

# **Residential Heat Pumps Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Air Source, Water Source, Geothermal (Ground) Source), By Capacity (Up To 10 kW, 10 To 20 kW), By Region, Competition, 2018-2028**

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## **Abstracts**

Global Residential Heat Pumps Market has valued at USD 48.26 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.0% through 2028, Favorable government policies for energy-efficient solutions and lowering carbon footprint are anticipated to boost market growth over the forecast period. According to the U.S. Department of Energy, a 30% tax credit can be claimed for buying a property in the U.S. that has qualified Residential Heat Pumps installed in connection with an existing or new dwelling unit. Italy's Conto Termico incentive scheme provides grants that cover 30-35% of costs of installing renewable heating systems in buildings. Australia also provides national grants to municipalities for heat pump installation. Moreover, heat pump industry is significantly affected by the availability of raw materials, such as metals like iron & steel, adhesives, rubber, chemicals, and plastics. Thus, fluctuations in raw material prices have a direct impact on manufacturing costs, which can limit market growth to some extent.

The temperature of soil in most areas of the U.S. is warmer than air during winters and cooler in summers. Ground source Residential Heat Pumps use the ground's constant temperature to cool and heat buildings. According to the Environmental Protection Agency (EPA), GHPs are the most cost-effective, environmentally clean, and energy-efficient systems for cooling and heating buildings, including homes, offices, schools, and hospitals, owing to which demand for Residential Heat Pumps is expected to increase in the U.S. over the forecast period.

The U.S. government has provided personal tax credits and direct incentives on product installation, which encourage the installation of heat pumps. Improving energy efficiency across various industries is one of the major objectives of governments across the world. The rising need for renewable energy sources, along with extensive government support in the form of subsidies, incentives, and other monetary benefits, is projected to fuel market growth over the forecast period. Air Source technology is expected to dominate the market in the U.S. over the forecast period due to rising awareness about adverse effects of greenhouse gas emissions. Furthermore, increasing population along with increasing need for eco-friendly air conditioning in housing sector is expected to drive demand for air-source technology in the U.S.

### Key Market Drivers

As per the International Energy Agency, Residential Heat Pumps continue to cover only a small portion of domestic heat demand, while fossil fuel-based solutions accounted for roughly half of the global heating equipment sales in 2022, with majority of Residential Heat Pumps being installed in new buildings. However, various factors including regulatory development, enhanced construction requirements favoring Residential Heat Pumps in new buildings, and rising air conditioning demand are likely to boost the adoption of heat pump technologies in the coming years.

The global heat pump industry is extremely competitive, relying on technological developments and product improvements. Market players strive to attain application development to gain a competitive advantage. Furthermore, local manufacturers in Asia Pacific pose a considerable threat to the large players, in terms of product quality and price offered to customers, owing to the availability of a highly skilled workforce at low cost and low raw material cost.

### Global Heat Pump Industry Growing

Residential Heat Pumps are strategically placed to benefit from the drive to environmental sustainability. Furthermore, the European Union's strategy of sector integration suggests that 65% of all commercial buildings will be heated by electricity in 2030. The data indicate that heat pump sales are only expected to grow with buildings depending on them for heating and cooling.

Furthermore, The growing demand for energy-efficient devices has been driving the deployment of technology, such as heat pumps, to provide end users with significant potential to contribute to renewable energy and climate targets across various regions

worldwide.

Moreover, The growing need to curb dependence on fossil fuels and look for an energy-efficient alternative to furnaces and air conditioners is expected to boost the demand for Residential Heat Pumps over the forecast period. As Residential Heat Pumps transfer heat rather than generate heat, they can offer equivalent space conditioning at as little as one-quarter of the operating costs of conventional heating or cooling appliances.

Heating a few areas of the facility may save money on material costs for the air handler unit (AHU). However, these factors may affect the overall installation costs if Residential Heat Pumps are installed as the main heating and cooling system. While it is realistic to expect slow growth or even a decline in heat pump sales owing to the COVID-19 pandemic, government policies and consumer demand are expected to drive the sales of heat pumps.

