

# HVAC&R MARKET REPORTS official catalogue 2021





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Since 1993, Eurovent Market Intelligence (EMI), the leading statistics office on the European HVAC&R market, has been launching its vast annual data collection campaigns. These collections help to build a dynamic and reliable HVAC&R map for the EMEA market, allowing participating manufacturers to better identify themselves and navigate in a disrupted market thanks to diversified information, like results on market size and evolution, segmentation, forecast, trends, position, concentration ratio... With today more than 300 companies, the number of participants in our statistics collections makes our market data the most reliable and representative on the HVAC market in Europe.

EMI offers also a new online marketing tools: a website, under private access, where the participants can make an infinite number of analyses on the market in a very fast and user-friendly way, in order to understand immediately their position on the market.

Participating in our programmes requires only a modest investment of time to gain far more than an uncertain and costly market research, that is why we invite you to stay visionary and join our programmes in 2021. Your business needs strategy, but strategy needs information.

Yours faithfully,  
the Eurovent Market Intelligence team

# Registration form

**Please tick the chosen fields:**

**Yes**, our company **will participate** in the following Market Intelligence Programmes in January/February 2021 (such participation will imply your full acceptance of the General Conditions and Procedures at the page 12):

Market intelligence programme	Price (VAT excluded)	Frequency	Type of results	Nota	I want to participate in	and thus receive the 2 extra free reports on*
Adiabatic coolers	1 000 €	Annual	Consolidated + reassessed data	<i>Free for participants of cooling towers or heat exchangers</i>	<input type="checkbox"/>	<input type="checkbox"/>
Air curtains	1000 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Air filters	1400 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Air Handling Units	1800 €	Annual + quarterly	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Chilled beams	1400 €	Annual	Consolidated + reassessed data Private analysis		<input type="checkbox"/>	<input type="checkbox"/>
Chillers & hydronic heat pumps	1800 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Cooling towers	1400 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Domestic Heat Pumps	0 €	Annual	Consolidated + reassessed data	<i>New collection</i>	<input type="checkbox"/>	<input type="checkbox"/>
Fan coils units	1800 €	Annual + quarterly	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Heat exchangers	1400 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
IT Cooling	1400 €	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Pool dehumidifiers	1000 €	Annual	Consolidated + reassessed data	<i>Free for participants of AHU or rooftops</i>	<input type="checkbox"/>	<input type="checkbox"/>
Refrigerated Display Cabinets (RDC)	0 €	Annual	Consolidated + reassessed data	<i>New collection</i>	<input type="checkbox"/>	<input type="checkbox"/>
Rooftops	1800 €	Annual + quarterly	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
VRF	1400€	Annual	Consolidated + reassessed data + online dynamic private report		<input type="checkbox"/>	<input type="checkbox"/>
Water Fan Heaters	0 €	Annual	Consolidated + reassessed data	<i>New collection</i>	<input type="checkbox"/>	<input type="checkbox"/>
Quarterly Chillers	400 €	Quarterly	Consolidated data + website	<i>Constant panel</i>	<input type="checkbox"/>	<input type="checkbox"/>

*\*Free market data: every company who participates in at least one annual programme get the right to receive up to 2 market reports (reassessment results) of programmes in which it **does not participate**, and for which it **does not manufacture or sell any product**. A group of companies is considered as only one company.*

Company: \_\_\_\_\_

Stamp / signature: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_

Date: \_\_\_\_\_

**Important information:**

**The market intelligence programmes are free for the new participants.**

**Each market intelligence programme is free for the companies participating in the equivalent Eurovent certification programme (except the Quarterly chillers programme).**

(Please fill in and send it to [statistics@eurovent-marketintelligence.eu](mailto:statistics@eurovent-marketintelligence.eu) by 7 December 2020)

# Air Curtains

Air curtains sales can be challenged by sluggish development of Commercial and Retail due to the covid-19 impact.

