

Global Air Cooled Chiller Market Growth 2026-2032

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Abstracts

The global Air Cooled Chiller market size is predicted to grow from US\$ 2196 million in 2025 to US\$ 2715 million in 2032; it is expected to grow at a CAGR of 3.1% from 2026 to 2032.

An air-cooled chiller is a refrigeration-based cooling unit that removes heat from a circulating process fluid (typically water or a water-glycol mix) and rejects that heat directly to the surrounding air using a condenser coil and fans. Inside the unit, the refrigerant absorbs heat from the process fluid in the evaporator, is compressed, then releases that heat in the air-cooled condenser before repeating the cycle; controls regulate leaving fluid temperature and protect the system with sensors and alarms. Air-cooled chillers are popular because they're self-contained and easier to install than water-cooled systems (no cooling tower), making them common for industrial process cooling and smaller to mid-sized HVAC loads where simplicity and lower infrastructure needs matter. Air-cooled chillers are often budgeted equipment-only at roughly ~\$600/ton (scroll) to ~\$800/ton (screw)—with commonly quoted new-unit ranges of ~\$3k–\$15k for 5–20 tons, ~\$15k–\$80k for 20–100 tons, and ~\$80k–\$250k+ for 100+ tons—while installed/project costs can rise to ~\$1k–\$3k+ per ton depending on scope.

Upstream, an air-cooled chiller is built from the same core refrigeration and heat-transfer supply base—compressor(s), fin-tube air-cooled condenser coil, evaporator heat exchanger, expansion valve, refrigerant and oil, plus fans/motors, pumps and reservoir (if packaged), filters/valves/piping, electrical gear (contactors, breakers, VFDs), sensors, and a controller/PLC—along with sheet-metal cabinet fabrication and testing/certification done by the chiller OEM and key component suppliers. Downstream, air-cooled chillers are sold through direct OEM channels, distributors, and HVAC/process contractors, then installed outdoors or in ventilated mechanical areas to serve process cooling (plastics, metalworking, laser, printing, chemical/pharma, food & beverage) and commercial/industrial HVAC loads, with ongoing aftermarket demand driven by

commissioning, coil cleaning, fan/compressor replacements, refrigerant leak repair/compliance, control upgrades, and service contracts focused on uptime and energy performance.

Air-cooled chillers remain the “default” choice wherever customers want fast deployment, lower site complexity, and minimal water infrastructure, which keeps them strong in general manufacturing and many commercial/industrial projects; at the same time, the segment is being reshaped by two big forces: (1) refrigerant transition and (2) data-center cooling architecture changes. On refrigerants, OEM roadmaps are accelerating because the EU’s revised F-gas regime is tightening quotas and restrictions (in force since March 11, 2024) and the U.S. AIM Act “Technology Transitions” restrictions begin phasing in from January 1, 2025, pushing product redesigns, safety engineering, and service practices as lower-GWP options expand in air-cooled portfolios.

LP Information, Inc. (LPI) ' newest research report, the “Air Cooled Chiller Industry Forecast” looks at past sales and reviews total world Air Cooled Chiller sales in 2025, providing a comprehensive analysis by region and market sector of projected Air Cooled Chiller sales for 2026 through 2032. With Air Cooled Chiller sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air Cooled Chiller industry.

This Insight Report provides a comprehensive analysis of the global Air Cooled Chiller landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air Cooled Chiller portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Air Cooled Chiller market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air Cooled Chiller and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Air Cooled Chiller.

This report presents a comprehensive overview, market shares, and growth opportunities of Air Cooled Chiller market by product type, application, key

manufacturers and key regions and countries.

Segmentation by Type:

Outlet Temperature: -25? ~ -5?

Outlet Temperature: -25? ~ -45?

Outlet Temperature: Lower than -45?

Segmentation by Compressor Technology:

Reciprocating

Centrifugal

Screw

Scroll

Segmentation by System Configuration:

Packaged Air-cooled

Split Air-cooled

Modular Air-cooled

Segmentation by Application:

Chemical

Pharmaceutical

Food and Beverage

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Bosch

Carrier

CustomChill

Daikin

Dimplex Thermal Solutions

DunAn

Dunham-Bush

Ebara

Guangzhou Teyu Electromechanical

Johnson Controls - Hitachi

Legacy Chiller Systems

LG Electronics

Lytron Inc

Maruyama Chillers Corporation

Mirapro

Mitsubshi

Multistack

Parker Hannifin

Rexxam

SCY Chiller

Shinwa Controls

Smardt?Chiller?Group

SMC

Thermonics Chillers

TICA

Trane

WEXTEN

Whaley Products

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air Cooled Chiller market?

What factors are driving Air Cooled Chiller market growth, globally and by region?
Which technologies are poised for the fastest growth by market and region?
How do Air Cooled Chiller market opportunities vary by end market size?
How does Air Cooled Chiller break out by Type, by Application?

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