

Ventilation Equipment – A European Market Overview

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Abstracts

European Ventilation Equipment Market Trends and Outlook

The European ventilation equipment market experienced a significant decline in 2020 due to the COVID-19 pandemic, which disrupted new construction and renovation activities across the European Union. However, demand rebounded sharply in 2021-2022, fueled by a recovery in commercial and residential construction, government-backed renovation initiatives, and increased awareness of the importance of Indoor Air Quality (IAQ) in the wake of the pandemic. This resurgence revitalized a previously stagnant market. In 2023, however, demand declined slightly again as economic uncertainty, rising interest rates, and escalating construction costs slowed construction activity across the region.

European unit shipments of ventilation equipment are forecast to reach 40 million units in 2030 registering a CAGR of 3.5% during 2024-2030 period. Shipment value of European ventilation equipment is projected to grow by a CAGR of 3.4% over the forecast period, reaching close US\$7 billion by 2030. In March 2024, the European Parliament adopted the revised Energy Performance in Buildings Directive (EPBD) through a final vote, marking a historic milestone in EU legislation. For the first time, the directive incorporates provisions and requirements addressing Indoor Environmental Quality (IEQ). This advancement enhances building regulations, ensuring that structures across the EU prioritize occupant health and comfort. By focusing on key aspects such as ventilation rates, humidity control, and contaminant reduction, the updated EPBD establishes a new benchmark for sustainable and healthy building practices. The combination of stricter energy efficiency requirements and expectations for adequate ventilation presents significant growth opportunities for the ventilation market in the coming years.

Major companies operating in the European Ventilation Equipment market include Aldes

Group, Ariston Group, ebm-papst, Elica, Elta Group, Faber, FLAKT Group, France Air Group, Groupe Atlantic, Helios, Hidria Rotomatika, Howden, ITHO, LINDAB, MAICO, Munters, Rosenberg Ventilatoren, Soler & Palau, Swegon, Systemair, Volution Group, and Zehnder Group among others.

European Ventilation Equipment Regional Market Analysis

Countries covered in the European Ventilation Equipment market include Czech Republic, Denmark, France, Germany, Italy, the Netherlands, Poland, Portugal, Spain, Sweden, and the United Kingdom. With a share of 48% in 2024, Germany is the producer of ventilation equipment in Europe in terms of volume shipments and slated to record a CAGR of 3.6% between 2024 and 2030. Italy, United Kingdom, and Poland are the other leading countries for the production of ventilation equipment in Europe. Volume shipments of ventilation equipment in Poland is projected to post the fastest 2024-2030 CAGR of 4.4%, producing 2.6 million units in 2030.

European Ventilation Equipment Market Analysis by Product Segment

The market for European Ventilation Equipment by product segment analyzed in this report include Axial Fans, Centrifugal Fans, Roof/Attic Fans, Cross-flow Fans, Range Hoods, Domestic Exhaust Fans, and Air Handling Units. Axial Fans is the largest segment in terms of value shipments in the European ventilation equipment market with a share of 30.6% in 2023 and anticipated to post a CAGR of 3.8% between 2024 and 2030 in reaching 12.5 million units in 2030. In terms of value, Centrifugal Fans corners the largest share of European Ventilation Equipment market, estimated at 28.3% in 2024, followed closely by Axial Fans and Range Hoods. Air Handling Units used in ventilation are expected to post the fastest similar period CAGR of 4.2% and reach US\$710 million by 2030.

European Ventilation Equipment Market Report Scope

This European Ventilation Equipment report analyzes the market size is based on unit shipments by ventilation equipment manufacturers. This market report analyzes ventilation equipment volume shipments and value by product segment and country for the period 2021-2030 with projections from 2024 to 2030. In addition to providing profiles of major companies operating in the European ventilation industry, the latest corporate and industrial developments have been covered to offer a clear panorama of European ventilation 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: 70+

European Ventilation Equipment Market by Country

Czech Republic

Denmark

France

Germany

Italy

The Netherlands

Poland Portugal

Spain

Sweden

The United Kingdom

Rest of Europe

European Ventilation Equipment Market by Product Segment

Axial Fans

Centrifugal Fans

Roof/Attic Fans

Cross-flow Fans

Range Hoods

Domestic Exhaust Fans

Air Handling Units

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Ecodesign - Fans

Eurovent Certification for Air Conditioning and Ventilation Products

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European Economic and Construction Trends

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Aldes Group (France)
Ariston Group (Netherlands)
ebm-papst Mulfingen GmbH & Co. KG (Germany)
Elica S.p.A. (Italy)
Elta Group (United Kingdom)
Faber S.p.A (Italy)
FLAKT Group (Germany)
France Air Group (France)
Groupe Atlantic (France)
Helios Ventilatoren GmbH + Co., Kg. (Germany)
Hidria Rotomatika d.o.o. (Slovenia)
Howden, Chart Industries (United Kingdom)
ITHO Daalderop (The Netherlands)
LINDAB International AB (Sweden)
MAICO Elektroapparate-Fabrik GmbH (Germany)
Munters AB (Sweden)
Nicotra Gebhardt S.p.A. (Italy)
Nuaire Group (United Kingdom)
Ostberg Group AB (Sweden)
Rosenberg Ventilatoren GmbH (Germany)
Soler & Palau Sistemas De Ventilacion, S.L.U. (Spain)
Swegon AB (Sweden)
Systemair AB (Sweden)
TROX GmbH (Germany)
Volution Group plc (United Kingdom)
Zehnder Group AG (Switzerland)
Ziehl-Abegg SE (Germany)

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FRANCE

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