

Energy Retrofit Systems Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Quick Wins Retrofit, Deep Retrofit), By Product (Envelope, LED Retrofit Lighting, HVAC Retrofit, Appliances), By Application (Residential, Non-Residential), By Region, and By Competition, 2018-2028

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Abstracts

The Global Energy Retrofit Systems Market is experiencing a transformative surge driven by a collective commitment to sustainability, regulatory imperatives, and economic incentives. As nations strive to meet stringent carbon reduction targets, the market witnesses a growing demand for retrofit solutions that enhance energy efficiency in existing buildings. Led by segments such as LED Retrofit Lighting and Deep Retrofit, the market thrives on technological advancements, with smart building systems and IoT integration playing a pivotal role. Non-residential applications, including commercial and industrial structures, dominate as businesses recognize the economic benefits and regulatory compliance inherent in comprehensive retrofit initiatives. The market's dynamics are further shaped by a complex regulatory landscape, with governments worldwide offering financial incentives to encourage the adoption of energy retrofit systems. As a cornerstone of the broader sustainability agenda, the Global Energy Retrofit Systems Market stands poised for sustained growth, driven by a global paradigm shift towards eco-friendly, energy-efficient built environments. With ongoing innovations and a heightened focus on corporate responsibility, the market is positioned to play a crucial role in reshaping the future of the global construction and energy industries.

Key Market Drivers

Growing Emphasis on Sustainable Development and Climate Action

A key driver propelling the global Energy Retrofit Systems market is the escalating emphasis on sustainable development and climate action. As nations strive to meet international commitments to reduce greenhouse gas emissions and combat climate change, energy retrofitting emerges as a pivotal solution for existing buildings. The building sector, accounting for a significant portion of energy consumption and emissions, is under increased scrutiny to improve efficiency and environmental performance.

Energy retrofit systems play a crucial role in aligning buildings with sustainable development goals. These systems encompass a spectrum of upgrades, including improved insulation, energy-efficient lighting, advanced heating, ventilation, and air conditioning (HVAC) systems, and smart building technologies. By enhancing energy efficiency and reducing carbon footprints, energy retrofitting contributes to broader sustainability initiatives, making it a driving force in the global movement towards green, resilient, and environmentally responsible infrastructure.

As nations worldwide intensify their commitment to sustainability, the demand for energy retrofit systems is set to rise, positioning the market as a key player in the collective effort to address climate change and create a more sustainable future.

Economic Benefits and Cost Savings Propel Adoption of Energy Retrofit Systems

A compelling driver propelling the global Energy Retrofit Systems market is the realization of significant economic benefits and cost savings associated with retrofit projects. While the upfront investment in retrofitting existing buildings may be substantial, the long-term financial gains are substantial and extend beyond energy savings.

Energy-efficient systems, including upgraded insulation, lighting, and HVAC systems, result in reduced energy consumption, leading to lower utility bills. Additionally, the extended lifespan of retrofit technologies contributes to decreased maintenance and replacement costs. Businesses and property owners recognize the economic advantages of energy retrofitting, making it an attractive proposition for enhancing the financial performance of buildings and facilities.

Governments and utilities, recognizing the economic benefits at both individual and

societal levels, often offer financial incentives, tax credits, and subsidies to encourage the adoption of energy retrofit systems. This synergy between economic benefits and supportive policies amplifies the market's growth potential, fostering a positive economic environment for widespread adoption.

Regulatory Support and Mandates for Energy Efficiency

Regulatory support and mandates for energy efficiency represent a formidable driver fueling the global Energy Retrofit Systems market. Governments worldwide are enacting stringent regulations and standards aimed at enhancing energy efficiency in buildings, with a focus on reducing carbon emissions and minimizing environmental impact. These regulatory measures create a conducive environment for the adoption of energy retrofit technologies, as property owners and businesses strive to comply with established norms.

