

# **South & Central America Room AC Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Split AC, Window AC, and Portable AC), Technology (Inverter Technology and Non-Inverter Technology), and End User (Residential and Commercial)**

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## **Abstracts**

The South and Central America room air conditioning (AC) market is projected to grow significantly, reaching an estimated US\$ 3,201.49 million by 2031, up from US\$ 2,378.35 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.4% from 2025 to 2031, indicating a robust demand for cooling solutions in the region.

### **Executive Summary and Market Analysis**

In April 2025, Brazil's Ministry of Mines and Energy introduced a groundbreaking policy reform aimed at transforming the air conditioning landscape in the country and influencing the broader South and Central American market. This reform includes the implementation of Minimum Energy Performance Standards (MEPS) based on the Cooling Seasonal Performance Factor (CSPF), a metric that accurately measures the energy efficiency of inverter-based room air conditioners. This marks a significant shift towards sustainability, as the new regulations will phase out most fixed-speed air conditioning units by 2026. The adoption of higher-efficiency systems, particularly those utilizing inverter technology, is expected to reduce carbon emissions by approximately 72 million metric tons and generate around US\$ 6.2 billion in energy savings by 2040.

Brazil, being the largest market in the region, plays a crucial role in shaping the room air conditioner market dynamics. As the region faces increasing electricity demand, rising temperatures, and a growing middle-class population, the transition to energy-efficient room air conditioning solutions is both a necessity and an opportunity. Inverter room air conditioners are particularly advantageous due to their energy-saving capabilities, improved thermal comfort, and long-term cost-effectiveness, aligning with regional goals for enhanced energy security and climate targets.

## Strategic Insights

The South and Central America room AC market can be segmented by product type, technology, and end users. In terms of product type, the market is divided into split ACs, window ACs, and portable ACs, with split ACs holding the largest market share in 2024. By technology, the market is bifurcated into inverter and non-inverter technologies, with inverter technology dominating the market. Additionally, the end-user segmentation includes residential and commercial sectors, where the residential segment accounted for a larger share in 2024.

One of the most significant trends influencing the global room air conditioner market is the rapid advancement in technology, particularly regarding energy efficiency, smart functionality, and sustainable design. Traditional air conditioning systems have evolved into sophisticated appliances, with manufacturers focusing on innovations that meet consumer expectations and comply with regulatory standards. Inverter-based systems have revolutionized the market by providing precise temperature control, quieter operation, and lower energy consumption compared to conventional fixed-speed units.

In response to the growing demand for energy-efficient and technologically advanced cooling solutions, GE Appliances, a subsidiary of Haier, is expanding its portfolio of room air conditioners under the GE Profile and GE brands. This strategic move aligns with the industry's trend towards innovation-driven growth, as consumers increasingly prioritize cooling performance alongside smart functionality, energy efficiency, and user-friendly design. GE's new product range reflects the market's shift towards inverter technology and IoT-enabled features, catering to modern household preferences. By integrating intelligent temperature control, seamless connectivity, and sleek aesthetics, GE's offerings represent the next generation of room air conditioning products designed for enhanced convenience and sustainability.

The integration of smart controls and Internet of Things (IoT) capabilities into room air conditioning systems is creating new market opportunities. Modern air conditioners are

increasingly equipped with Wi-Fi connectivity, mobile app integration, and compatibility with voice assistants like Amazon Alexa and Google Assistant. These features allow users to control their indoor climate, monitor energy consumption, and set automated schedules based on occupancy or outdoor weather conditions. For consumers, this translates to enhanced convenience and cost savings, while for manufacturers, it opens up new business models centered around data-driven services, predictive maintenance, and customer engagement.

## Country Insights

The South and Central America room AC market is primarily composed of Brazil, Argentina, and other countries in the region, with Brazil holding the largest market share in 2024. On September 4, 2024, Hitachi Energy announced a significant investment of over US\$ 200 million to expand its operations in Brazil, part of a broader US\$ 1.5 billion global initiative to enhance transformer manufacturing capacity. This investment underscores Hitachi Energy's commitment to Brazil and supports the country's increasing demand for advanced energy and climate infrastructure. As Brazil experiences urbanization and a heightened focus on energy efficiency, particularly in residential and commercial sectors, the room air conditioner market is poised for substantial growth.

## Company Profiles

Key players in the South and Central America room AC market include Blue Star Ltd, Carrier Global Corp, Daikin Industries Ltd, Johnson Controls - Hitachi Air Conditioning Company, LG Electronics Inc, Mitsubishi Electric Corp, Panasonic Holdings Corp, Samsung Electronics Co Ltd, Voltas Ltd, and Whirlpool Corp. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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