonon Forty S.P.A (Italy)  
Vaillant Group (Germany)  
Viessmann Werke GmbH & Co. KG (Germany)  
Vokera Ltd (United Kingdom)  
Waterkotte GmbH (Germany)  
Wolf GmbH (Germany)

Worcester, Bosch Group (United Kingdom)

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Aisin Seiki Co., Ltd. (Japan)

China Palm A/C & Equipment Co. Ltd. (China)

Chofu Seisakusho Co., Ltd. (Japan)

Daikin Industries Ltd. (Japan)

Denso Corporation

Dunham-Bush Holding Bhd (Malyasia)

Fujitsu General Limited (Japan)

Gree Electric Appliances Inc.

Guangdong Tongyi Electric Appliance Co., Ltd. (China)

Haier Group

Hitachi Appliances, Inc. (Japan)

LG Electronics, Inc. (South Korea)

Mayekawa Manufacturing Co., Ltd. (Japan)

Midea Group (China)

Mitsubishi Electric Corporation (Japan)

Nippon PMAC Co., Ltd. (Japan)

Panasonic Corporation (Japan)

Samsung Electronics Co. Ltd. (South Korea)

Sanden Corporation (Japan)

Shandong Fuerda Air-Conditioning Equipment Co., Ltd (China)

Sirac Air Conditioning Equipments Co., Ltd (China)

Thermax Limited (India)

Toshiba Carrier Corporation (Japan)

Tsinghua Tongfang Artificial Environment Co., Ltd (China)

Zhongshan Amitime Electric Co., Ltd (China)

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## About

The global volume market for Heat Pumps is estimated at xx.x million units in 2013 and forecast to be xx.x million units in 2014. Maintaining a CAGR of xx.x% between 2014 and 2020, the heat Pumps volume market worldwide is further projected to reach xxx.x million units by 2020. In terms of value, global demand for Heat Pumps is anticipated to register a marginally faster CAGR of xx.x% over 2014-2020 and reach a projected US\$xxx.x billion by 2020 from an estimated US\$xx.x billion in 2013 and a forecast US\$xx.x billion in 2014.

In contrast to what has been projected for the future as regards growth rates, the years between 2010 and 2013 witnessed a faster growth in volume sales of heat Pumps on a global basis, which compounded at an annual rate of x.x%, while value sales were slower at x.x%.

### Historical Trend

Over the 2007-2010 analysis period, volume sales of Ground Source HPs worldwide exhibited a CAGR of x.x% and reached xxx.x thousand units in 2010 from xx.x thousand units in 2007. While Asia-Pacific represented the fastest growing market for Ground Source HPs and posted a compounded annual rate of xx.x% during this period, European sales recorded the slowest growth at just x%. North America also recorded a healthy CAGR of xx.x% for volume sales of Ground Source HPs between 2007 and 2010.

Volume sales of Heat Pumps in South Korea stood at xx.x thousand units in 2007 and reached xxx.x thousand units in 2010 by maintaining a robust CAGR of xx.x% between the two years. Air-Water HPs constituted the fastest growing Heat Pump category in the region, with a volume compounded annual rate of xx.x%, while Air-Air HPs posted the slowest growth at xx.x% over 2007-2010.

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