# Air Filters

Increasing importance of air quality will drive the renovation of ventilation systems and therefore air filters sales.

## Type of market data

- **Volume sold in unit**
- **Air flow capacity**
- **Type of market**
- **Type of heating**
- **14 areas + EU28**
- **Website access**
- **Online dynamic private report**

- **Volume sold in Euro**
- **Type of filter**
- **Type of basic design**
- **Energy class**
- **5 main manufacturers**
- **Your own ranking**
- **Your own market share**
- **Market growth**
- **38 countries/areas**
- **Website access**
- **Online dynamic private report**

## Usual Participants



**2VV**  
**AIRTECNICS**  
**BIDDLE**  
**FLÄKTGROUP**  
**FLOWAIR**  
**FRICO**  
**IZTT**  
**OLEFINI**  
**SABIANA**  
**SOLER&PALAU**



**AFPRO FILTERS**  
**CAMFIL**  
**DELTRIAN**  
**DELTRIAN NORGE**  
**ECOTIP**  
**GENERAL FILTERS ITALY**  
**GENERAL FILTERS HAVAC**  
**INTERFIL**  
**JACK FILTER**  
**JASUN**  
**MANN+HUMMEL**  
**MIKROPOR**  
**RESEMA**  
**SAGICOFIM**  
**TROX**  
**ULTRAMARE**  
**VOLZFILTERS**

# Air Handling Units

The balance between higher air quality and energy efficiency will again be on spotlight. Wider spread of AHU accessories, allowing to improve air quality, is expected.

## Type of market data

- Volume sold in Euro
- Volume sold in unit
- Air flow capacity
- Type of heat recovery
- Units with compressor
- Units with integrated controls
- Units with adiabatic coolers
- Energy class
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 42 countries/areas
- Website access
- Online dynamic private report
- Quarterly evolution

## Usual participants

2VV	DAIKIN	KORF	SIG AIR HANDLING
AERA	DOGU IKLIMLENDIRME	LEMMENS	INTERNATIONAL
AIRFIT	ENEKO	LENNOX	STULZ TECNIVEL
ALDAG	EUROCLIMA	LINDAB	SWEGON
ALDES	EVAC	LMF CLIMA	SYSTEMAIR
AL-KO THERM	EVAIR	LORAN	TCF
ARCALO	EXHAUSTO	MARK CLIMATE	TERMOFAN
ARCELIK	FAST	MANDIK	TERMOVENT
ATC Air Trade Centre	FLÄKTGROUP	MEHITS	TRANE
ATLANTIC	FLÄKTWOODS	MEKAR	TROX
BIDDLE	FLEXIT	MENERGA	VENT SERVICE
BLUESTAR	FRANCE AIR	NEDAIR	VIACLIMATE
BOREAS	GI HOLDING	NIBE AIRSITE	VIM
CALADAIR	GLOBALVENT	OCRAM	VTS
CAN KLIMATEKNIK	HOLLAND HEATING	ORANGE CLIMATE	WAVES AIRCON
CARRIER	HYDRONIC	PROKLIMA	WEGER WALTER
CETRA	IMBAT	RHOSS	WOLF GMBH
CIAT	IV PRODUKT	SABIANA	ZOPPELLARO
CIC	JOHNSON CONTROLS	SALDA	
CLIVET	KLAS	SANDOMETAL	
COVENT	KOMFOVENT		



# Fan coil units

More attention to the quality of the Fan coils and additional accessories to improve air quality.

# Chilled beams

Fluctuating by country market evolution results in overall growth of Chilled beams sales in EU28.

