

Personal Cooling Device Market Size, Share & Growth Report, H2-2026: Industry Outlook By Product Type, By Technology, By Power Source, By Price Point, By Application, By Distribution Channel, Companies and Countries to 2032

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Abstracts

The global Personal Cooling Device Market size is forecast to grow at a CAGR of 4.9% between 2026 and 2032. This Personal Cooling Device report provides a comprehensive analysis across By Product Type (Wearable Cooling Devices, Personal Air Conditioners and Desk Fans, Handheld, Thermoelectric Personal Coolers, Cooling Apparel and Textiles), By Technology (Evaporative Cooling, Thermoelectric, Phase-Change Material, Air-Circulation, Hybrid), By Power Source (Battery-Powered, Rechargeable, Plug-In Electric, Solar-Powered and Hybrid), By Price Point (Low-End, Mid-Range, High-End), By Application (Residential, Outdoor Recreation and Travel, Industrial and Construction Workers, Sports, Fitness and Athletics, Healthcare, Medical and Elderly Care, Military and Defense), By Distribution Channel (Offline Outlets, Online Retail), across 5 geographic regions, and 22 countries.

Heat-Stress Management, Wearable Comfort, and Outdoor Mobility Drive Personal Cooling Adoption

Personal cooling devices include wearable neck coolers, portable fans, cooling vests, thermoelectric accessories, evaporative products, and sensor-enabled systems designed to regulate perceived body temperature in hot environments. Demand is strengthening as extreme heat, urban commuting, outdoor recreation, industrial work, and heat-sensitive health conditions increase the need for localized cooling without conditioning an entire space. Consumers prioritize lightweight construction, quiet operation, battery endurance, hands-free use, and discreet integration with clothing.

Commercial adoption is also expanding across warehouses, construction sites, healthcare, hospitality, sports, and field services, where worker comfort can influence safety and productivity. Rechargeable power systems, compact thermoelectric modules, and mobile connectivity are shifting the category from simple airflow products toward personalized thermal-management platforms suited to both consumer and occupational applications.

Thermoelectric Performance, Extended Battery Life, and Global Rollouts Strengthen Manufacturer Strategies

Manufacturers are improving cooling area, heat-transfer efficiency, runtime, usability, and international distribution to address both personal and enterprise requirements. Sony Thermo Technology introduced REON POCKET PRO as a higher-performance wearable thermal device with greater cooling coverage, stronger heat absorption, longer operating time, and direct button control that reduces dependence on a smartphone application. The company positioned the model for commuters, warehouses, and hotter international markets while preparing availability across 22 countries and regions. Broader industry development is concentrating on semiconductor cooling modules, ergonomic neck-mounted architectures, quieter miniature fans, washable cooling textiles, and swappable or fast-charging batteries. Manufacturers are also using digital thermal sensors, automated performance adjustment, and enterprise procurement channels to move beyond seasonal gadget sales into structured workplace heat-mitigation programs.

Sensor-Based Thermal Personalization, Corporate Heat Protection, and Battery Optimization Reshape Product Portfolios

Manufacturer activity indicates a transition toward intelligent cooling systems that automatically adapt output to ambient temperature, humidity, movement, and user preference. Product engineering is increasingly focused on larger contact surfaces, improved thermal dissipation, longer operating cycles, and controls that remain practical in industrial environments where workers cannot continuously access mobile applications. REON POCKET development illustrates this shift, with stronger emphasis on corporate deployment, diverse body sizes, regional climate conditions, and global quality standards rather than a single commuter use case. Companies are also expanding wearable fans, cooling apparel, and modular accessories across outdoor sports, logistics, healthcare, and public transportation. Battery efficiency, low-noise operation, repairability, recyclable components, and occupational heat-safety integration are becoming more important differentiators as personal cooling evolves into a broader

thermal-comfort ecosystem.

Shifting Consumer Expectations and Industry Transformation

Young and adult consumers across markets are increasingly scrutinizing products beyond price and brand, seeking greater visibility into ingredients or materials, their origin, manufacturing location, quality, sourcing practices, and environmental attributes. This is increasing the importance of ingredient lists, nutrition labeling, allergen declarations, certifications, sourcing information and other product claims, while also raising the bar for transparency and substantiation.