Building codes and standards that mandate energy performance improvements drive retrofit investments, as non-compliance may result in penalties or restrictions on property usage. In addition to regulatory pressure, governments often provide financial incentives, tax breaks, and subsidies to facilitate compliance and encourage proactive energy efficiency measures.

This regulatory framework acts as a powerful catalyst, compelling stakeholders across industries to prioritize energy retrofit projects. It not only contributes to meeting national energy efficiency goals but also positions energy retrofit systems as essential components in achieving broader sustainability and environmental objectives.

Technological Advancements Enhance the Efficacy of Energy Retrofit Systems

Technological advancements play a pivotal role in driving the global Energy Retrofit Systems market forward. The continuous evolution of building technologies, materials, and smart systems enhances the efficacy of energy retrofit solutions. Advanced sensors, Internet of Things (IoT) devices, and artificial intelligence contribute to precise monitoring, data analysis, and automation, optimizing the performance of retrofitted buildings.

Smart building management systems enable real-time monitoring of energy consumption, occupant behavior, and environmental conditions. This data-driven approach allows for more accurate identification of inefficiencies and tailored retrofit strategies. Additionally, innovations in building materials and construction methods

contribute to the development of more efficient and sustainable retrofit solutions.

As technological advancements continue to unfold, the Energy Retrofit Systems market is positioned to benefit from ongoing research and development, fostering a cycle of continuous improvement. The integration of cutting-edge technologies not only enhances energy efficiency but also elevates the market's contribution to creating intelligent, adaptive, and environmentally conscious built environments.

Escalating Urbanization and the Need for Energy-Efficient Cities

The global trend of escalating urbanization is a significant driver propelling the Energy Retrofit Systems market. As populations concentrate in urban areas, there is a corresponding increase in the demand for energy-efficient infrastructure to support sustainable and resilient cities. Existing buildings, often characterized by outdated systems and inefficient designs, require retrofitting to meet the energy demands of growing urban populations while minimizing environmental impact.

Energy retrofit systems play a crucial role in revitalizing urban infrastructure, contributing to the creation of smart cities that prioritize energy efficiency and environmental sustainability. Governments and municipal authorities, recognizing the importance of efficient infrastructure in managing urban growth, are increasingly investing in retrofit projects to enhance the performance of existing buildings and mitigate the environmental footprint of urban development.

Key Market Challenges

Upfront Cost Barriers and Return on Investment Uncertainty in Energy Retrofit Systems Market

One of the primary challenges faced by the global Energy Retrofit Systems market is the significant upfront cost associated with implementing retrofit projects. The comprehensive nature of energy retrofitting, which may involve upgrades to insulation, HVAC systems, lighting, and building envelopes, often requires substantial capital investment. This poses a hurdle for many property owners and businesses, particularly in sectors with thin profit margins or limited access to financial resources.

The uncertainty surrounding the return on investment (ROI) further complicates the decision-making process. While energy retrofit projects promise long-term cost savings through reduced energy consumption, the time it takes to recoup the initial investment

can be a deterrent. Convincing stakeholders about the financial viability of retrofitting remains a persistent challenge, necessitating effective communication of the long-term benefits and economic advantages of such initiatives.

Lack of Awareness and Information Dissemination

A crucial challenge hindering the widespread adoption of Energy Retrofit Systems is the lack of awareness among property owners, businesses, and even policymakers. Many stakeholders may not fully comprehend the potential energy and cost savings offered by retrofitting, leading to a lack of interest or proactive investment in such projects. Additionally, misconceptions about the complexity and disruptions associated with retrofitting may contribute to hesitancy in embracing these solutions.

Addressing this challenge requires comprehensive awareness campaigns, educational initiatives, and knowledge dissemination about the benefits of energy retrofitting. Governments, industry associations, and energy efficiency advocates must collaborate to bridge the information gap and empower stakeholders with the understanding needed to make informed decisions about retrofit investments.