## Type of market data

- Volume sold in unit and in euro
- Type of mounting
- Number of pipes
- Type of motor
- Type of control
- Share of units with valves
- Energy class
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 38 countries/areas
- Website access
- Online dynamic private report
- Quarterly evolution

- Volume sold in Euro
- Passive/active
- Integrated/exposed
- Perimeter units
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growthn
- 36 countries/areas
- Website access
- Private analysis

## Usual participants



AERMEC  
AERTESI  
ALDAG  
BIDDLE  
BINI CLIMA  
CARRIER  
CIAT  
CLIMAVENETA  
CLIVET  
DAIKIN  
EURAPO  
EUROFRED  
FRANCE AIR  
FLÄKTGROUP  
FRIGICOLL  
HITECSA  
INNOVA

GALLETTI  
GI HOLDING  
GREE  
JCI  
LENNOX  
LINDAB  
MIDEA  
OLIMPIA SPLENDID  
RHOSS  
SABIANA  
SAMSUNG  
SONKOR GLOBAL  
SYSTEMAIR FRANCE  
TIBA  
TRANE  
VENTILCLIMA



FLÄKTWOODS  
GRADA  
HALTON  
LINDAB  
MADEL  
OC WATERLOO  
SOLIDAIR  
SWEGON  
TROX

# Heat Exchangers

# Cooling Towers

## Adiabatic coolers

European incentives towards the green technologies will drive Heat exchangers market even during the crisis.

Uncertain future due to the postponed impact of the covid-19 crisis.

### Type of market data

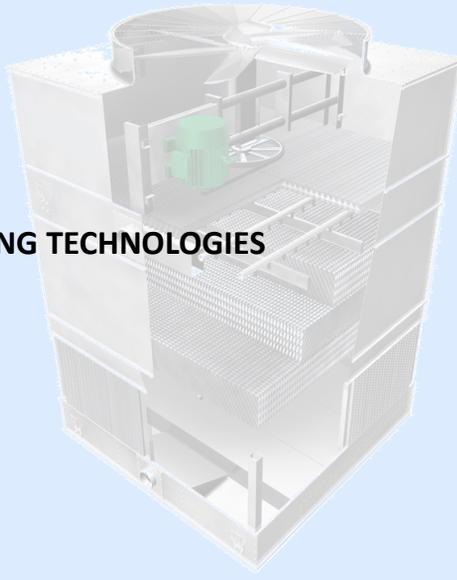
- Volume sold in Euro
- Volume sold in unit
- Type of technology
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 38 countries/areas
- Website access
- Online dynamic private report

- Volume sold in Euro
- Volume sold in unit
- Capacity (sprayed area)
- Closed wet/open wet
- Your own ranking
- Your own market share
- Market growth
- 36 countries/areas
- Website access
- Online dynamic private report

### Usual participants



AIRHEX ALONTE  
CARRIER  
CIAT  
EVAPCO  
FRITERM  
GÜNTNER  
KARYER  
KELVION KUBA  
KELVION SEARLE  
KOKXA KOBOL  
LENNOX  
LU-VE  
MODINE  
ROEN EST  
PROFROID INDUSTRIES  
REFRION  
SARBUZ  
THERMOKEY  
THERMOWAY



BALTIMORE AIRCOIL INTERNATIONAL  
CENK  
DECSA  
EVAPCO  
GOHL  
JACIR  
GÜNTNER  
KELVION  
MITA  
SPX COOLING TECHNOLOGIES

# Chillers and hydronic heat pumps

The F-Gas regulation and the energy efficiency trends are impacting the refrigerants and compressors used in the chillers, but also the requested capacity ranges. Sluggish demand is expected in the coming year, but not a deep drop thanks to a range of dynamic applications on growth.