In addition, the industry is being reshaped by advances in AI, ingredient and formulation technologies, automation, digital commerce, packaging technology and data analytics, creating new opportunities to accelerate product development, improve product quality and optimize operations. However, these capabilities require higher capital commitments, particularly as companies invest in store expansion and refurbishment, automation, AI-enabled systems, digital infrastructure and other productivity-enhancing technologies.

Competitive dynamics are also shifting as private-label and disruptor brands raise value expectations across selected price points, pushing established players to sharpen their entry, core and premium propositions. Private-label expansion, adjacent-category opportunities, M&A and AI are consequently creating new avenues for growth for manufacturers, suppliers and other industry participants across both developed and developing markets.

Impact of Tariffs and Inflation Rates on Personal Cooling Device Markets and Companies

Tariffs and elevated inflation are directly reshaping the cost structure and pricing strategies of Food & Beverages and Consumer Goods companies. The impact is particularly visible in imported ingredients and raw materials, packaging materials, energy, transportation, and other internationally sourced inputs, while higher consumer prices are increasing pressure on household purchasing decisions. The IMF WEO Data 2026 projects global headline inflation at 4.7% in 2026, while the continued use of tariffs and other trade measures is increasing uncertainty around sourcing and cross-border costs.

The report quantifies the impact of tariff changes and inflation on the market by

analyzing country-level inflation trends, tariff exposure, import dependence, input-cost movements and pricing conditions, and assesses their implications for market volumes, revenues and margins.

Key Value-Creating Activities and Participants Across the Personal Cooling Device Industry Value Chain

Personal Cooling Device value chains are becoming more cost-sensitive and closely integrated, with changes in input prices, sourcing concentration, production efficiency, packaging costs, logistics and channel economics directly influencing margins and competitive positioning at each stage.

The report maps the value chain from upstream suppliers to end-use channels, identifies the principal participants and value-adding activities at each stage, and assesses the relative importance of procurement, manufacturing, packaging, logistics, distribution and retail in the forecast period.

Personal Cooling Device Pricing analysis- How Input Costs, Competition and Positioning Influence Personal Cooling Device Market Pricing

Pricing analysis in the report establishes how prices differ across products, segments, countries and channels and what is driving those differences. The report provides historical and current price benchmarks, country-level and regional comparisons, product-level pricing, and an assessment of the principal factors influencing price movements.

Five forces analysis- How Competitive Forces Are Shaping the Personal Cooling Device Industry

The chapter in the Personal Cooling Device report evaluates competitive rivalry, threat of new entrants, bargaining power of suppliers, bargaining power of buyers, and threat of substitutes, with each force assessed against the market's actual operating conditions. It analyzes market factors including fragmentation, product differentiation, manufacturing and distribution requirements, switching costs, supplier concentration, raw-material availability, retailer purchasing power, and the ability of consumers to substitute between brands. The report also examines how e-commerce and marketplaces are lowering certain barriers to market access while intensifying price transparency, and how established distribution networks, brand recognition, scale and customer relationships continue to protect incumbents across categories.

Critical Success Factors- Key Factors Determining Competitive Success in the Personal Cooling Device Industry

The report identifies the critical success factors that fuel growth in the Personal Cooling Device market, in addition to market trends and company capabilities. The Personal Cooling Device report evaluates critical success factors against the market's competitive environment and assesses how leading participants are strengthening them. Further, the chapter identifies the factors with strongest influence on market-share retention, customer loyalty, pricing power, operating performance, and long-term competitive differentiation.

Segmentation analysis- How Demand Is Distributed Across Key Segments of the Personal Cooling Device Market

The report analyzes the global and regional markets across key types, applications, and other segments from 2021 to 2025. Further, forecasts are provided from 2026 to 2032. Key segments included in the study are By Product Type (Wearable Cooling Devices, Personal Air Conditioners and Desk Fans, Handheld, Thermoelectric Personal Coolers, Cooling Apparel and Textiles), By Technology (Evaporative Cooling, Thermoelectric, Phase-Change Material, Air-Circulation, Hybrid), By Power Source (Battery-Powered, Rechargeable, Plug-In Electric, Solar-Powered and Hybrid), By Price Point (Low-End, Mid-Range, High-End), By Application (Residential, Outdoor Recreation and Travel, Industrial and Construction Workers, Sports, Fitness and Athletics, Healthcare, Medical and Elderly Care, Military and Defense), By Distribution Channel (Offline Outlets, Online Retail).

