

Heat Pump Water Heater Market by Type (Air-to-Air, Air-to-Water, Water Source, Geothermal, Hybrid), Storage Tank (Up to 500 L, 500-1,000 L, Above 1,000 L), Refrigerant Type (R410A, R407C, R744), Rated Capacity, End User Region - Global Forecast to 2028

<https://marketpublishers.com/r/HD08079CA57AEN.html>

Date: January 2024

Pages: 318

Price: US\$ 4,950.00 (Single User License)

ID: HD08079CA57AEN

Abstracts

The global heat pump water heater market is estimated to grow from USD 5.2 billion in 2023 to USD 10.2 billion by 2028; it is expected to record a CAGR of 14.4% during the forecast period. The growing demand for heat pump water heaters can be attributed to an increase in awareness for sustainable development. Consumers are becoming more environmentally conscious and are seeking energy-efficient and sustainable heating solutions. The majority of governments around the globe are implementing various policies and schemes to promote the adoption of energy-efficient technologies, including heat pump water heaters. These supportive regulations have helped to drive the market's growth and increase consumer interest in sustainable and green heating solutions.

“Upto 500 Litres Heat pump water heaters: The largest segment of the heat pump water heater market, by Storage Tank Capacity “

Based on Storage tank capacity, the heat pump water heater market is categorized into three categories: up to 500 liters, 500–1,000 liters, and above 1,000 liters. According to 2022, Up to 500 liters segment is expected to be the largest segment. The market for heat pump water heaters has a lot of units with 500-liter storage tanks since efficiency, usability, and customer demand have all been carefully balanced. Because it can optimally consume energy while efficiently supplying hot water for daily home demands, this particular capability has become more and more common. Data from the Energy Technology Systems Analysis Program of the International Energy Agency (IEA) show

that the average daily demand for hot water in homes in Europe is 24 liters per person. This indicates that heat pump water heaters larger than 500 liters are not always necessary for the residential sector, which makes them perfect for the home sector. The 500-liter tank achieves a balance that guarantees a plentiful supply of hot water without needless surplus, which could waste electricity. Its dimensions are in line with those of residential buildings, and it easily fits into the available places.

“By End user industry, Residential segment is expected to be the fastest growing segment during the forecast period.”

Based on the end user segment, the heat pump water heater market is segmented into three categories: residential, commercial, and industrial. The Residential segment is expected to be the fastest growing segment during the forecast period of 2023-2028 at a CAGR of 15.7%. These systems' compact design and adaptability not only make them ideal for a range of residential living spaces but they also highlight how well they integrate with a variety of architectural layouts and spatial restrictions. Installing heat pump water heaters in small apartments, roomy single-family homes, or multi-story buildings guarantees that the least amount of space is needed. The adaptability and compact design of these systems not only make them well-suited for a variety of living spaces within the residential sector but also underscore their versatility in seamlessly integrating with diverse architectural layouts and spatial constraints. Whether installed in compact apartments, spacious single-family homes, or multi-story residences, the compact footprint of heat pump water heaters ensures minimal space requirements. Growing demand for energy-efficient HVAC systems in urbanized areas, cost savings, environmental awareness have made the fastest growing market for residential in heat pump water heaters.

“North America is expected to be the second largest growing region in the heat pump water heater market.”

North America is expected to be the second largest region in the heat pump water heater market during the forecast period. North America is divided into the US, Canada, and Mexico. The North American heat pump market has expanded as demand for heating, ventilation, and air-conditioning (HVAC) systems has increased. Factors such as rising demand for ecologically friendly heating solutions, expansion of the residential and commercial building sectors, and technological advancements in heat pump water heaters are also contributing to market growth. It is utilized in a wide range of domestic, commercial, and industrial applications, including general manufacturing, chemical and petroleum, food and drinks, utilities, textile and leather, wood goods, metal, and others.

There are numerous government incentives for heat pump water heaters in North America. For instance, the federal tax credits up to 30% of the cost of the equipment, i.e., \$2,000 for heat pump water heaters, and there are also state-level or utility-level incentives available in many states.

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 and assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 60%, Tier 2- 25%, and Tier 3- 15%

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

By Region: North America- 36%, Europe- 19%, Asia Pacific- 33%, Rest of the World – 4%

Note: Others include sales managers, engineers, and regional managers.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The heat pump water heater market is dominated by a few major players that have a wide regional presence. The leading players in the heat pump water heater market are Panasonic Holding Corporation (Japan), LG Electronics (South Korea), Johnson Controls-Hitachi Air Conditioning (Japan), Mitsubishi Electric (Japan), and Trane Technologies (US). The major strategy adopted by the players includes new product launches, contracts, agreements, partnerships, joint ventures, acquisitions, and investments & expansions.

Research Coverage:

The report defines, describes, and forecasts the global heat pump water heater market by, source, technology, generation and delivery mode, application, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates in terms of

value, and future trends in the heat pump water heater market.

Key Benefits of Buying the Report

Government initiatives at the national and international levels amplify the impact of investment on the heat pump water heater market. Robust policy frameworks, often accompanied by financial incentives, subsidies, and regulatory support, encourage widespread adoption of heat pump water heaters for green hydrogen production. Factors such as high initial cost and lack of infrastructure restrain the growth of the market. The growing energy transition towards renewable energy sources and rapid urbanization are expected to present lucrative opportunities for the players operating in the heat pump water heater market.

Product Development/ Innovation: The heat pump water heater market is witnessing significant product development and innovation, driven by the growing demand for environmentally friendly, safe and sustainable products. Companies are investing in developing advanced heat pump water heater technologies for various applications.

Market Development: Panasonic Corporation partnered with Systemair on technology to launch heating and cooling products to offer its customers more options related to HVAC products, including heat pumps. Both companies will have their separate sales channels and branding for these products.

Market Diversification: Daikin Industries, Ltd. has recently established a new factory for heat pump units at the Ksawer?w Industrial Park in Lodz Province, Poland. The new production base will start operations in July 2024 to meet the rapidly increasing demand for heat pumps in Europe.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, like include Panasonic Holding Corporation (Japan), LG Electronics (South Korea), Johnson Controls-Hitachi Air Conditioning (Japan), Mitsubishi Electric (Japan), and Trane Technologies (US) among others in the heat pump water heater market

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