

# Heat Pump Market based on , by Type (Air Source, Water Source, Geothermal (Ground) Source), End-User Vertical (Industrial, Commercial, Institutional, Residential), Regional Outlook– Global Forecast up to 2032

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## Abstracts

Estimating the present size of the heat pump market was one of the study's main tasks. To gather data on the parent and peer markets, a thorough investigation was conducted through secondary research. The following stage involved conducting primary research to confirm these conclusions, hypotheses, and sizing with industry experts throughout the value chain. Two methodologies were utilized to approximate the overall market size: top-down and bottom-up. The market size of the segments and subsegments was then estimated using data triangulation and market breakdown.

A number of parties are involved in the heat pump market, including supply chain technical support providers, technology providers, and manufacturers of heat pumps. The growing need for heating and cooling solutions across a range of applications, including energy, mobility, industrial, and grid injection, is what defines the demand side of this market. Growing demand from the industrial sector for contracts and large-scale player mergers and acquisitions define the supply side. To gather both qualitative and quantitative data, a range of primary sources from the supply and demand sides of the market were questioned.

To gather and identify data for a technical, market-oriented, and commercial study of the heat pump market, this market research study used a wide range of secondary sources, directories, and databases, including Hoover's, Bloomberg, Factiva, IRENA, International Energy Agency, and Statista Industry Journal. The other secondary sources included manufacturer organizations, trade directories, databases, white

papers, certified publications, investor presentations and annual reports, as well as pieces written by renowned writers and manufacturer associations.

The segmentation coverage of the study is provided below.

Heat Pump Market based on Type:

Air-Source

Water-Source

Heat Pump Market based on End user:

Industrial

Commercial

Institutional

Residential

Heat Pump Market based on Geography:

North America

US

Canada

Europe

Germany

UK

France

Italy

Spain

Rest of Europe (RoE)

Asia Pacific (APAC)

China

Japan

India

Australia

South Korea

Rest of Asia Pacific (RoAPAC)

Latin America (LATAM)

Brazil

Argentina

Rest of South America

Middle East and Africa (MEA)

UAE

Turkey

Saudi Arabia

South Africa

Rest of Middle East & Africa

According to the International Energy Agency, fossil fuel-based solutions accounted for about half of global heating equipment sales in 2022, with the majority of heat pumps being installed in new buildings. Heat pumps, on the other hand, continue to cover a relatively modest fraction of household heat demand. Nonetheless, a number of variables, such as evolving regulations, stricter building codes that support heat pumps in new construction, and growing demand for air conditioning, are probably going to accelerate the uptake of heat pump technologies in the upcoming years.

The fiercely competitive worldwide heat pump market depends on advancements in technology and improved products. Players in the market want to achieve application development in order to have a competitive edge. Furthermore, because it is possible to acquire a highly skilled labor at a cheap cost and low raw material cost, local manufacturers in Asia Pacific represent a serious threat to the large companies in terms of the quality and price of the products given to clients.

In 2023, the air-source technology category held a dominant market share of nearly 84.6%. Hot water and radiator heat are produced by an air source heat pump that is connected to wet central heating systems. These pumps take up heat and transmit it to other media, much like a refrigerator. Air-to-air heat pumps are used in most air-source heat pump integrations to either warm or cool air. Throughout the projected years, there will likely be a rise in demand for air source technology due to its capacity to deliver space heating and cooling solutions as well as water-heating solutions. LG unveiled an air source heat pump (ASHP) in February 2023 that can heat 200–270 liters of water for household use. The pump employs R134a as a fuel source and has a coefficient of performance (COP) of up to 3.85.

Over the course of the forecast period, the water-source technology category is anticipated to grow at a CAGR of 8.7%. Those who reside close to water sources will find it most appropriate. With a COP of about 5, these pumps have extremely high efficiency—that is, they produce five units of heat for every unit of electricity. Because their geothermal subsoil heat source maintains a constant temperature, geothermal heat pumps are more efficient than air source heat pumps. It is among the most economical and environmentally friendly options on the market. Over the course of the projection period, the market is anticipated to develop due to the growing significance of GSHP in the global market due to its high energy efficiency.

In 2023, the heat pump segment with a capacity of up to 10–20 kW held a 21.3%

market share. The expansion is explained by the capacity type's adaptability to a variety of settings, including factories, restaurants, hotels, swimming pools, and schools. Most heat pumps in this size have a large selection of hydraulic choices and communication protocols, operate quietly, are favorable to the environment, and have great efficiency. ThermoWise, a heat pump manufacturer with a 10–20 kW capacity, unveiled the DKRS-200SN4–M2 model. This specific product can sustain a temperature of up to 65 degrees Celsius, making it ideal for use in establishments like hotels, jails, and schools where there is a greater need for hot water.

In 2023, the segment with the type of electric operation accounted for 86.0% of revenue. Electricity is used by an electric heat pump to move heat from a cold area to a heated area. During the summer, these heat pumps are utilized for cooling as well as heating. The market for electric heat pumps is predicted to grow profitably because of their advantages over gas pumps, including improved air quality, energy economy, silent operation, and safety.

Because hybrid heat pumps lower end users' monthly energy bills, they ensure long-term savings. End customers who utilize hybrid heat pumps can also receive a tax credit or refund, which propels the expansion of this market. Furthermore, because hybrid heat pumps can convert between a gas furnace and a heat pump, using one lowers carbon footprint.

This report illustrates the most vital attributes of the Heat Pump Market, which are driving and providing opportunities.

This research gives an in-depth analysis of the Heat Pump Market growth on the basis of several segments in the market.

This report presents the predictions of the past and present trends of the Heat Pump Market.

This study also presents the competitive analysis, such as key strategies and capabilities of major players of the Heat Pump Market.

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