US Personal Cooling Device Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Personal Cooling Device companies are focusing on value positioning, distribution strength, product differentiation, and operating efficiency as private-label products gain ground against national brands. The US store-brand sales reached \$282.8 billion in 2025, growing 3.3% versus 1.2% for national brands, while store brands reached a record 21.3% dollar share and 23.5% unit share according to the Private Label Manufacturers Association. The report provides the US Personal Cooling Device market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Personal Cooling Device Market - Affordability, Retail Concentration and Supply-Chain Resilience Shape Market Growth

Over the past two years, Canadian companies have been focusing on value, supply-chain resilience and manufacturing efficiency to overcome trade and cost pressures. Retail demand also remained firm, with food and beverage retail sales increasing 4.4% year-on-year in December 2025, led by packaged dry foods, fresh meat and poultry, and snacks, according to Statistics Canada. The report identifies competitive pricing and product value, retailer access, diversified sourcing, productivity, brand positioning, and portfolio innovation as key success factors across the Canadian Personal Cooling Device value chain.

Mexico Personal Cooling Device Market- Rising Consumption, Manufacturing Expansion and Export Integration Drive Market Development

Mexico's Personal Cooling Device market is supported by a large domestic consumer base, established manufacturing capabilities, and strong export integration, while pricing remains an important consideration for consumers and manufacturers. The INEGI reported that the consumer prices for food, beverages and tobacco increased 5.13% year-on-year in May 2026, compared with 3.94% for overall consumer prices, keeping affordability and price management central to category performance. Leading companies are focusing on domestic manufacturing scale, ingredient availability, export competitiveness, product differentiation, efficient sourcing and supply-chain execution to gain profit margins.

Germany Personal Cooling Device Market- Private-Label Strength, Price Sensitivity and Manufacturing Efficiency Shape Competition

Value-for-money, private-label competitiveness, efficient sourcing, and cost control are central to market performance and continue to shape the market outlook. German food prices remained structurally above their pre-inflation baseline: the food and non-alcoholic beverages CPI reached 136.2 in 2025 (2020=100), compared with 121.9 for the overall CPI, although annual food inflation moderated to 2.0% in 2025. The market is also being influenced by Germany's policy push toward healthier eating and greater development of alternative protein products, creating additional opportunities for reformulation and product innovation.

France Personal Cooling Device Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Personal Cooling Device market is being shaped by moderating food inflation, cautious household consumption and a shift in retail demand toward value and specialized formats. Household final consumption expenditure increased only 0.4% in volume in 2025, while household purchasing power declined 0.4%, keeping affordability and price-value positioning important despite the easing of inflation. Personal Cooling Device companies operating in France are balancing value-oriented pricing with quality and differentiation, strengthening supermarket and alternative-format distribution, managing procurement and supply-chain costs, and responding to increasingly selective household spending.

UK Personal Cooling Device Market- Import Dependence, Retail Concentration and Product Portfolio Expansion Influence Market Growth

The UK Personal Cooling Device market is strongly influenced by import dependence, household affordability, and retail concentration. Consumer expenditure on food and alcoholic drinks reached ?303.3 billion in real terms in 2025, up 1.1%, with spending on food and drink eaten outside the home increasing 2.3% to ?137.7 billion, while household food expenditure was broadly flat. The structure of the industry also favors companies able to operate efficiently at scale: approximately 98.8% of UK food and drink manufacturing businesses are SMEs, creating a large and fragmented supplier base alongside major manufacturers and retailers. Over the forecast period, competitive pricing, procurement efficiency, product differentiation, retailer and foodservice relationships, import management and the ability to respond remain key success factors.

Spain Personal Cooling Device Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Personal Cooling Device market is supported by strong household food expenditure, a large tourism-driven consumption base and a highly export-oriented food industry, although consumers remain sensitive to price increases. Tourism provides an additional demand channel: international tourists spent €11.7 billion in Spain in April 2026 alone, up 7.4% year-on-year, including €1.99 billion on food and drinks, up 6.8%. Spain's food industry also reached a record level of exports in 2025, reinforcing its importance as an export manufacturing base and exposing producers to international trade conditions and supply-chain developments.

