

# **Air Duct Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material Type (Galvanized Steel, Aluminum, Fiberglass Polymers, and Others (Steel Metal Ducts, Flexible Non-Metallic Ducts, etc.)), By Shape Type (Round, Half Round, Square/Rectangular, Triangular, and Others (Oval, Customized Duct, etc.)), By End User (Residential, Commercial Buildings and Offices, Transportation and Public Infrastructure, Retail, Hospitality, Healthcare, Industrial, Others (Colleges, Universities, etc.)), By Region & Competition, 2021-2031F**

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## **Abstracts**

The global air duct market is projected to expand from USD 5.76 billion in 2025 to USD 7.28 billion by 2031, demonstrating a compound annual growth rate (CAGR) of 3.98%. These rigid or flexible conduits are crucial for HVAC systems, distributing conditioned air to ensure thermal comfort and uphold indoor air quality. The market's growth is primarily fueled by rapid urbanization and the implementation of strict building codes requiring energy-efficient ventilation in commercial and residential developments. For instance, U.S. gas warm air furnace shipments increased by 5.7% to about 2.74 million units by October 2025, highlighting consistent demand for HVAC components that rely on air duct networks. However, a significant obstacle is the unpredictable cost of raw materials like steel and aluminum, which causes financial instability for manufacturers and contractors, often resulting in project delays and reduced profit margins.

## Market Driver

Two key drivers are propelling the air duct market: rapid urbanization paired with global infrastructure development, and the enforcement of stringent energy efficiency regulations. Urban expansion and the proliferation of commercial and residential construction projects are significantly increasing demand for sophisticated HVAC distribution networks. This is evidenced by a 30% surge in Americas Commercial HVAC bookings for Trane Technologies by Q3 2025, directly linking urban development to the need for air distribution components. Simultaneously, stricter government regulations globally are pushing building owners to adopt high-performance ventilation solutions that reduce thermal loss and carbon footprints. This regulatory pressure is reflected in strong organic sales growth in Applied HVAC & Controls for Johnson Controls and record sales for Lindab International AB's Ventilation Systems, highlighting a sustained focus on upgrading air climate infrastructure with optimal sealing and flow control.

## Market Challenge

A primary challenge hindering the air duct market's growth is the unpredictable cost of raw materials, particularly steel and aluminum. This price volatility creates significant budgeting difficulties for manufacturers and contractors, fostering financial instability and eroding operational confidence. Such erratic fluctuations often lead to compressed profit margins and the postponement of crucial infrastructure projects, thereby limiting new ventilation system installations and reducing overall market liquidity. The scale of this instability is evident from August 2025 figures, showing a 22.8% year-over-year increase in the producer price index for aluminum mill shapes and a 13.1% rise for steel mill products, according to the Associated General Contractors of America. These substantial material cost escalations discourage investment in new commercial and residential developments, resulting in project delays that ultimately restrict global air duct market expansion.

## Market Trends

The air duct market is seeing two significant trends: the increasing adoption of pre-insulated non-metallic duct systems and the integration of IoT-enabled smart sensors. Pre-insulated systems, made from phenolic or polymer, are gaining traction due to their superior thermal efficiency and easier installation compared to conventional sheet metal, eliminating the need for separate insulation. These systems also significantly reduce air leakage and thermal bridging, proving especially beneficial for weight-

sensitive projects and retrofits, with Kingspan KoolDuct systems, for example, being up to 72% lighter than traditional alternatives, as noted by SMACNA in August 2025. Simultaneously, the integration of smart sensors into ductwork is transforming ventilation into intelligent, data-driven networks. Building operators are using connected velocity and pressure sensors within ducts to enable real-time airflow monitoring and demand-controlled ventilation, allowing for precise adjustments based on occupancy and optimizing energy use and indoor air quality. The 16.3% sales increase in Belimo's Sensors and Meters business line by July 2025 underscores the rising demand for technologies that digitize ventilation performance.

## Key Market Players

Lindab International AB

Johnson Controls International plc

Carrier Global Corporation

Daikin Industries, Ltd.

Trane Technologies plc

Systemair AB

FlaktGroup Holding GmbH

Zehnder Group AG

Aldes Group

Nortek Air Solutions, LLC

## Report Scope

In this report, the Global Air Duct Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Air Duct Market, By Material Type

Galvanized Steel

Aluminum

Fiberglass Polymers

Others

#### Air Duct Market, By Shape Type

Round

Half Round

Square/Rectangular

Triangular

Others

#### Air Duct Market, By End User

Residential

Commercial Buildings and Offices

Transportation and Public Infrastructure

Retail

Hospitality

Healthcare

Industrial

Others

## Air Duct Market, By Region

### North America

United States

Canada

Mexico

### Europe

France

United Kingdom

Italy

Germany

Spain

### Asia Pacific

China

India

Japan

Australia

South Korea

### South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Air Duct Market.

### **Available Customizations:**

Global Air Duct Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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