Complex Regulatory Landscape and Inconsistent Standards

The global Energy Retrofit Systems market faces challenges arising from a complex regulatory landscape and inconsistent standards across different regions. Regulations governing energy efficiency vary widely, creating a fragmented environment where property owners and businesses may encounter difficulties navigating compliance requirements. Inconsistencies in standards can lead to confusion and hinder the development of standardized retrofit practices.

To overcome this challenge, there is a need for harmonization of energy efficiency standards and the establishment of clear, universally accepted guidelines for retrofit projects. Governments and regulatory bodies should collaborate on creating a cohesive framework that streamlines the approval process, ensures compliance, and facilitates the implementation of energy retrofit systems on a global scale.

Technological and Infrastructural Limitations in Retrofit Implementation

The implementation of Energy Retrofit Systems is often impeded by technological and infrastructural limitations. Older buildings, in particular, may pose challenges due to outdated construction methods, incompatible systems, and limited space for retrofit

installations. Integrating advanced technologies, such as smart building management systems or IoT devices, may require substantial modifications to existing infrastructure, presenting logistical challenges.

Overcoming technological limitations requires innovation in retrofitting solutions that are adaptable to diverse building types and ages. Collaboration between technology developers, retrofit specialists, and building owners is essential to identify and implement solutions that can seamlessly integrate with existing structures, ensuring the feasibility and success of retrofit projects across a wide range of buildings.

Funding and Financial Mechanisms for Energy Retrofit Projects

Securing adequate funding for energy retrofit projects poses a significant challenge in the global market. Despite the potential long-term cost savings, property owners and businesses may face difficulty in accessing financing options for retrofit initiatives. Traditional lenders may be hesitant due to uncertainties surrounding the returns on investment and the extended payback periods associated with retrofit projects.

Key Market Trends

Growing Embrace of Sustainable Practices Drives Demand for Energy Retrofit Systems

The global Energy Retrofit Systems market is experiencing a significant trend driven by a growing global emphasis on sustainable practices. As concerns about climate change and environmental sustainability escalate, governments, businesses, and individuals are increasingly recognizing the need to reduce energy consumption in existing buildings and infrastructure. Energy retrofitting emerges as a crucial solution to enhance energy efficiency and reduce carbon footprints. This trend is particularly pronounced in developed regions where there is a strong commitment to meeting climate goals and reducing reliance on traditional energy sources.

Energy retrofit systems offer a holistic approach to upgrading existing buildings, encompassing improvements in insulation, lighting, HVAC systems, and overall building envelope. These systems not only contribute to environmental conservation but also align with corporate social responsibility initiatives. Companies are investing in retrofit projects to showcase their commitment to sustainability, attract environmentally conscious consumers, and comply with evolving regulations focused on energy efficiency.

As the demand for sustainable solutions continues to rise, the Energy Retrofit Systems market is poised for significant growth. The integration of advanced technologies, such as smart building management systems, into retrofit projects further enhances their effectiveness, making them an integral part of the global movement toward greener and more energy-efficient infrastructure.

Technological Advancements and Digitalization Transform Energy Retrofit Systems

The Energy Retrofit Systems market is witnessing a transformative trend driven by rapid technological advancements and the integration of digital solutions. Digitalization is revolutionizing how retrofit projects are conceptualized, implemented, and monitored. Advanced technologies, including Internet of Things (IoT), Artificial Intelligence (AI), and Building Information Modeling (BIM), are playing a pivotal role in optimizing energy retrofit processes.

IoT-enabled sensors and devices are deployed to gather real-time data on energy usage, occupancy patterns, and environmental conditions within buildings. AI algorithms analyze this data to identify areas of inefficiency and recommend targeted retrofit solutions. BIM facilitates the creation of virtual models for precise planning and execution of retrofit projects, enabling stakeholders to visualize the impact of proposed changes before implementation.

