

Air Source Heat Pump Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Process (Air to Air (Ducts, Ductless), Air to Water (Split, Integrated)) By End Use (Residential, Hotels & Resorts, Gym & Spas, Education, Food Service, and Others (Healthcare, Offices, etc.)), By Sales Channel (Plumbers, Dealers & Contractors, Retail, Direct Sales, Online, and Others (Distributors, Builders, etc.)), By Region, Competition

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Abstracts

The global air source heat pump market is driven by the acceleration of climate change and the subsequent increase in the deployment of clean and sustainable energy solutions. The demand for alternative energy sources with increased efficiency and sustainability benefits has increased due to the rapid growth in the world's population and the increasing cost of gasoline. This has prompted significant industry players to launch R&D initiatives to create cutting-edge technologies and HVAC systems with lower carbon footprints and GHG emissions. For example, in June 2022, the maker of HVAC systems, Trane, introduced the Ascend model ACX. This first air-to-water heat pump enables households to seek decarbonization through electric cooling and heating. The most recent technology includes a heat pump and chiller technologies, providing residential structures with space heating and cooling features. The many economies' accelerating shift to a green economy could improve the industry outlook.

Over the past few years, policy support for heat pumps and necessary technology for heat decarbonization has increased in many countries. According to the International Energy Agency (IEA), in 2021, 190 million heat pump units were operating in buildings

globally. Over the past few years, the global stock of heat pumps has grown consistently, especially in the vital heating markets of North America, Europe, and northern and eastern Asia. Sales of heat pumps had record-high growth in 2021, particularly in Europe, China, and the United States. Despite supply chain issues, 2022 also exhibits early signs of robust growth. Energy security, especially in the European Union, is a significant driver for heat pumps outside of climate goals, with increased policy emphasis in 2022. Reversible heat pumps are used to meet an increasing need for space cooling, contributing to the deployment.

According to the IEA's report, global heat pump sales climbed by more than 13% in 2021. Sales in the European Union, where France, Italy, and Germany are the three biggest markets, increased by over 35% annually and surpassed 2.2 million units. The following most active markets for air-source heat pumps were China (up 13%), Japan (up 13%), and the United States (up 15%). With more than 60% of the global market share in 2021, air-source heat pumps dominate sales. Ground-source (or geothermal) heat pumps are more efficient at heating and cooling than air-source heat pumps. Still, because of their higher initial cost and the specialized knowledge and skills needed for installation, Heat Pumps only account for around 2.5% of global sales in the European Union.

Fluctuations in Temperature Across the Globe are Fueling the Market Growth

Temperature variations among different regions, as a significant element, are influencing the need for air-source heat pumps. Rising CO₂ levels have brought extreme climate changes in numerous economies worldwide, which is driving up the demand for effective heating and cooling systems. For instance, Canada's northwest territories experienced their coldest day in December 2021 when the temperature dropped to minus -51°C. On the other side, Louisburg and Nova Scotia in Canada had the day's hottest temperatures (averaging 4.6°C). The air source heat pump market landscape will be improved by the deliberate switch from fossil fuel-powered boilers toward low carbon heat pumps due to its capacity to operate over a wide range of temperatures to service heating & cooling needs efficiently.

Increasing Government Initiatives are Fueling the Market Growth

The global market for air source heat pumps is growing due to the adoption of a clear legal framework and the availability of financial assistance programs, including tax benefits, rebates, and subsidies. To minimize their carbon footprint, the governments of many nations are investing in and taking steps to promote the market for air-source heat

pumps. Europe's market is expanding due to its efforts to adopt a tougher regulation framework, new heat pump programs, and profitable national goals that complement the sector's growth. For instance, Germany unveiled the Energy Efficiency Work Plan, which outlines its plans to construct over 500,000 heat pump units by 2024 and over 800,000 units annually following the implementation of the heat pump mandate. Additionally, the nation intends to stop funding construction and gas heating projects that do not meet the new Efficiency House 40 requirement. The region's strict regulatory framework will boost the adoption of products in the area.

Energy Efficiency of Heat Pumps is Aiding the Market Growth

Because they don't require a lot of electricity to operate, air-source heat pumps aid in energy conservation. A correctly designed air-source heat pump can provide a home with up to three times as much heat as the electrical energy it uses, according to the US Department of Energy. This is feasible because a heat pump transfer heat rather than converting it from a combustion heating system that uses fuel. The Northeast Energy Efficiency Partnerships found that installing an air-source heat pump resulted in annual savings of about 3,000 kWh (or USD459), compared to electric resistance heaters and 6,200 kWh (or USD948), compared to oil systems when entire units were replaced in the Northeast and Mid-Atlantic regions. The average annual savings are close to 3,000 kWh when replacing oil (i.e., the oil system is kept but uses less energy) (or about USD300). Future market growth is anticipated to be boosted by these reasons.

Poor Maintenance and Installation are Hindering the Market Growth

Poor installation, duct losses, and inadequate maintenance are a few challenges preventing the global market for air-source heat pumps from expanding. Most heat pumps have serious installation or maintenance concerns, which reduces their effectiveness and performance. Over 50% of heat pumps have significant issues with insufficient airflow, leaky ducts, and incorrect refrigerant charge. Heat pumps' performance will deteriorate if regular maintenance and servicing are not performed. These factors are anticipated to restrain the market's expansion for air-source heat pumps.