Italy Personal Cooling Device Market- Product Quality, Heritage and Export

Competitiveness Remain Key Market Drivers

Italy's consumption structure favors companies capable of maintaining value across differentiated price points: household consumption expenditure averaged €2,738 per month in 2023, up 4.3% from 2022, although the increase reflected both higher spending and price effects. Italy's large manufacturing and export base supports demand for products with strong quality, provenance, and differentiation, particularly where Italian origin provides a competitive advantage. Companies that can combine Italy's established food-manufacturing capabilities with tighter cost control and differentiated products are better positioned to navigate slower domestic consumption and renewed price pressure.

China Personal Cooling Device Market- Digital Commerce, Brand Trust and Selective Consumer Spending Reshape Demand

China's Personal Cooling Device markets are being shaped by large-scale domestic consumption, rapid online retail expansion, increasingly selective spending and a widening performance gap between categories. Total retail sales of consumer goods reached RMB 50.1 trillion in 2025, up 3.7%, significantly outperforming beverages at 1.0%. Online retail is particularly important: physical-goods online sales reached RMB 13.1 trillion, representing 26.1% of total consumer-goods retail sales, while online sales of food increased 14.5% according to the National Bureau of Statistics of China. Established brands retain an advantage where consumers prioritize familiarity and brand authority, while the rapid expansion of online food sales creates opportunities for digitally native brands and manufacturers capable of using data, AI, and platform ecosystems.

India Personal Cooling Device Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Personal Cooling Device market is being supported by rising household consumption, a large and increasingly diversified consumer base, expansion of food processing and continued investment in formal food manufacturing. India's rural monthly per-capita consumption expenditure reached ₹4,122 in 2023–24, up from ₹3,773 in 2022–23, while urban MPCE increased to ₹6,996, highlighting the continued expansion of household purchasing capacity across both rural and urban markets. The supply side is also becoming more organized and processing-intensive. Digital commerce and AI-enabled consumer engagement are also becoming increasingly relevant, particularly as Indian consumers adopt digital tools across product discovery and purchasing.

Japan Personal Cooling Device Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Personal Cooling Device markets are being shaped by high food expenditure, renewed price pressure and increasingly cautious real household consumption, alongside a structurally mature consumer base. Price pressure has also remained visible in 2026, with Japan's headline CPI increasing 1.5% year-on-year in May 2026, while core inflation excluding fresh food increased 1.4%. Meanwhile, online purchasing remains an important route to consumers: 55.3% of two-or-more-person households used online shopping in May 2026, with food contributing materially to the increase in online-shopping expenditure. Companies also need to manage smaller household sizes and differing consumption patterns by age, while maintaining strong product differentiation in a mature market where incremental volume growth is more difficult to achieve.

Brazil Personal Cooling Device Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Personal Cooling Device market is supported by a large domestic consumption base, a highly integrated agricultural and food-processing sector, and exceptional export competitiveness, while renewed food-price pressure is keeping affordability important. The country's food and beverage industry generated R\$1.388 trillion in revenue in 2025, equivalent to 10.9% of national GDP, with domestic sales reaching R\$1.02 trillion; retail accounted for R\$732 billion and foodservice R\$287.9 billion. Real industry sales increased 2.2%, while companies invested R\$41.3 billion, up 6.8%, including R\$26.7 billion in innovation, plant modernization and new technologies.

Middle East Africa Personal Cooling Device Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Personal Cooling Device markets are being shaped by high dependence on food imports, food-security investment, urbanization, tourism, premium retail and increasingly selective consumer spending, with conditions differing substantially between Gulf markets and the wider region. The GCC recorded overall inflation of only 1.8% in 2025, while food and beverage prices increased 1.2%, indicating relatively contained consumer-price pressure compared with many global markets. Across the region, this combination of import exposure and localization is increasing the importance of supplier diversification, local production, inventory

management, and efficient logistics, while strong tourism, hospitality, and modern retail ecosystems are supporting demand for differentiated, convenience-oriented, and premium products.

Personal Cooling Device Competitive Landscape

The Personal Cooling Device competitive landscape is becoming more fragmented as established multinational brands compete simultaneously with private-label products, regional manufacturers, digitally native brands and category-focused disruptors. Competitive advantage is increasingly determined by the ability to balance price, product quality, innovation, distribution reach and speed of response rather than by brand scale alone. The report provides detailed analysis of leading companies including business profile, SWOT analysis, products and services, and financial profiles of Honeywell International Inc., Dyson Ltd., LG Electronics Inc., Panasonic Holdings Corp., O2COOL LLC, Havells India Ltd., Sony Group Corp., Xiaomi Corp., Razer Inc., Columbia Sportswear Co..

