

District Cooling Market by Production Technique (Free Cooling, Absorption Cooling, Electric chillers), Application (Commercial, Residential, and Industrial) and Region (North America, Europe, APAC, MEA, South America) - Global Forecast to 2026

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Abstracts

The global district cooling market is projected to reach USD 1,177 million by 2026 from an estimated market size of USD 931 million in 2021, at a CAGR of 3.4% during the forecast period. The district cooling market is primarily driven by the Surging need for efficient cooling in regions with hot climates. Rapid urbanization will put tremendous pressure on urban infrastructure. With the increasing number of people moving to cities, the demand for cooling residential and commercial spaces is also expected to increase in the coming years.

“The Commercial meters segment, by Application, is expected to be the fastest-growing market from 2021 to 2026”

The Application segment is categorized as commercial, residential, and industrial. The commercial district cooling market is projected to grow at a CAGR of 3.5% during the forecast period. Middle east and Africa, with a share of 73.7% in 2021, dominated the district cooling commercial market. The demand for district cooling in the commercial segment is driven by concerns regarding the impact on the environment and rising energy prices have made the use of energy-efficient district cooling systems a favorable solution for cooling in commercial spaces.

“The electric chillers segment, by Production technique, is expected to be the largest market from 2021 to 2026”

The electric chillers segment accounted for the largest share of the district cooling market, by application, in 2021. The demand for electric chillers from the production technique sector is driven by the relatively higher coefficient of performance (COP) in comparison with that of residential and commercial air conditioning units. Even Linking electric chillers with cold storage on a network helps reduce peak electricity demand for cooling in a city by shifting production to other periods of the day.

“The Middle East and Africa: The largest growing region in the district cooling market.”

The Middle East and Africa are expected to dominate the district cooling market during the forecast period due to shift in the electricity demand and supply balance in the Middle East & Africa and Asia Pacific regions have resulted in the wider use of district cooling, which has enabled utilities and developers to balance power supply and effectively manage its usage. District cooling is being promoted as a way of addressing energy shortages, energy demand, and global warming in the Middle East & Africa, and Asia Pacific

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 45%, Tier 2- 30%, and Tier 3- 25%

By Designation: C-Level- 35%, D-Level- 25%, and Others- 40%

By Region: North America- 27%, Europe- 20%, Asia Pacific- 33%,— 4%, and South America-8%, Middle East & Africa- 12%

Note: “Others” include sales managers, engineers, and regional managers

The tiers of the companies are defined based on their total revenue as of 2019: Tier 1: >USD 1 billion, Tier 2: USD 500 million–1 billion, and Tier 3:

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*Details on Business overview, District cooling projects, Recent Developments, Emirates central cooling system corporation (empower): Emirates central cooling systems: others, deals, MNM view might not be captured in case of unlisted companies.

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About

The report "District Cooling Market by Production Technique (Free Cooling, Absorption Cooling, Electric Chillers), Application (Commercial, Residential & Institutional), Region - Global Forecast to 2021", The market for district cooling is projected to grow from USD 5.14 Billion in 2016 to USD 9.54 Billion by 2021, at a CAGR of 13.19% from 2016 to 2021.

The various companies supplying district cooling and related products are as follows:

Emirates Central Cooling System Corporation (UAE)

National Central Cooling Company PJSC (UAE)

Emirates District Cooling LLC (UAE)

Shinryo Corporation (Japan)

ADC Energy Systems LLC (UAE)

Keppel DCHS PTE LTD (Singapore)

LOGSTOTR A/S (Denmark)

Ramboll Group A/S (Denmark)

SIEMENS AG (Germany)

Stellar Energy (U.S.)

District Cooling Company LLC (UAE) among others.

These companies are adopting strategies such as expansions, contracts, and acquisitions to strengthen their market position, increase their production capacity, and widen their customer base. For instance, acquisition of Palm Utilities and Palm District Cooling by Emirates Central Cooling Systems Corporation, the largest acquisition in the

district cooling industry.

This report segments the market for district cooling into production technique, application, and region, and provides the estimations for the overall value of the market and the subsegments across various regions. A detailed analysis of the key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, expansions, contracts & agreements, mergers & acquisitions, partnerships, agreements, joint ventures, and recent developments associated with the market for district cooling.

Breakdown of primaries:

Primary interviews were conducted with a number of industry experts in order to collect data related to different aspects of district cooling market. The distribution of primary interviews is as follows:

By Company: Tier 1 - 54%, Tier 2 - 33%, and Tier 3 - 13%

By Designation: Director level - 40%, C level - 47%, and Others - 13%

By Region: Middle East & Africa- 33%, North America – 25%, Europe- 17%, and Latin America - 8%

Emirates Central Cooling Systems Corporation (Empower), the leading district cooling company, adopted various strategies such as contracts & agreements and expansions to increase its production capacity. For instance, in January 2014, EMPOWER acquired Palm Utilities (Dubai, UAE) worth USD 500 million which enabled it to increase its production capacity and strengthen its market presence. . The company also underwent strategic expansions, by expanding its production capacities in Business Bay (Dubai, UAE). The company is strengthening its market, hold, and brand portfolio across UAE and is also expanding its operations to other nations such as the GCC countries.

National Central Cooling Company PJSC (Tabreed) is expanding its production capacity in GCC countries. The company is currently deepening its roots in GCC countries to exploit the potential of the district cooling market. For instance, National Central Cooling Company PJSC (Tabreed) signed a contract with Qatar Cool for the construction of a fourth district cooling plant in the State of Qatar in May 2014. This contract enable the company to expand its market and strengthen its foothold in GCC. In the coming years,

the company plans to expand its reach to other geographies with its experienced business units and rich brand portfolio.

The absorption cooling segment to be the fastest growing production technique in the district cooling market

The absorption cooling segment is estimated to be the most widely used production technique for meeting cooling demand as it utilizes waste energy. The absorption cooling segment accounted for the largest share in 2015 and is projected to grow at the highest rate during the forecast period. Absorption cooling is an environment-friendly means of cooling. It helps reduce the use of electrically driven cooling in the energy system and also reduces carbon dioxide emissions.

The commercial segment to account for the largest share of the district cooling market

The commercial segment accounted for the largest market share in 2015, owing to increasing demand for energy efficient cooling technologies for commercial buildings. Concerns over impact on the environment and rising energy prices has made the use of energy-efficient district cooling system a favorable solution for cooling in commercial spaces.

The Middle East & Africa region to play a key role in the growth of the market for district cooling

On the basis of region, the district cooling market is segmented into the Americas, Europe, Asia-Pacific, and the Middle East & Africa. The Middle East & Africa is a key market for district cooling. Development in the economies and the investment on infrastructure projects in this region have led to the high growth of this market. Growing affluent population, hot weather, and climate change concerns are some of the factors driving the district cooling market in the region.

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