

# **Pool Heat Pump Market Report by Type (Air Source, Water/Geothermal Source), Capacity (Less than 10kW, 10kW-20kW, Greater than 20kW), End User (Residential, Commercial), and Region 2024-2032**

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## **Abstracts**

The global pool heat pump market size reached US\$ 4.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 6.9 Billion by 2032, exhibiting a growth rate (CAGR) of 3.87% during 2024-2032. The market is growing rapidly driven by rising demand for energy-efficient solutions, increasing number of residential and commercial pools, rapid technological advancements, ongoing climate change and extended swimming seasons, and heightened awareness of eco-friendly products

**Pool Heat Pump Market Analysis:**

**Market Growth and Size:** The market is witnessing stable growth, driven by the rising number of residential and commercial pools and increasing demand for energy-efficient heating solutions across the globe.

**Major Market Drivers:** Key drivers influencing the market growth include the growing demand for energy-efficient and eco-friendly heating solutions, an increase in residential and commercial pools, and rising disposable incomes. Furthermore, rapid technological innovations and extended swimming seasons due to climate change, is supporting the market growth.

**Technological Advancements:** Recent innovations, such as variable speed compressors, improved heat exchangers, and integration with smart home systems, that are enhancing the efficiency and functionality of pool heat pumps, are driving the market growth.

**Industry Applications:** The market is experiencing high product demand in both residential settings for private pools and in commercial sectors, such as hotels, resorts, and public swimming facilities.

**Key Market Trends:** The key market trends involve the ongoing shift towards more energy-efficient models, smart technology integration, and the use of eco-friendly refrigerants. Additionally, the widespread adoption of high-capacity units for commercial applications and the growing popularity of air source heat pumps, is boosting the market growth.

**Geographical Trends:** North America leads the market due to its strong culture of residential swimming pools and growing demand for efficient pool heating solutions. Other regions are also showing significant growth, fueled by rapid economic growth and increasing pool installation.

**Competitive Landscape:** The market is competitive, with key players engaging in innovation, geographical expansion, strategic partnerships, and mergers and acquisitions. Additionally, they are focusing on sustainability and enhancing customer service to gain a competitive edge.

**Challenges and Opportunities:** The market faces various challenges, such as high initial investment costs and varying climate condition affecting efficiency. However, technological advancements, expansion into emerging markets, and increasing global focus on sustainability are creating new opportunities for the market growth.

#### Pool Heat Pump Market Trends:

##### Rising demand for energy-efficient solutions

Pool heat pumps offer a more sustainable and cost-effective way to maintain ideal water temperatures compared to traditional heating methods, such as gas or electric heaters. They operate by extracting heat from the surrounding air or water, significantly reducing energy consumption. It is particularly appealing in the context of rising energy costs and growing environmental concerns. Furthermore, pool heat pumps lead to long-term cost savings for consumers, offsetting the initial installation expenses. Additionally, the heightened awareness and regulations around energy efficiency and carbon footprint reduction, prompting consumers and businesses to opt for eco-friendly solutions like pool heat pumps, is favoring the market growth.

##### Increasing number of residential and commercial pools

The growth in the number of residential and commercial swimming pools is a significant factor propelling the market growth. Along with this, the rising global middle-class population, particularly in emerging economies, where owning a home with a pool is becoming a symbol of improved socioeconomic status, is favoring the market growth. Furthermore, the incorporation of swimming pools in various commercial sectors, such as hotels, resorts, and sports clubs, as essential amenities is driving the market growth.

This surge in the number of pools is facilitating the demand for efficient and reliable heating solutions, making pool heat pumps an essential component of pool maintenance. Moreover, the growing interest in health and wellness, with swimming recognized as a beneficial physical activity, is acting as another growth-inducing factor.

#### Rapid technological advancements

Recent innovations in heat pump technology, such as variable speed compressors and advanced heat exchangers, which have significantly improved the performance and energy efficiency of pool heat pumps, are boosting the market growth. These advancements allow for faster heating times, better temperature regulation, and lower operating costs. Additionally, modern pool heat pumps are increasingly incorporating smart technology, enabling remote monitoring and control via smartphones or tablets. It enhances user convenience and allows for more precise control of pool temperatures, further reducing energy consumption. Furthermore, the introduction of heat pumps with lower Global Warming Potential (GWP) refrigerants, in line with global environmental regulations and sustainability goals, is driving the market growth.