Personal Cooling Device Market Segmentation

By Product Type

Wearable Cooling Devices

Personal Air Conditioners and Desk Fans

Handheld

Thermoelectric Personal Coolers

Cooling Apparel and Textiles

By Technology

Evaporative Cooling

Thermoelectric

Phase-Change Material

Air-Circulation

Hybrid

By Power Source

Battery-Powered

Rechargeable

Plug-In Electric

Solar-Powered and Hybrid

By Price Point

Low-End

Mid-Range

High-End

By Application

Residential

Outdoor Recreation and Travel

Industrial and Construction Workers

Sports, Fitness and Athletics

Healthcare, Medical and Elderly Care

Military and Defense

By Distribution Channel

Offline Outlets

Online Retail

Geographical Coverage

North America (US, Canada, Mexico)

Europe (Germany, UK, Spain, France, Italy, Russia, Rest of Europe)

Asia Pacific (China, India, Japan, South Korea, Southeast Asia, Rest of APAC)

Latin America (Brazil, Argentina, Rest of South and Central America)

Middle East and Africa (Saudi Arabia, UAE, MENA, South Africa, Sub-Saharan Africa)

Leading Companies in Personal Cooling Device Industry

Honeywell International Inc.

Dyson Ltd.

LG Electronics Inc.

Panasonic Holdings Corp.

O2COOL LLC

Havells India Ltd.

Sony Group Corp.

Xiaomi Corp.

Razer Inc.

Columbia Sportswear Co.

Frequently Asked Questions

1. What is the current size of the Personal Cooling Device market?

The Personal Cooling Device market is estimated at US\$ in 2026, based on the report's market sizing methodology. Demand is supported by new product launches, while competition from local labels is influencing near-term market performance. The market is expected to reach US\$ by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Personal Cooling Device market expected to grow through the forecast period?

The Personal Cooling Device market is projected to expand at a 4.9% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Personal Cooling Device market?

The report analyzes the report across By Product Type (Wearable Cooling Devices, Personal Air Conditioners and Desk Fans, Handheld, Thermoelectric Personal Coolers, Cooling Apparel and Textiles), By Technology (Evaporative Cooling, Thermoelectric, Phase-Change Material, Air-Circulation, Hybrid), By Power Source (Battery-Powered, Rechargeable, Plug-In Electric, Solar-Powered and Hybrid), By Price Point (Low-End, Mid-Range, High-End), By Application (Residential, Outdoor Recreation and Travel, Industrial and Construction Workers, Sports, Fitness and Athletics, Healthcare, Medical and Elderly Care, Military and Defense), By Distribution Channel (Offline Outlets, Online Retail).

4. Which regions are generating the largest demand for Personal Cooling Device products?

Differences in consumer preferences, pricing, regulation and distribution infrastructure continue to create significant variations in market performance across regions. Asia Pacific is the fastest growing market driven by China, India, Southeast Asia, and other emerging markets.

5. Which companies are leading the Personal Cooling Device market?

The Personal Cooling Device market includes major participants such as Honeywell International Inc., Dyson Ltd., LG Electronics Inc., Panasonic Holdings Corp., O2COOL LLC, Havells India Ltd., Sony Group Corp., Xiaomi Corp., Razer Inc., Columbia Sportswear Co.. Leading companies compete through product portfolio, distribution, technology, while recent competitive activity includes M&A, product launches, capacity expansion, and geographic expansion. Market leadership varies significantly by product category and geography.

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2032
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Personal Cooling Device Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Personal Cooling Device Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010-2030
 - 1.5.2. Population Forecast by Country, 2010-2030
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL PERSONAL COOLING DEVICE MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Personal Cooling Device Markets in 2026
- 3.2. Global Historic and Forecast Personal Cooling Device Market Size Outlook, USD Million, 2021-2032
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2032
- 3.4. Market Dynamics
 - 3.4.1. Key Personal Cooling Device Market Driving Forces and Their Impact on Market

Outlook

3.4.2. Short and Long-Term Trends and Insights Shaping the Future

3.4.3. Potential Personal Cooling Device Market Opportunities for Industry

Stakeholders

3.4.4. Potential Challenges across Personal Cooling Device Value Chain

CHAPTER 4- PERSONAL COOLING DEVICE MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