Market Segmentation

The global air source heat pump market is segmented into the process, end use, sales channel, region, and company. Based on the process, the market is segmented into air-to-air (ducts, ductless) and air-to-water (split, integrated). Based on end use, the market

is divided into residential, hotels & resorts, gyms & spas, education, food service, and others (Healthcare, Offices, etc.). Based on sales channel, the market is fragmented into plumbers, dealers & contractors, retail, direct sales, online, and others (Distributors, Builders, etc.). The market analysis also studies the regional segmentation, divided among North America, Europe, Asia-Pacific, South America, and Middle East & Africa.

Company Profiles

Vaillant Group, Swegon Group AB, Robert Bosch GmbH, Trane Technologies Company, LLC, NIBE Industrier AB, Corp., Rheem Manufacturing Company, Viessmann Group, A. O. Smith Corporation, DAIKIN INDUSTRIES, Ltd., Carrier Global Corporation, are among the major market players in the global platform that lead the market growth of the global air source heat pump market.

Report Scope:

In this report, the global air source heat pump market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

Global Air Source Heat Pump Market, By Process:

Air-to-Air

Air-to-Water

Global Air Source Heat Pump Market, By End Use:

Residential

Hotels & Resorts

Gym & Spas

Education

Food Service

Others

Global Air Source Heat Pump Market, By Sales Channel:

Plumbers

Dealers & Contractors

Retail

Direct Sales

Online

Others

Air Source Heat Pump Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

United Kingdom

Italy

Spain

Norway

Sweden

Asia-Pacific

China

India

Japan

South Korea

Australia

New Zealand

Finland

Middle East & Africa

Saudi Arabia

South Africa

UAE

Qatar

Kuwait

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global Air Source Heat Pump market.

Available Customizations:

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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16.1. Import of Top 5 Countries

16.1.1. By Value

16.2. Export of Top 5 Countries

16.2.1. By Value

17. COMPETITIVE LANDSCAPE

17.1. Company Profiles

17.1.1. Vaillant Group

17.1.1.1. Company Details

17.1.1.2. Products & Services

17.1.1.3. Financial (As Reported)

17.1.1.4. Key Market Focus & Geographical Presence

17.1.1.5. Recent Development

17.1.1.6. Key Management Personnel

17.1.2. Swegon Group AB

17.1.2.1. Company Details

17.1.2.2. Products & Services

17.1.2.3. Financial (As Reported)

17.1.2.4. Key Market Focus & Geographical Presence

17.1.2.5. Recent Development

17.1.2.6. Key Management Personnel

17.1.3. Robert Bosch GmbH

17.1.3.1. Company Details

17.1.3.2. Products & Services

17.1.3.3. Financial (As Reported)

17.1.3.4. Key Market Focus & Geographical Presence

17.1.3.5. Recent Development

17.1.3.6. Key Management Personnel

17.1.4. Trane Technologies Company, LLC

17.1.4.1. Company Details

17.1.4.2. Products & Services

17.1.4.3. Financial (As Reported)

17.1.4.4. Key Market Focus & Geographical Presence

17.1.4.5. Recent Development

17.1.4.6. Key Management Personnel

17.1.5. NIBE Industrier AB, Corp.

- 17.1.5.1. Company Details
- 17.1.5.2. Products & Services
- 17.1.5.3. Financial (As Reported)
- 17.1.5.4. Key Market Focus & Geographical Presence
- 17.1.5.5. Recent Development
- 17.1.5.6. Key Management Personnel
- 17.1.6. Rheem Manufacturing Company
 - 17.1.6.1. Company Details
 - 17.1.6.2. Products & Services
 - 17.1.6.3. Financial (As Reported)
 - 17.1.6.4. Key Market Focus & Geographical Presence
 - 17.1.6.5. Recent Development
 - 17.1.6.6. Key Management Personnel
- 17.1.7. Viessmann Group
 - 17.1.7.1. Company Details
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 - 17.1.7.3. Financial (As Reported)
 - 17.1.7.4. Key Market Focus & Geographical Presence
 - 17.1.7.5. Recent Development
 - 17.1.7.6. Key Management Personnel
- 17.1.8. A. O. Smith Corporation
 - 17.1.8.1. Company Details
 - 17.1.8.2. Products & Services
 - 17.1.8.3. Financial (As Reported)
 - 17.1.8.4. Key Market Focus & Geographical Presence
 - 17.1.8.5. Recent Development
 - 17.1.8.6. Key Management Personnel
- 17.1.9. DAIKIN INDUSTRIES, Ltd.
 - 17.1.9.1. Company Details
 - 17.1.9.2. Products & Services
 - 17.1.9.3. Financial (As Reported)
 - 17.1.9.4. Key Market Focus & Geographical Presence
 - 17.1.9.5. Recent Development
 - 17.1.9.6. Key Management Personnel
- 17.1.10. Carrier Global Corporation
 - 17.1.10.1. Company Details
 - 17.1.10.2. Products & Services
 - 17.1.10.3. Financial (As Reported)
 - 17.1.10.4. Key Market Focus & Geographical Presence

17.1.10.5. Recent Development

17.1.10.6. Key Management Personnel

18. STRATEGIC RECOMMENDATIONS/ACTION PLAN

18.1. Key Focus Areas

18.2. Target Regions & Countries

18.3. Target Process

18.4. Target Sales Channel

(Note: The companies list can be customized based on the client requirements.)

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