#### Ongoing climate change and extended swimming seasons

Climate change and the resulting extended swimming seasons are significantly impacting the market growth. Global warming has led to milder winters and longer summers in many regions, extending the traditional swimming season. It has encouraged pool owners to invest in heating solutions to make their pools usable for a more extended period each year. Pool heat pumps, with their ability to efficiently maintain optimal water temperatures, have become an attractive option for extending the swimming season. Additionally, climate change has also led to more unpredictable weather patterns, with sudden temperature drops even during warmer months. Pool heat pumps can address this variability, providing a consistent and comfortable swimming environment.

#### Heightened awareness of eco-friendly products

The increasing awareness of eco-friendly products is a major factor influencing the market growth. Consumers are becoming more conscious of their environmental impact and are actively seeking out sustainable and eco-friendly options in various aspects of their lives, including home appliances and amenities. Pool heat pumps align well with this trend as they are more energy-efficient and have a lower carbon footprint than traditional pool heating methods. Furthermore, the heightened awareness of global

environmental issues, such as climate change and resource depletion among the masses, is acting as another growth-inducing factor. Moreover, governments and environmental organizations are actively promoting the use of energy-efficient appliances through awareness campaigns, subsidies, and rebates, further encouraging consumers to opt for eco-friendly options.

#### Pool Heat Pump Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on type, capacity, and end user.

#### Breakup by Type:

Air Source

Water/Geothermal Source

Air source accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes air source and water/geothermal source. According to the report, air source represented the largest segment.

Air source pool heat pumps represent the largest market segment due to their widespread availability, cost-effectiveness, and ease of installation. These heat pumps function by extracting heat from the ambient air, a process that is efficient in a wide range of climates. They are particularly popular in regions with moderate climates where the temperature differential between the air and the pool water is not extreme. Furthermore, air source heat pumps are favored by both residential and commercial pool owners for their lower initial investment compared to other types.

Water or geothermal source pool heat pumps harness heat from water sources or from the ground, making them an excellent choice for areas where these resources are readily available. Geothermal heat pumps are particularly efficient as they utilize the relatively constant temperature of the ground or groundwater, providing consistent heating performance regardless of air temperature.

#### Breakup by Capacity:

Less than 10kW

10kW-20kW

Greater than 20kW

Greater than 20kW holds the largest share in the industry

A detailed breakup and analysis of the market based on capacity have also been provided in the report. This includes less than 10kW, 10kW-20kW, and greater than 20kW. According to the report, greater than 20kW accounted for the largest market share.

The greater than 20kW capacity segment holds the largest market share, catering to commercial applications and large residential pools. These high-capacity units are essential in settings where a significant amount of water needs to be heated, such as in public swimming pools, resorts, and large community centers. Furthermore, the greater than 20kW segment is characterized by high-performance units that are capable of maintaining consistent temperatures in large volumes of water, even in colder climates or during extended usage periods. These units are typically more advanced, featuring state-of-the-art technology for maximum efficiency and durability.

Pool heat pumps with a capacity of less than 10kW cater primarily to the residential market, particularly for small to medium-sized pools. This segment is characterized by its suitability for households looking for an efficient, cost-effective solution to extend their swimming season without the need for extensive heating power. Furthermore, pumps with this capacity are ideal for regions with milder climates and for pool owners who require minimal heating.

The 10kW-20kW capacity segment serves a broad range of applications, striking a balance between power and efficiency. This segment is versatile, catering to both larger residential pools and smaller commercial pools, such as those in boutique hotels or fitness centers. Furthermore, these pool heat pumps are appealing to pool owners who seek a cost-effective yet powerful heating solution.

Breakup by End User:

Residential

Commercial

Hotels and Resorts

Spas

Educational Institutions

Water Parks  
Sports Club  
Others

Residential represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end user. This includes residential and commercial (hotels and resorts, spas, educational institutions, water parks, sports club, and others). According to the report, residential represented the largest segment.

The residential segment represents the largest market share due to the increasing number of private homes with swimming pools. Pool heat pumps serve as an efficient solution for extending the swimming season and enhancing the comfort and value of a home. Furthermore, the escalating preference for pool heat pumps in the residential sector, owing to their energy efficiency, cost-effectiveness, and ability to provide a comfortable, consistent water temperature, is contributing to the market growth. Additionally, the availability of a wide range of products tailored to various pool sizes and climate conditions, allowing homeowners to choose a system that best fits their specific needs, is bolstering the market growth.