The integration of these technologies not only enhances the precision and effectiveness of energy retrofit systems but also contributes to ongoing energy management. Building owners and facility managers can remotely monitor and control energy usage, identify potential issues, and implement continuous improvements. This trend is reshaping the Energy Retrofit Systems market, positioning it at the forefront of the broader digital transformation in the construction and building management sectors.

Policy Support and Incentives Propel Energy Retrofit Investments

Government policies and incentives play a crucial role in shaping the Energy Retrofit Systems market, driving a trend where increased policy support leads to greater investments in retrofit projects. Recognizing the pivotal role of energy efficiency in achieving sustainability goals, many governments are implementing measures to encourage businesses and individuals to undertake retrofit initiatives.

Incentives such as tax credits, grants, and subsidies are designed to alleviate the upfront costs associated with energy retrofit projects, making them more financially

appealing. Additionally, governments may introduce regulatory frameworks that mandate energy efficiency standards for existing buildings, compelling property owners to invest in retrofit measures to comply with these standards.

This trend is particularly evident in regions where environmental consciousness is high, and governments are committed to mitigating the impact of climate change. The convergence of policy support and financial incentives fosters a conducive environment for increased adoption of Energy Retrofit Systems, positioning them as essential components of broader sustainability initiatives.

Escalating Focus on Resilient and Smart Infrastructure Drives Retrofit Investments

The global Energy Retrofit Systems market is experiencing a trend shaped by an escalating focus on building resilient and smart infrastructure. As urbanization intensifies and the frequency of extreme weather events increases, there is a growing recognition of the need to retrofit existing buildings to withstand changing environmental conditions and to integrate smart technologies for improved functionality.

Resilient retrofitting involves enhancing a building's ability to withstand and recover from natural disasters, including floods, earthquakes, and hurricanes. This may involve structural improvements, the use of resilient materials, and the integration of backup power systems. The emphasis on resilience is driven by the desire to ensure business continuity, protect investments in infrastructure, and safeguard the well-being of occupants.

Simultaneously, the demand for smart infrastructure is driving investments in retrofit projects that incorporate IoT devices, automation, and data analytics. Smart building technologies enable real-time monitoring, predictive maintenance, and enhanced occupant comfort. As a result, the Energy Retrofit Systems market is evolving to address not only energy efficiency but also the broader goals of resilience and smart infrastructure in response to the complex challenges of the modern built environment.

Escalating Urbanization and Aging Infrastructure Fuel Retrofit Opportunities

The global trend of rapid urbanization, coupled with aging infrastructure, is presenting a significant growth opportunity for the Energy Retrofit Systems market. Many urban areas are grappling with the challenges of outdated buildings and infrastructure that do not meet modern energy efficiency standards. As populations concentrate in cities, there is a heightened focus on revitalizing existing structures to accommodate

increased demand for energy while minimizing environmental impact.

Aging infrastructure poses challenges related to energy inefficiency, outdated technologies, and the need for compliance with current building codes and environmental standards. Retrofitting offers a viable solution to modernize these structures, making them more energy-efficient, environmentally friendly, and aligned with contemporary technological advancements. Governments and municipalities are recognizing the potential of retrofitting to enhance the sustainability and functionality of urban infrastructure.

Segmental Insights

Type Insights

Deep Retrofit segment dominates in the global energy retrofit systems market in 2022. Deep Retrofit involves a holistic and integrated approach, encompassing upgrades to building envelopes, insulation, heating, ventilation, and air conditioning (HVAC) systems, lighting, and often incorporating smart building technologies. The aim is to achieve significant energy savings and reduce environmental impact by transforming the entire building's infrastructure. This approach aligns with the growing awareness of the urgency to make substantial changes in the way buildings consume energy, particularly in the face of escalating concerns about carbon emissions and resource depletion.

The Deep Retrofit segment gains prominence due to its ability to deliver more substantial and enduring results compared to Quick Wins Retrofit. While Quick Wins Retrofit focuses on immediate, low-cost interventions to improve energy efficiency, such as upgrading lighting or optimizing heating controls, it may not address the fundamental structural and system deficiencies that contribute to a building's overall energy inefficiency. In contrast, Deep Retrofit aims to provide a more enduring solution by overhauling and modernizing the building's essential components.