## Type of market data

- Volume sold in unit
- Volume sold in Euro
- Capacity ranges
- Type of cooling/heating
- Type of technology
- Type of compressor
- Type of refrigerant
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 43 countries/areas
- Website access
- Online dynamic private report
- Quarterly evolution

## Usual participants

ADVANTIX  
AERMEC  
AIREDALE  
CARRIER  
CIAT  
CLIMAVENETA  
CLIVET  
DAIKIN  
FLÄKTGROUP  
EFFICIENT ENERGY  
EMMETTI  
EUOFRED  
FRIGICOLL  
ICS  
IMMERGAS  
GALLETTI  
GI HOLDING  
GREE  
HITACHI  
HITECSA  
IMBAT

JCI  
KEYTER  
KORF  
LENNOX  
MIDEA  
MTA  
OLIMPIA SPLENDID  
RC GROUP  
RHOSS  
SAMSUNG  
SIRE  
SMARTD  
STULZ  
SWEGON OPERATIONS  
SYSTEMAIR FRANCE  
SYSTEMAIR ITALY  
THERMOCOLD  
TRANE  
UNIFLAIR  
VENCO  
VERTIV

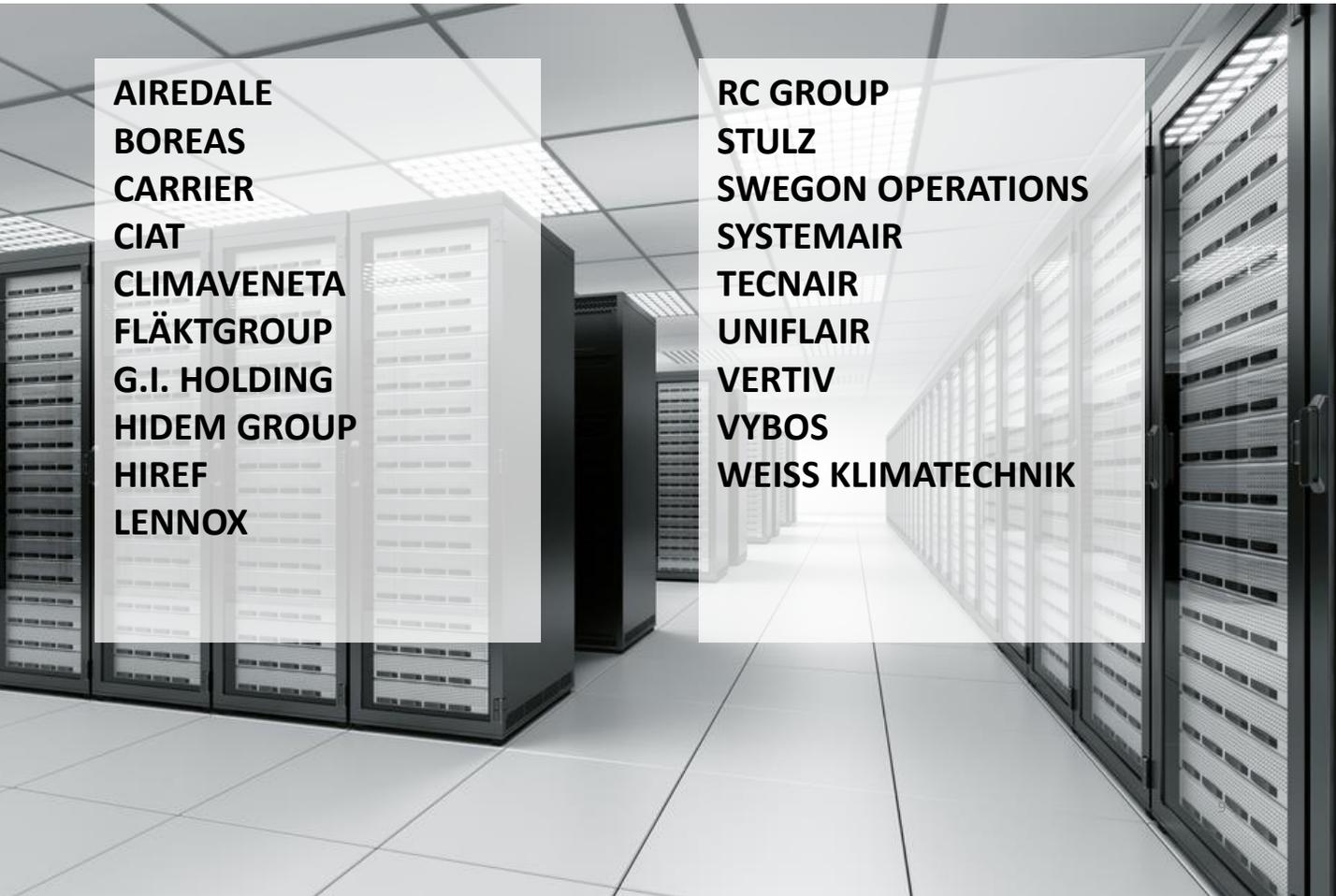
# IT cooling

The market of Precision Air Conditioners is leaving room for alternative cooling solutions less energy consuming. Boosting data centers secure the bright prospects for IT Cooling systems.

## Type of market data

- Volume sold in unit
- CRAC DX / CW
- Rack and In-row
- TLC units
- Integrated free-cooling
- Units with modulating compressor
- Indirect evaporative coolers
- Air handling units
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 44 countries/areas
- Website access
- Online dynamic private report