#### Regulations Implemented in Different Regions Aimed At Promoting Nearly Zero Energy

The regulations implemented in different regions aimed at promoting nearly zero energy buildings are directing residential buildings to improve energy performance through efficient energy sources, such as heat pumps. Residential Heat Pumps are often used as heat sources in single-family and terraced houses. Residential Heat Pumps are also increasingly used in apartment buildings.

Further, the 2022 Building Energy Efficiency Standards (Energy Code) adopted by the California Energy Commission (CEC), which goes into effect January 1, 2023, introduced some new requirements for buildings in California, United States. According to the 2022 Energy Code, new single-family homes must have electric Residential Heat Pumps for water and air. Electric Residential Heat Pumps for space heating are also needed in all new multi-family residences.

Vendors are also focusing on residential decarbonizing to decrease CO<sub>2</sub> emissions. For instance, in recent years, Daikin announced a four-step plan to transform residential heating and cooling. According to the company, the European building stock is responsible for approximately 36 % of all CO<sub>2</sub> emissions in the European Union. Therefore, Residential Heat Pumps are being deployed in new residential constructions, thus, driving the need for Residential Heat Pumps in the region.

Residential construction has seen a considerable boost in many markets despite the impact of COVID-19, which also supports market growth. For instance, the German

construction sector was expected to bring in sales of EUR 151 billion in 2022, up 5.5% from 2021, according to figures from the country's two leading construction associations, ZDB and HDB. The growth projection was anticipated to be led by the strong performance of the country's residential construction sector, which has remained resilient throughout the pandemic.

Further, in April 2022, Daikin announced its support for the REPowerEU, which has set a goal to boost the rollout of Residential Heat Pumps from 10 million units in 2027 to 30 million units in 2030. This is further associated with residential decarbonization as the movement can help the European Union achieve the residential sector's decarbonization goals by 2050.

## Key Market Challenges

### High Initial Costs

The upfront cost of purchasing and installing heat pump systems can be higher compared to traditional heating and cooling systems, which may deter some potential customers. Despite efforts to promote energy-efficient technologies, there may still be a lack of awareness among consumers regarding the benefits of Residential Heat Pumps and how they work.

**Intermittent Energy Sources:** The performance of air-source Residential Heat Pumps can be affected by external factors such as extreme temperatures, which may limit their efficiency in certain climates.

**Infrastructure Challenges:** In some regions, the lack of infrastructure for distributing heat from centralized heat pump systems may pose a challenge to widespread adoption.

**Compatibility Issues:** Integrating Residential Heat Pumps into existing heating and cooling systems or retrofitting older buildings can sometimes be challenging and may require additional investments.

### Concerns About Refrigerants

The choice of refrigerants in Residential Heat Pumps is crucial, and there is an ongoing effort to phase out the use of certain refrigerants with high global warming potential (GWP) due to environmental concerns.

It's essential to note that the market conditions and challenges may have evolved since my last update, so I recommend checking more recent sources for the latest information on the global Residential Heat Pumps market.

## Key Market Trends

### Increased policy support and incentives for Residential Heat Pumps

Increased policy support and incentives for Residential Heat Pumps in light of high natural gas prices and efforts to reduce greenhouse gas emissions were key drivers behind the strong uptake. In Europe, Residential Heat Pumps enjoyed a record year, with sales growing by nearly 40%. In particular, sales of air-to-water models, which are compatible with typical radiators and underfloor heating systems, jumped by almost 50% in Europe. In the United States, heat pump purchases exceeded those of gas furnaces. However, in China, the world's largest heat pump market, sales remained stable amidst a general slowdown of the economy. Globally, heat pumps, when used as a main heating device, cover around 10% of heating needs in buildings today. This corresponds to over 100 million households, meaning that one in ten homes that require substantial heating are served by Residential Heat Pumps today. However, many more households use Residential Heat Pumps only part of the winter or as a supplementary source of heating in regions where they are mainly used for cooling buildings.