The dominance of the Deep Retrofit segment is further accentuated by the long-term economic benefits it offers. Although the initial investment for Deep Retrofit projects tends to be higher, the consequential energy savings, reduced operational costs, and enhanced property value contribute to a more compelling return on investment over time. Businesses and property owners increasingly recognize the value of making substantial, future-proof investments that align with sustainability objectives, making the Deep Retrofit approach more appealing.

Moreover, as governments and regulatory bodies worldwide implement stricter energy efficiency standards and carbon reduction targets, the Deep Retrofit segment gains momentum. Many of these regulations incentivize or mandate deep energy retrofits as a means to achieve meaningful and quantifiable reductions in overall energy consumption and carbon emissions. Governments often offer financial incentives, subsidies, and favorable financing terms to encourage property owners and businesses to embrace comprehensive retrofit initiatives.

Product Insights

LED Retrofit Lighting segment dominates in the global energy retrofit systems market in 2022. LED Retrofit Lighting holds a pivotal position in energy retrofit initiatives due to its unparalleled energy efficiency, longer lifespan, and adaptability to diverse applications. LEDs have revolutionized the lighting industry by providing a highly efficient alternative to traditional incandescent and fluorescent lighting technologies. The remarkable energy savings offered by LEDs, often exceeding 50% compared to conventional lighting, make them a compelling choice for businesses, municipalities, and homeowners seeking to reduce their carbon footprint and energy costs.

The adaptability of LED Retrofit Lighting to various settings, including residential, commercial, and industrial spaces, further solidifies its dominance. LED technology allows for customizable color temperatures, brightness levels, and form factors, providing a versatile solution for different lighting requirements. From retrofitting streetlights and office spaces to residential homes, the LED Retrofit Lighting segment offers a comprehensive and adaptable solution that addresses the diverse needs of the market.

The global emphasis on sustainability and environmental responsibility plays a significant role in driving the dominance of LED Retrofit Lighting. Governments, businesses, and consumers worldwide are increasingly committed to reducing energy consumption and greenhouse gas emissions. LED retrofit projects align seamlessly with these goals, providing an effective means to achieve immediate energy savings and contribute to broader sustainability initiatives.

Regulatory support and incentives also contribute to the prominence of LED Retrofit Lighting in the market. Many governments have implemented regulations phasing out traditional, energy-intensive lighting technologies and encouraging the adoption of energy-efficient alternatives. Financial incentives, subsidies, and favorable financing

terms for LED retrofit projects further bolster their dominance, making the transition to sustainable lighting economically appealing for a wide range of stakeholders.

Regional Insights

Europe dominates the Global Energy Retrofit Systems Market in 2022. Firstly, Europe has been at the forefront of advocating for and implementing stringent environmental regulations and energy efficiency standards. The European Union (EU) has set ambitious targets to reduce carbon emissions and improve energy efficiency, compelling member states to prioritize retrofitting existing buildings. Stringent building codes and regulations mandate energy performance improvements, driving the demand for energy retrofit systems across residential, commercial, and public infrastructure.

Moreover, European countries have actively embraced the concept of sustainable development, with a strong focus on reducing the environmental impact of urbanization and infrastructure. As a result, energy retrofitting has become an integral part of urban planning and development strategies. Cities across Europe are investing heavily in retrofit projects to transform existing buildings into energy-efficient, eco-friendly structures, aligning with broader goals of creating smart and sustainable urban environments.

The availability of financial incentives and support mechanisms also contributes to Europe's dominance in the Energy Retrofit Systems Market. Governments in the region offer a range of incentives, including grants, subsidies, and favorable financing options, to encourage property owners and businesses to undertake retrofit projects. These financial inducements mitigate the upfront costs associated with retrofitting, making it more economically viable for a broader range of stakeholders.