4.1. Porter's Five Forces Analysis

4.1.1. Bargaining Power of Buyers

4.1.2. Bargaining Power of Suppliers

4.1.3. Threat of Substitutes

4.1.4. Threat of New Entrants

4.1.5. Intensity of Competitive Rivalry

4.1.6. Market Attractiveness Analysis by Segment

4.1.7. Market Attractiveness Analysis by Country

4.2. Competitive Landscape

4.2.1 Product Analysis of Leading Personal Cooling Device Companies

4.2.2 Recent Strategic Developments

4.2.3 Mergers, Acquisitions, and Partnerships

4.2.4 Key Success Factors

4.3. Value Chain Analysis

4.3.1. Key Value Chain Segments

4.3.2. Dominant players by value-chain stage

4.4. SWOT Analysis

4.4.1. Key Strengths and Opportunities

4.4.2. Major Weaknesses and Threats

4.5 Technology Roadmap

CHAPTER 5- PERSONAL COOLING DEVICE MARKET OUTLOOK BY SEGMENTS

5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2032

5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2032

5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2032

By Product Type

Wearable Cooling Devices

Personal Air Conditioners and Desk Fans

Handheld

Thermoelectric Personal Coolers
Cooling Apparel and Textiles
By Technology
Evaporative Cooling
Thermoelectric
Phase-Change Material
Air-Circulation
Hybrid
By Power Source
Battery-Powered
Rechargeable
Plug-In Electric
Solar-Powered and Hybrid
By Price Point
Low-End
Mid-Range
High-End
By Application
Residential
Outdoor Recreation and Travel
Industrial and Construction Workers
Sports, Fitness and Athletics
Healthcare, Medical and Elderly Care
Military and Defense
By Distribution Channel
Offline Outlets
Online Retail

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

- 6.1. Base Case Scenario
 - 6.1.1. Definitions and Insights
 - 6.1.2. Market Size Outlook to 2032
- 6.2. Low Growth Case Scenario
 - 6.2.1. Definitions and Insights
 - 6.2.2. Market Size Outlook to 2032
- 6.3. High Growth Case Scenario
 - 6.3.1. Definitions and Insights
 - 6.3.2. Market Size Outlook to 2032

CHAPTER 7- NORTH AMERICA PERSONAL COOLING DEVICE MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Personal Cooling Device Market Overview
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Personal Cooling Device Market Trends and Growth Opportunities to 2032
- 7.5. North America Personal Cooling Device Market Size Outlook by Type
- 7.6. North America Personal Cooling Device Market Size Outlook by Application
- 7.7. North America Personal Cooling Device Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Personal Cooling Device Market Size Outlook, 2021- 2032
 - 7.8.3. Key Market Drivers and Industry Developments in the US Personal Cooling Device Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Personal Cooling Device Market Size Outlook, 2021- 2032
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Personal Cooling Device Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Personal Cooling Device Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Personal Cooling Device Companies

CHAPTER 8- EUROPE PERSONAL COOLING DEVICE MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Personal Cooling Device Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Personal Cooling Device Market Trends and Growth Opportunities to
- 8.5. Europe Personal Cooling Device Market Size Outlook by Type
- 8.6. Europe Personal Cooling Device Market Size Outlook by Application
- 8.7. Europe Personal Cooling Device Market Size Outlook by Country
- 8.8. Germany

- 8.8.1. Key Statistics
- 8.8.2. Germany Personal Cooling Device Market Size Outlook, 2021- 2032
- 8.8.3. Key Market Drivers and Industry Developments in Germany Personal Cooling Device Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Personal Cooling Device Market Size Outlook, 2021- 2032
 - 8.9.3. Key Market Drivers and Industry Developments in France Personal Cooling Device Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Personal Cooling Device Market Size Outlook, 2021- 2032
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Personal Cooling Device Companies
- 8.11. Spain
 - 8.11.1. Key Statistics
 - 8.11.2. Spain Personal Cooling Device Market Size Outlook, 2021- 2032
 - 8.11.3. Key Market Drivers and Industry Developments in Spain Personal Cooling Device Companies
- 8.12. Italy
 - 8.12.1. Key Statistics
 - 8.12.2. Italy Personal Cooling Device Market Size Outlook, 2021- 2032
 - 8.12.3. Key Market Drivers and Industry Developments in Italy Personal Cooling Device Companies
- 8.13. Rest of Europe
 - 8.13.1. Key Statistics
 - 8.13.2. Rest of Europe Personal Cooling Device Market Size Outlook, 2021- 2032
 - 8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Personal Cooling Device Companies