The commercial segment encompasses various facilities, such as hotels, resorts, public swimming pools, spas, health clubs, and educational institutions. In these settings, pool heat pumps are essential for maintaining an optimal and consistent water temperature, ensuring comfort for a large number of users. Furthermore, the commercial sector often requires larger, more powerful heat pumps to accommodate the greater volume of water in public or semi-public pools.

Breakup by Region:

North America  
United States  
Canada  
Asia Pacific  
China  
Japan  
India  
South Korea  
Australia

Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

North America leads the market, accounting for the largest pool heat pump market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America holds the largest market share due to a strong culture of residential swimming pools. Additionally, the region's climate variability, with areas experiencing cooler temperatures, is contributing to the market growth. In addition, the significant presence of commercial pools in hotels, resorts, and public facilities is further driving the market growth. Besides this, the high consumer awareness regarding energy-efficient and eco-friendly products, aligning well with the advantages of pool heat pumps, is catalyzing the market growth. Moreover, the development of advanced technological infrastructure and a competitive market landscape, fostering innovation and a diverse range of products, is favoring the market growth.

The Asia Pacific region is experiencing rapid growth in the pool heat pump market, driven by economic development and increasing disposable incomes. Additionally, the growing middle-class population in this region, which is investing more in home

improvement and luxury amenities, including swimming pools, is acting as another growth-inducing factor.

Europe represents a significant portion of the global pool heat pump market, with demand driven by both residential and commercial sectors. Additionally, the region's focus on energy efficiency and sustainability, backed by stringent regulations and environmental targets, is positively impacting the market growth. Besides this, the cooler climate in many European countries, which necessitates effective pool heating solutions, is driving the market growth.

In Latin America, the pool heat pump market is growing due to the increasing number of private and public pools. Additionally, the region's economic development, leading to greater investments in leisure and hospitality infrastructure, is contributing to the market growth. Besides this, the increasing urbanization and the rising middle class in the region are acting as another growth-inducing factor.

The pool heat pump market in the Middle East and Africa is gradually gaining momentum, driven by the hospitality sector. Furthermore, the rapid expansion of the tourism industry in the region and its penchant for luxury amenities, including temperature-controlled swimming pools, is catalyzing the market growth. Additionally, the ongoing investments in tourism and luxury real estate are favoring the market growth.

**Leading Key Players in the Pool Heat Pump Industry:**

Key players are heavily investing in research and innovation to introduce more efficient, reliable, and technologically advanced pool heat pumps. It includes the development of heat pumps with higher energy efficiency ratings, lower greenhouse gas emissions, and smart features like remote monitoring and control. Additionally, several market leaders are expanding their geographical footprint by entering new markets, particularly in regions experiencing rapid growth. Besides this, they are also diversifying their product range to cater to different segments of the market, from residential to commercial applications, and offering products that suit a variety of climatic conditions.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AquaPro Systems

Dantherm AS



G&F Manufacturing Co. Inc.  
Hayward Industries Inc.  
Pahlen AB  
Pentair Plc  
Rheem Manufacturing Company  
Team Horner Group  
Thermeau Industries inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Latest News:

In October 2022, AquaPro Systems was acquired by Intermatic Incorporated to expand its existing line of pool and spa catalog, including filters, pumps, air blowers, heat pumps, and more.

In November 2021, Hayward Industries introduced recent pool innovations called HEATPRO VS, to keep the pool at just the right temperature while saving more energy.

In September 2023, Pahlen AB opened a new showroom in Spain for pool components and renovation.

#### Key Questions Answered in This Report

1. How big is the global pool heat pump market?
2. What is the expected growth rate of the global pool heat pump market during 2024-2032?
3. What are the key factors driving the global pool heat pump market?
4. What has been the impact of COVID-19 on the global pool heat pump market?
5. What is the breakup of the global pool heat pump market based on the type?
6. What is the breakup of the global pool heat pump market based on the capacity?
7. What is the breakup of the global pool heat pump market based on the end user?
8. What are the key regions in the global pool heat pump market?
9. Who are the key players/companies in the global pool heat pump market?