Furthermore, the cultural and societal emphasis on environmental responsibility in Europe plays a crucial role. The awareness and commitment of European consumers, businesses, and governments to sustainable practices create a robust demand for energy retrofit solutions. This cultural mindset extends to corporate sustainability goals, where businesses prioritize green initiatives, including energy-efficient building upgrades, as part of their corporate social responsibility strategies.

Collaboration and knowledge-sharing within the European Union also contribute to its dominance in the Energy Retrofit Systems Market. The exchange of best practices, technological innovations, and successful case studies among member states fosters a conducive environment for the growth of the retrofit market. This collaborative approach

ensures that lessons learned in one region can be applied and adapted elsewhere, accelerating the adoption of energy retrofit systems across Europe.

Key Market Players

Daikin Industries, Ltd.

Ameresco, Inc.

Eaton Corporation PLC

AECOM Technical Services, Inc.

Johnson Controls International PLC

Siemens AG

Schneider Electric SE

Orion Energy Systems, Inc.

Trane Technologies plc

Signify N.V.

Report Scope:

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

Energy Retrofit Systems Market, By Type:

Quick Wins Retrofit

Deep Retrofit

Energy Retrofit Systems Market, By Product:

Envelope

LED Retrofit Lighting

HVAC Retrofit

Appliances

Energy Retrofit Systems Market, By Application:

Residential

Non-Residential

Energy Retrofit Systems Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Energy Retrofit Systems Market.

Available Customizations:

Global Energy Retrofit Systems Market report with the given market data, Tech Sci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL ENERGY RETROFIT SYSTEMS MARKET

5. VOICE OF CUSTOMER

6. GLOBAL ENERGY RETROFIT SYSTEMS MARKET OVERVIEW

7. GLOBAL ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type (Quick Wins Retrofit, Deep Retrofit)
 - 7.2.2. By Product (Envelope, LED Retrofit Lighting, HVAC Retrofit, Appliances)
 - 7.2.3. By Application (Residential, Non-Residential)

- 7.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.3. By Company (2022)
- 7.4. Market Map

