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HVAC Linesets Market by Material Type (Copper, Low Carbon), End-Use (Residential, Commercial, Industrial), Implementation (New Construction, Retrofit), and Region (APAC, North America, Europe, MEA, South America) - Global Forecast to 2026

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Abstracts

The global HVAC linesets market size is projected to reach USD 11.4 billion by 2026 at a CAGR of 10.0% from USD 7.1 billion in 2021. Urbanization and increase in residential construction, growing trends of smart homes, increasing demand for air conditioners, and significant growth in number of data centers and their power density are driving the market for HVAC linesets. However, local cooling solutions and rising environmental concerns are expected to restrain this market. Rising global temperatures and heat islands and growing income to propel the demand for HVAC systems are expected to offer significant growth opportunities to the manufacturers. Major challenges faced by players in this market are passive cooling and free cooling solutions and adoption to new refrigerants.

In terms of value, the carbon segment is projected to account for the largest share of the HVAC lineset market, by material type, during the forecast period.

Copper is the most preferred material among the lineset manufactures, for application in the HVAC industry. Some of the primary advantages of copper line sets for application in heating and cooling installations in all kinds of residential and commercial buildings are its malleability, easy to join, durable, and 100% recyclability. The copper material type is forecasted to dominate the HVAC market, due to the rising residential construction in the US, China, India, and Indonesia. Also, due to the COVID-19 the sales of split ACs increased in the US, as more and more people were operating in the work from homes scenario for which they needed a comfortable temperature

environment in their homes.

Commercial to be the largest end user during the forecast period.

In the commercial end-use industry, cooling solutions like air conditioners are primarily demanded by offices, hospitality sector, super markets & hypermarkets, banks, and data centers. The commercial end-use segment primarily uses low carbon steel based line sets, and require very high volumes of the same. The total volume of the HVAC lineset is much higher in case of commercial end-use industry, as compared to the residential one. This is due to the greater building area in commercial buildings, more free space to cool, and a greater number of connections of lineset.

Retrofit is projected to register the highest CAGR during the forecast period.

Retrofit projects are designed to integrate new components into existing HVAC networks. Retrofitting provides a more cost-effective way to improve system performance without the need to replace the entire system. The green building initiative and steps taken to reduce the adverse effects on the environment caused by old HVAC systems is boosting the adoption of new HVAC line sets in retrofits. When a major component in either the outdoor or indoor unit of a traditional heat pump system or air conditioner fails, both units should be replaced because newer equipment is carefully matched for optimal efficiency and operating pressures.

The APAC region leads the HVAC lineset market in terms of value.

APAC is the fastest-growing region for HVAC lineset market. The growth in demand for HVAC linesets in the region can be largely attributed to factors such as high population, increasing industrial growth, and stringent environmental norms. Moreover, the rising number of end-use industries in the region is also leading to innovations and developments in the field of HVAC lineset, thereby fueling the growth of the APAC HVAC lineset market.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the HVAC lineset market, and information was gathered from secondary research to determine and verify the market size of several segments.

- By Company Type: Tier 1 – 40%, Tier 2 – 35%, and Tier 3 – 25%

By Designation: C Level Executives– 35%, Directors – 40%, and Others – 25%

By Region: APAC – 40%, Europe – 10%, North America – 25%, the Middle East & Africa – 15%, and South America- 10%

Major players operating in the global HVAC lineset market include Daikin (Japan), Halcor (Greece), Hydro (Norway), KME SE (Italy), Mueller Streamline Co. (US), Cerro Flow Products LLC (US), JMF Company (US), Zhejiang Ice Loong Environmental Sci-Tech Co., Ltd (China), Feinrohren S.p.A. (Italy), DiversiTech Corporation (US), Foshan Shunde Lecong Hengxin Copper Tube Factory (China), Zhejiang Hailiang Co., Ltd. (China), Linesets Inc. (US), Cambridge-Lee Industries LLC (US), HMAX (US), ICool USA, Inc. (US), PDM US (US), MM Kembla (Australia), Mandev Tubes (India), Uniflow Copper Tubes (India), Kobelco & Materials Copper Tube Co., Ltd. (Japan), Mehta Tubes Limited (India), and Klima Industries (South Korea).

Research Coverage:

This report provides detailed segmentation of the HVAC lineset market based on material type, end-use industry, and implementation. Based on material type, the HVAC lineset market has been segmented into copper, low carbon, and others. Based on the end-use industry, the HVAC lineset market has been segmented into residential, commercial, and industrial. Based on the implementation, the HVAC lineset market has been segmented into new construction and retrofit.

Key Benefits of Buying the Report

From an insight perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market share ranking of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the HVAC lineset market; high growth regions; and market drivers, restraints, opportunities, and challenges.

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