## Contents

### 1 PREFACE

### 2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### 3 EXECUTIVE SUMMARY

### 4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

### 5 GLOBAL POOL HEAT PUMP MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### 6 MARKET BREAKUP BY TYPE

- 6.1 Air Source
  - 6.1.1 Market Trends
  - 6.1.2 Market Forecast
- 6.2 Water/Geothermal Source
  - 6.2.1 Market Trends

## 6.2.2 Market Forecast

## **7 MARKET BREAKUP BY CAPACITY**

### 7.1 Less than 10kW

#### 7.1.1 Market Trends

#### 7.1.2 Market Forecast

### 7.2 10kW-20kW

#### 7.2.1 Market Trends

#### 7.2.2 Market Forecast

### 7.3 Greater than 20kW

#### 7.3.1 Market Trends

#### 7.3.2 Market Forecast

## **8 MARKET BREAKUP BY END USER**

### 8.1 Residential

#### 8.1.1 Market Trends

#### 8.1.2 Market Forecast

### 8.2 Commercial

#### 8.2.1 Market Trends

#### 8.2.2 Key Segments

##### 8.2.2.1 Hotels and Resorts

##### 8.2.2.2 Spas

##### 8.2.2.3 Educational Institutions

##### 8.2.2.4 Water Parks

##### 8.2.2.5 Sports Club

##### 8.2.2.6 Others

#### 8.2.3 Market Forecast

## **9 MARKET BREAKUP BY REGION**

### 9.1 North America

#### 9.1.1 United States

##### 9.1.1.1 Market Trends

##### 9.1.1.2 Market Forecast

#### 9.1.2 Canada

##### 9.1.2.1 Market Trends

##### 9.1.2.2 Market Forecast

## 9.2 Asia-Pacific

### 9.2.1 China

9.2.1.1 Market Trends

9.2.1.2 Market Forecast

### 9.2.2 Japan

9.2.2.1 Market Trends

9.2.2.2 Market Forecast

### 9.2.3 India

9.2.3.1 Market Trends

9.2.3.2 Market Forecast

### 9.2.4 South Korea

9.2.4.1 Market Trends

9.2.4.2 Market Forecast

### 9.2.5 Australia

9.2.5.1 Market Trends

9.2.5.2 Market Forecast

### 9.2.6 Indonesia

9.2.6.1 Market Trends

9.2.6.2 Market Forecast

### 9.2.7 Others

9.2.7.1 Market Trends

9.2.7.2 Market Forecast

## 9.3 Europe

### 9.3.1 Germany

9.3.1.1 Market Trends

9.3.1.2 Market Forecast

### 9.3.2 France

9.3.2.1 Market Trends

9.3.2.2 Market Forecast

### 9.3.3 United Kingdom

9.3.3.1 Market Trends

9.3.3.2 Market Forecast

### 9.3.4 Italy

9.3.4.1 Market Trends

9.3.4.2 Market Forecast

### 9.3.5 Spain

9.3.5.1 Market Trends

9.3.5.2 Market Forecast

### 9.3.6 Russia

9.3.6.1 Market Trends

9.3.6.2 Market Forecast

9.3.7 Others

9.3.7.1 Market Trends

9.3.7.2 Market Forecast

9.4 Latin America

9.4.1 Brazil

9.4.1.1 Market Trends

9.4.1.2 Market Forecast

9.4.2 Mexico

9.4.2.1 Market Trends

9.4.2.2 Market Forecast

9.4.3 Others

9.4.3.1 Market Trends

9.4.3.2 Market Forecast

9.5 Middle East and Africa

9.5.1 Market Trends

9.5.2 Market Breakup by Country

9.5.3 Market Forecast

## **10 DRIVERS, RESTRAINTS, AND OPPORTUNITIES**

10.1 Overview

10.2 Drivers

10.3 Restraints

10.4 Opportunities

## **11 VALUE CHAIN ANALYSIS**

## **12 PORTERS FIVE FORCES ANALYSIS**

12.1 Overview

12.2 Bargaining Power of Buyers

12.3 Bargaining Power of Suppliers

12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

## 13 PRICE ANALYSIS

## 14 COMPETITIVE LANDSCAPE

### 14.1 Market Structure

### 14.2 Key Players

### 14.3 Profiles of Key Players

#### 14.3.1 AquaPro Systems

##### 14.3.1.1 Company Overview

##### 14.3.1.2 Product Portfolio

#### 14.3.2 Dantherm AS

##### 14.3.2.1 Company Overview

##### 14.3.2.2 Product Portfolio

#### 14.3.3 G&F Manufacturing Co. Inc.

##### 14.3.3.1 Company Overview

##### 14.3.3.2 Product Portfolio

#### 14.3.4 Hayward Industries Inc.

##### 14.3.4.1 Company Overview

##### 14.3.4.2 Product Portfolio

#### 14.3.5 Pahlen AB

##### 14.3.5.1 Company Overview

##### 14.3.5.2 Product Portfolio

#### 14.3.6 Pentair Plc

##### 14.3.6.1 Company Overview

##### 14.3.6.2 Product Portfolio

#### 14.3.7 Rheem Manufacturing Company

##### 14.3.7.1 Company Overview

##### 14.3.7.2 Product Portfolio

#### 14.3.8 Team Horner Group

##### 14.3.8.1 Company Overview

##### 14.3.8.2 Product Portfolio

#### 14.3.9 Thermeau Industries inc.

##### 14.3.9.1 Company Overview

##### 14.3.9.2 Product Portfolio

## List Of Tables

### LIST OF TABLES

Table 1: Global: Pool Heat Pump Market: Key Industry Highlights, 2023 & 2032

Table 2: Global: Pool Heat Pump Market Forecast: Breakup by Type (in Million US\$), 2024-2032

Table 3: Global: Pool Heat Pump Market Forecast: Breakup by Capacity (in Million US\$), 2024-2032

Table 4: Global: Pool Heat Pump Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 5: Global: Pool Heat Pump Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Pool Heat Pump Market: Competitive Structure

Table 7: Global: Pool Heat Pump Market: Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1: Global: Pool Heat Pump Market: Major Drivers and Challenges

Figure 2: Global: Pool Heat Pump Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Pool Heat Pump Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Pool Heat Pump Market: Breakup by Type (in %), 2023

Figure 5: Global: Pool Heat Pump Market: Breakup by Capacity (in %), 2023