## Usual participants



**AIREDALE**  
**BOREAS**  
**CARRIER**  
**CIAT**  
**CLIMAVENETA**  
**FLÄKTGROUP**  
**G.I. HOLDING**  
**HIDEM GROUP**  
**HIREF**  
**LENNOX**

**RC GROUP**  
**STULZ**  
**SWEGON OPERATIONS**  
**SYSTEMAIR**  
**TECNAIR**  
**UNIFLAIR**  
**VERTIV**  
**VYBOS**  
**WEISS KLIMATECHNIK**

# Rooftops

Strongly impacted by the covid-19 crisis, the positions of Rooftops on EMEA market are becoming even more shaky in comparison to other less consuming solutions.

# Pool Dehumidifiers

Weaker sales are expected as the renovations and new projects will slow down due to the pandemic crisis.

## Type of market data

- Volume sold in unit
- Capacity ranges
- Type of cooling
- Volume sold in Euro
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 38 countries/areas
- Website access
- Online dynamic private report
- Quarterly evolution

- Volume sold in unit
- Single/double flow
- Chilled water/direct expansion
- With/without thermodynamic dehumidification
- Your own market share
- Your own ranking
- Market growth
- 38 countries/areas

## Usual participants



CARRIER  
CIATESA  
CLIMAVENETA  
CLIVET  
DAIKIN  
ENEKO  
GI HOLDING  
HITECSA  
IMBAT  
JCI  
KEYTER  
LENNOX  
MIDEA  
PROVENT  
SWEGON OPERATIONS  
SYSTEMAIR  
TRANE



AERA  
ALDAG  
ARCELIK  
ATC Air Trade Centre  
CIC  
DENCOHAPPEL  
DOĞU İKLİMLENDİRME  
ENEKO  
EUROCLIMA  
FRIVENT  
HIDEW  
HIDROS  
IMBAT  
KLAS  
PROKLIMA  
RHOSS  
SIG AIR HANDLING INTERNATIONAL  
SYSTEMAIR  
TERMOFAN  
ZODIAC

# VRF (Variable Refrigerant Flow)

The development of the VRF technology is impacting the traditional air-conditioner market worldwide and could change the playing field. However, the covid-19 impact will slow down the VRF sales in the coming year.