CHAPTER 9- ASIA PACIFIC PERSONAL COOLING DEVICE MARKET SIZE ANALYSIS AND OUTLOOK

- 9.1. Asia Pacific Personal Cooling Device Market Overview
- 9.2. Leading Companies Operating in Asia Pacific
- 9.3. Key Industry Statistics, 2026
- 9.4. Asia Pacific Personal Cooling Device Market Trends and Growth Opportunities to
- 9.5. Asia Pacific Personal Cooling Device Market Size Outlook by Type
- 9.6. Asia Pacific Personal Cooling Device Market Size Outlook by Application

9.7. Asia Pacific Personal Cooling Device Market Size Outlook by Country

9.8. China

9.8.1. Key Statistics

9.8.2. China Personal Cooling Device Market Size Outlook, 2021- 2032

9.8.3. Key Market Drivers and Industry Developments in China Personal Cooling Device Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Personal Cooling Device Market Size Outlook, 2021- 2032

9.9.3. Key Market Drivers and Industry Developments in Japan Personal Cooling Device Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Personal Cooling Device Market Size Outlook, 2021- 2032

9.10.3. Key Market Drivers and Industry Developments in India Personal Cooling Device Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Personal Cooling Device Market Size Outlook, 2021- 2032

9.11.3. Key Market Drivers and Industry Developments in South Korea Personal Cooling Device Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Personal Cooling Device Market Size Outlook, 2021- 2032

9.12.3. Key Market Drivers and Industry Developments in Australia Personal Cooling Device Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Personal Cooling Device Market Size Outlook, 2021- 2032

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Personal Cooling Device Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA PERSONAL COOLING DEVICE MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Personal Cooling Device Market Overview

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Personal Cooling Device Market Trends and Growth

Opportunities to

10.5. South and Central America Personal Cooling Device Market Size Outlook by Type

10.6. South and Central America Personal Cooling Device Market Size Outlook by Application

10.7. South and Central America Personal Cooling Device Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

10.8.2. Brazil Personal Cooling Device Market Size Outlook, 2021- 2032

10.8.3. Key Market Drivers and Industry Developments in Brazil Personal Cooling Device Companies

10.9. Argentina

10.9.1. Key Statistics

10.9.2. Argentina Personal Cooling Device Market Size Outlook, 2021- 2032

10.9.3. Key Market Drivers and Industry Developments in Argentina Personal Cooling Device Companies

10.10. Rest of Latin America

10.10.1. Key Statistics

10.10.2. Rest of Latin America Personal Cooling Device Market Size Outlook, 2021- 2032

10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Personal Cooling Device Companies

CHAPTER 11- MIDDLE EAST AND AFRICA PERSONAL COOLING DEVICE MARKET SIZE ANALYSIS AND OUTLOOK

11.1. Middle East and Africa Personal Cooling Device Market Overview

11.2. Leading Companies Operating in Middle East and Africa

11.3. Key Industry Statistics, 2026

11.4. Middle East and Africa Personal Cooling Device Market Trends and Growth Opportunities to

11.5. Middle East and Africa Personal Cooling Device Market Size Outlook by Type

11.6. Middle East and Africa Personal Cooling Device Market Size Outlook by Application

11.7. Middle East and Africa Personal Cooling Device Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Personal Cooling Device Market Size Outlook, 2021- 2032

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Personal

Cooling Device Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Personal Cooling Device Market Size Outlook, 2021- 2032

11.9.3. Key Market Drivers and Industry Developments in the UAE Personal Cooling Device Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Personal Cooling Device Market Size Outlook, 2021- 2032

11.10.3. Key Market Drivers and Industry Developments in Africa Personal Cooling Device Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Personal Cooling Device Industry

Honeywell International Inc.

Dyson Ltd.

LG Electronics Inc.

Panasonic Holdings Corp.

O2COOL LLC

Havells India Ltd.

Sony Group Corp.

Xiaomi Corp.

Razer Inc.

Columbia Sportswear Co.

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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