To align with all existing national energy and climate pledges worldwide, Residential Heat Pumps will have to meet nearly 20% of global heating needs in buildings by 2030. The world is almost on track to reach this milestone if new installations continue to grow at a similar rate globally as they did the last two years. However, sales need to expand by well over 15% per year this decade if the world is to achieve net zero emissions by 2050. Installations of Residential Heat Pumps remain concentrated in new buildings and existing single-family homes. Multistorey apartment buildings and commercial spaces will need to be a priority area if solid growth is to continue. Energy efficiency retrofits also need to accelerate to ensure that new Residential Heat Pumps installed in existing buildings are as efficient as possible and not oversized. This will lower upfront and operating costs for consumers and reduce strains on power systems, especially if combined with smart controls for flexible operation.

## Segmental Insights

## Capacity Insights

The heat pump segment with up to 10-20 kW capacity accounted for a market share of 21.3% in 2023. The growth is attributed to capacity type being suitable for a wide range of uses such as in hotels, swimming pools, factories, restaurants, and schools. The majority of heat pumps in this capacity provide quiet operation, are environment-friendly, offer high efficiency, and have a wide range of hydraulic options and communication protocols. ThermoWise, a heat pump with a 10-20 kW capacity introduced its new product DKRS-200SN4-M2. This particular product is capable of maintaining its temperature at a high 65 degrees Celsius and it widely caters to schools, prisons, and hotels, among others where higher demand for hot water is required.

## Regional Insights

China is one of the significant markets for heat pumps, owing to the government's policies to support more energy-efficient infrastructure in the country, thereby augmenting the market growth. China's vast geographic area is officially divided into five primary climate zones with different thermal design requirements. Heating solutions for these regions can be tailor-made to meet the huge market opportunities.

In Japan, Residential Heat Pumps are well-known products in private and commercial settings. Various types of industries have also embraced them. This development began several decades ago and has been further pushed by energy conservation measures. These were formulated by the Agency for Natural Resources and Energy, stipulating energy conservation of 50.3 million m<sup>3</sup> crude oil equivalent between 2013 and 2030. Such instances are likely to boost the demand for Residential Heat Pumps in the country.

Applications of Residential Heat Pumps in hotels, malls, theatres, etc., are gradually gaining traction in India. Moreover, a tremendous amount of solar energy is available in the country. According to the Ministry of New and Renewable Energy, solar power installed capacity reached around 61.97 GW as of 30th November 2022. The country stood 4th in solar PV deployment across the globe in the previous year. The system combination of solar thermal collectors and Residential Heat Pumps can be an attractive option for increasing renewable energy usage worldwide for heating and domestic hot water preparation.

In South Korea, government initiatives concerning energy-efficient solutions are driving the market growth. For instance, a study carried out by Korea's Ministry of the Environment on the Hyundai Kona Electric, and Kia Niro EV found that the heat pump significantly reduced battery consumption in cold conditions.



In Australia, the Green Building Council of Australia (GBCA) launched the Green Star certification in 2003. Additionally, the Australian Government is focused on a 26-28% reduction in greenhouse gas emissions from 2005 levels by 2030. Such instances demonstrate a significant market growth opportunity over the forecast period.

The countries considered under the rest of Asia-Pacific include Indonesia, Singapore, and Thailand. Indonesia is one of the leading geothermal energy powers in the world and has set ambitions to grow the sector further as the country embraces renewable energy sources. For instance, During the 8th Indonesia International Geothermal Convention & Exhibition (IIGCE) 2022, the Indonesian government announced that, through the General Plan for the Provision of Electricity, it had set a geothermal development target of 3.3 GW installed capacity by 2030. Such initiatives are likely to create a positive outlook for the studied market.

### Key Market Players

Alpex Pumps

Aqua Group

Bright Limited

C.R.I. Pumps Private Limited

Crompton

LORENTZ

Dankoff

Duke Plasto Technique Private Limited

EcoSoach

Ecozen Solutions

Report Scope:

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

Global Residential Heat Pumps Market, By Type:

Air Source

Water Source

Geothermal (Ground) Source

Global Residential Heat Pumps Market, By Capacity:

Up To 10 kW

10 To 20 kW

Global Residential Heat Pumps Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia



Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Residential Heat Pumps Market .

Available Customizations:

Global Residential Heat Pumps 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).

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