8. NORTH AMERICA ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Type

8.2.2. By Product

8.2.3. By Application

8.2.4. By Country

8.2.4.1. United States Energy Retrofit Systems Market Outlook

8.2.4.1.1. Market Size & Forecast

8.2.4.1.1.1. By Value

8.2.4.1.2. Market Share & Forecast

8.2.4.1.2.1. By Type

8.2.4.1.2.2. By Product

8.2.4.1.2.3. By Application

8.2.4.2. Canada Energy Retrofit Systems Market Outlook

8.2.4.2.1. Market Size & Forecast

8.2.4.2.1.1. By Value

8.2.4.2.2. Market Share & Forecast

8.2.4.2.2.1. By Type

8.2.4.2.2.2. By Product

8.2.4.2.2.3. By Application

8.2.4.3. Mexico Energy Retrofit Systems Market Outlook

8.2.4.3.1. Market Size & Forecast

8.2.4.3.1.1. By Value

8.2.4.3.2. Market Share & Forecast

8.2.4.3.2.1. By Type

8.2.4.3.2.2. By Product

8.2.4.3.2.3. By Application

9. EUROPE ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Product
 - 9.2.3. By Application
 - 9.2.4. By Country
 - 9.2.4.1. Germany Energy Retrofit Systems Market Outlook
 - 9.2.4.1.1. Market Size & Forecast
 - 9.2.4.1.1.1. By Value
 - 9.2.4.1.2. Market Share & Forecast
 - 9.2.4.1.2.1. By Type
 - 9.2.4.1.2.2. By Product
 - 9.2.4.1.2.3. By Application
 - 9.2.4.2. France Energy Retrofit Systems Market Outlook
 - 9.2.4.2.1. Market Size & Forecast
 - 9.2.4.2.1.1. By Value
 - 9.2.4.2.2. Market Share & Forecast
 - 9.2.4.2.2.1. By Type
 - 9.2.4.2.2.2. By Product
 - 9.2.4.2.2.3. By Application
 - 9.2.4.3. United Kingdom Energy Retrofit Systems Market Outlook
 - 9.2.4.3.1. Market Size & Forecast
 - 9.2.4.3.1.1. By Value
 - 9.2.4.3.2. Market Share & Forecast
 - 9.2.4.3.2.1. By Type
 - 9.2.4.3.2.2. By Product
 - 9.2.4.3.2.3. By Application
 - 9.2.4.4. Italy Energy Retrofit Systems Market Outlook
 - 9.2.4.4.1. Market Size & Forecast
 - 9.2.4.4.1.1. By Value
 - 9.2.4.4.2. Market Share & Forecast
 - 9.2.4.4.2.1. By Type
 - 9.2.4.4.2.2. By Product
 - 9.2.4.4.2.3. By Application
 - 9.2.4.5. Spain Energy Retrofit Systems Market Outlook
 - 9.2.4.5.1. Market Size & Forecast
 - 9.2.4.5.1.1. By Value
 - 9.2.4.5.2. Market Share & Forecast
 - 9.2.4.5.2.1. By Type

9.2.4.5.2.2. By Product

9.2.4.5.2.3. By Application

10. SOUTH AMERICA ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Product

10.2.3. By Application

10.2.4. By Country

10.2.4.1. Brazil Energy Retrofit Systems Market Outlook

10.2.4.1.1. Market Size & Forecast

10.2.4.1.1.1. By Value

10.2.4.1.2. Market Share & Forecast

10.2.4.1.2.1. By Type

10.2.4.1.2.2. By Product

10.2.4.1.2.3. By Application

10.2.4.2. Colombia Energy Retrofit Systems Market Outlook

10.2.4.2.1. Market Size & Forecast

10.2.4.2.1.1. By Value

10.2.4.2.2. Market Share & Forecast

10.2.4.2.2.1. By Type

10.2.4.2.2.2. By Product

10.2.4.2.2.3. By Application

10.2.4.3. Argentina Energy Retrofit Systems Market Outlook

10.2.4.3.1. Market Size & Forecast

10.2.4.3.1.1. By Value

10.2.4.3.2. Market Share & Forecast

10.2.4.3.2.1. By Type

10.2.4.3.2.2. By Product

10.2.4.3.2.3. By Application

11. MIDDLE EAST & AFRICA ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

- 11.2.1. By Type
- 11.2.2. By Product
- 11.2.3. By Application
- 11.2.4. By Country
 - 11.2.4.1. Saudi Arabia Energy Retrofit Systems Market Outlook
 - 11.2.4.1.1. Market Size & Forecast
 - 11.2.4.1.1.1. By Value
 - 11.2.4.1.2. Market Share & Forecast
 - 11.2.4.1.2.1. By Type
 - 11.2.4.1.2.2. By Product
 - 11.2.4.1.2.3. By Application
 - 11.2.4.2. UAE Energy Retrofit Systems Market Outlook
 - 11.2.4.2.1. Market Size & Forecast
 - 11.2.4.2.1.1. By Value
 - 11.2.4.2.2. Market Share & Forecast
 - 11.2.4.2.2.1. By Type
 - 11.2.4.2.2.2. By Product
 - 11.2.4.2.2.3. By Application
 - 11.2.4.3. South Africa Energy Retrofit Systems Market Outlook
 - 11.2.4.3.1. Market Size & Forecast
 - 11.2.4.3.1.1. By Value
 - 11.2.4.3.2. Market Share & Forecast
 - 11.2.4.3.2.1. By Type
 - 11.2.4.3.2.2. By Product
 - 11.2.4.3.2.3. By Application