Figure 6: Global: Pool Heat Pump Market: Breakup by End User (in %), 2023

Figure 7: Global: Pool Heat Pump Market: Breakup by Region (in %), 2023

Figure 8: Global: Pool Heat Pump (Air Source) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Pool Heat Pump (Air Source) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Pool Heat Pump (Water/Geothermal Source) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Pool Heat Pump (Water/Geothermal Source) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Pool Heat Pump (Less than 10kW) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Pool Heat Pump (Less than 10kW) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Pool Heat Pump (10kW-20kW) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Pool Heat Pump (10kW-20kW) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Pool Heat Pump (Greater than 20kW) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Pool Heat Pump (Greater than 20kW) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Pool Heat Pump (Residential) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Pool Heat Pump (Residential) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Pool Heat Pump (Commercial) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Pool Heat Pump (Commercial) Market Forecast: Sales Value (in



Million US\$), 2024-2032

Figure 22: North America: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: North America: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: United States: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: United States: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Canada: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Canada: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Asia-Pacific: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Asia-Pacific: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: China: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: China: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Japan: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Japan: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: India: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: India: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: South Korea: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: South Korea: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Australia: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Australia: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: Indonesia: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: Indonesia: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Others: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Others: Pool Heat Pump Market Forecast: Sales Value (in Million US\$),

2024-2032

Figure 44: Europe: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Europe: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Germany: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Germany: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: France: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: France: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: United Kingdom: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: United Kingdom: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Italy: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Italy: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Spain: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Spain: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Russia: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Russia: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Others: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Others: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Latin America: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Latin America: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Brazil: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Brazil: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Mexico: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Mexico: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Others: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Others: Pool Heat Pump Market Forecast: Sales Value (in Million US\$),

2024-2032

Figure 68: Middle East and Africa: Pool Heat Pump Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Middle East and Africa: Pool Heat Pump Market: Breakup by Country (in %), 2023

Figure 70: Middle East and Africa: Pool Heat Pump Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 71: Global: Pool Heat Pump Industry: Drivers, Restraints, and Opportunities

Figure 72: Global: Pool Heat Pump Industry: Value Chain Analysis

Figure 73: Global: Pool Heat Pump Industry: Porter's Five Forces Analysis

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