## Type of market data

- Volume sold in unit
- Capacity ranges (for outdoor units)
- Type of application
- Type of outdoor units
- Type of indoor units
- 5 main manufacturers
- Your own ranking
- Your own market share
- Market growth
- 36 countries/areas
- Online dynamic private report

## Usual participants



ADVANTIX  
AIRWELL RESIDENTIAL  
ARCELIK  
ATLANTIC  
BOSCH  
CARRIER  
CHIGO  
CLIVET  
DAIKIN  
EUROFRED  
FORM GROUP  
FRIGICOLL  
GREE

ICG  
HAIER  
HISENSE-HITACHI  
JCI-HITACHI  
KORF  
LENNOX  
LG ELECTRONICS  
MIDEA  
MITSUBISHI HEAVY  
PANASONIC  
SAMSUNG  
TOSHIBA

# GENERAL CONDITIONS AND PROCEDURES TO PARTICIPATE IN THE STATISTICS PROGRAMMES

## **A. Confidentiality**

The sale data collection **IS HIGHLY CONFIDENTIAL AND ANONYMOUS**. The individual data are not disclosed to any third person. Eurovent Market Intelligence may be held liable of unintended disclosure.

The participants are not authorized to provide the results to any third person or participant neither publish any information publicly. The participants have a right to use the information for internal use only, but some data may be published with the agreement of Eurovent Market Intelligence and mentioning them as source.

## **B. Participants**

Only Original Equipment Manufacturers should provide data ; if you are only distributor, please indicate before which OEM the products come from or do not provide your sale data in order to avoid double counting.

The statistics programme **is open to all the market players**, no need to participate in the Eurovent Certification programmes or to be member of the Eurovent Association.

**NB: participants must declare the sales from all factories within their group/company.**

## **C. Procedure**

1. Each manufacturer receives an email indicating the beginning of the collection and containing the following documents: General Conditions and Procedures on Participation to statistics programmes and the table to fill in for the concerned period.

2. The Calendar and related documents are available on:

<https://www.eurovent-marketintelligence.eu>

3. Manufacturer fills in all sheets of the table.

4. Then, manufacturer sends the file by email or uploads it at the following address:

<https://www.eurovent-marketintelligence.eu> in “Data Collection”, with a first private login and password;

5. Then Eurovent Market Intelligence will process the data and prepare the final result report;

6. The full report will be sent to the manufacturer and/or will be available on the website at the following address:

<https://www.eurovent-marketintelligence.eu> in “Online Database”, with a second private login and password;

7. In addition to data concerning total sales in each country for each product category and depending on the statistics programme, you could also ask for your VIP password and access to the ranking of your company, market share and TOP5 (main 5 players (in alphabetical order) in each of your selection with the concentration ratio). These optional results (rank and TOP5) are submitted to some confidentiality requirements.

8. Eurovent Market Intelligence will estimate the total market size based on additional analyses and will send a global report based on this reassessed data.

9. Any involvement on your part implies full acceptance of Terms and Market intelligence Manual ([http://www.eurovent-marketintelligence.eu/fic\\_bdd/Market-Intelligence-Operating-Manual.pdf](http://www.eurovent-marketintelligence.eu/fic_bdd/Market-Intelligence-Operating-Manual.pdf))

10. Eurovent Market Intelligence can not be held liable for any reason whatsoever for the decisions made by a manufacturer on the basis of statistics or any other information that have been provided.

## **D. Participation fee**

To cover EMI expenses, results are subject to participation fees, please refer to table above. The corresponding invoice will be sent as soon as data is received.

Results and online access codes will only be sent after payment of invoice.

The programmes are free of charge for companies participating in the equivalent certification programme (except Quarterly Chiller). In such case, no invoice will be emitted.

Any amount, including down payment, not paid on due time will give rise to delay interests equivalent to three times the current legal interest rate, as well as the payment of a flat-rate amount of forty (40) Euros for recovery expenses.

## **E. Calendar (annual collections)**

2021, 4-5 January: opening of the annual collections and sending of format.

2021, 15 February: closure of the collections.

2021, 1-12 March: releasing of results and website access

2021, April: releasing of the reassessment results.

EMI reserves the right to modify this calendar according to the collection progress.

For more information please contact Mr. Yannick Cotellet or Ms. Beyza Aykurt at [statistics@eurovent-marketintelligence.eu](mailto:statistics@eurovent-marketintelligence.eu) or +33 (0)1 75 44 71 77/78.