12. ASIA PACIFIC ENERGY RETROFIT SYSTEMS MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Size & Forecast
 - 12.2.1. By Type
 - 12.2.2. By Product
 - 12.2.3. By Application
 - 12.2.4. By Country
 - 12.2.4.1. China Energy Retrofit Systems Market Outlook
 - 12.2.4.1.1. Market Size & Forecast
 - 12.2.4.1.1.1. By Value
 - 12.2.4.1.2. Market Share & Forecast

- 12.2.4.1.2.1. By Type
- 12.2.4.1.2.2. By Product
- 12.2.4.1.2.3. By Application
- 12.2.4.2. India Energy Retrofit Systems Market Outlook
 - 12.2.4.2.1. Market Size & Forecast
 - 12.2.4.2.1.1. By Value
 - 12.2.4.2.2. Market Share & Forecast
 - 12.2.4.2.2.1. By Type
 - 12.2.4.2.2.2. By Product
 - 12.2.4.2.2.3. By Application
- 12.2.4.3. Japan Energy Retrofit Systems Market Outlook
 - 12.2.4.3.1. Market Size & Forecast
 - 12.2.4.3.1.1. By Value
 - 12.2.4.3.2. Market Share & Forecast
 - 12.2.4.3.2.1. By Type
 - 12.2.4.3.2.2. By Product
 - 12.2.4.3.2.3. By Application
- 12.2.4.4. South Korea Energy Retrofit Systems Market Outlook
 - 12.2.4.4.1. Market Size & Forecast
 - 12.2.4.4.1.1. By Value
 - 12.2.4.4.2. Market Share & Forecast
 - 12.2.4.4.2.1. By Type
 - 12.2.4.4.2.2. By Product
 - 12.2.4.4.2.3. By Application
- 12.2.4.5. Australia Energy Retrofit Systems Market Outlook
 - 12.2.4.5.1. Market Size & Forecast
 - 12.2.4.5.1.1. By Value
 - 12.2.4.5.2. Market Share & Forecast
 - 12.2.4.5.2.1. By Type
 - 12.2.4.5.2.2. By Product
 - 12.2.4.5.2.3. By Application

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

15.1. Daikin Industries, Ltd.

- 15.1.1. Business Overview
- 15.1.2. Key Revenue and Financials
- 15.1.3. Recent Developments
- 15.1.4. Key Personnel
- 15.1.5. Key Product/Services Offered

15.2. Ameresco, Inc.

- 15.2.1. Business Overview
- 15.2.2. Key Revenue and Financials
- 15.2.3. Recent Developments
- 15.2.4. Key Personnel
- 15.2.5. Key Product/Services Offered

15.3. Eaton Corporation PLC

- 15.3.1. Business Overview
- 15.3.2. Key Revenue and Financials
- 15.3.3. Recent Developments
- 15.3.4. Key Personnel
- 15.3.5. Key Product/Services Offered

15.4. AECOM Technical Services, Inc.

- 15.4.1. Business Overview
- 15.4.2. Key Revenue and Financials
- 15.4.3. Recent Developments
- 15.4.4. Key Personnel
- 15.4.5. Key Product/Services Offered

15.5. Johnson Controls International PLC

- 15.5.1. Business Overview
- 15.5.2. Key Revenue and Financials
- 15.5.3. Recent Developments
- 15.5.4. Key Personnel
- 15.5.5. Key Product/Services Offered

15.6. Siemens AG

- 15.6.1. Business Overview
- 15.6.2. Key Revenue and Financials
- 15.6.3. Recent Developments
- 15.6.4. Key Personnel
- 15.6.5. Key Product/Services Offered

- 15.7. Schneider Electric SE
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel
 - 15.7.5. Key Product/Services Offered
- 15.8. Orion Energy Systems, Inc.
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel
 - 15.8.5. Key Product/Services Offered
- 15.9. Trane Technologies plc
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel
 - 15.9.5. Key Product/Services Offered
- 15.10. Signify N.V.
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel
 - 15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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