

World Air Conditioner Demand by Region

April 2015

IRAIA 一般社団法人
日本冷凍空調工業会

The Japan Refrigeration and Air Conditioning Industry Association

World Air Conditioner Demand by Region

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The Japan Refrigeration and Air Conditioning Industry Association

The Japan Refrigeration and Air Conditioning Industry Association (JRAIA) has just summarized the estimated results of 2014 air conditioner (AC) demand in the main countries around the world. These estimates are performed by the JRAIA's Air Conditioning Global Committee every year and were collected this time for AC demand in the main countries during the past six years from 2009 to 2014.

Note: The AC demand summarized in this document stands for the total AC demand for houses, buildings, and other structures comprising demand of "Room Air Conditioners (RAC)," including window type and small-sized split type ACs as well as "Packaged Air Conditioners (PAC)." Breakdown for RAC demand is given only from 2012 to 2014.

1. Overview

1) Overall AC Demand

The 2014 world AC demand is estimated to reach 96.23 million units with a 0.5% decrease compared with the previous year. When dividing the 2014 AC demand into the main markets of Japan, China, Asian countries other than Japan and China, Europe, North America, and other countries, the largest market is China, whose demand reached 34.94 million units with a 2.0% decrease. Chinese demand occupies 36.3% of the total world demand. The second largest market is North America, whose demand reached 14.75 million units with a 4.9% increase. The third largest market is Asia, excluding the countries of Japan and China, whose demand reached 14.31 million units with a 4.7% increase.

Japan reached 9.34 million units with a 4.9% decrease, followed by Latin America with 8.21 million units and a 3.3% increase, and Europe with 5.69 million units and a 15.6% decrease.

2) "Room Air Conditioners (RAC)"

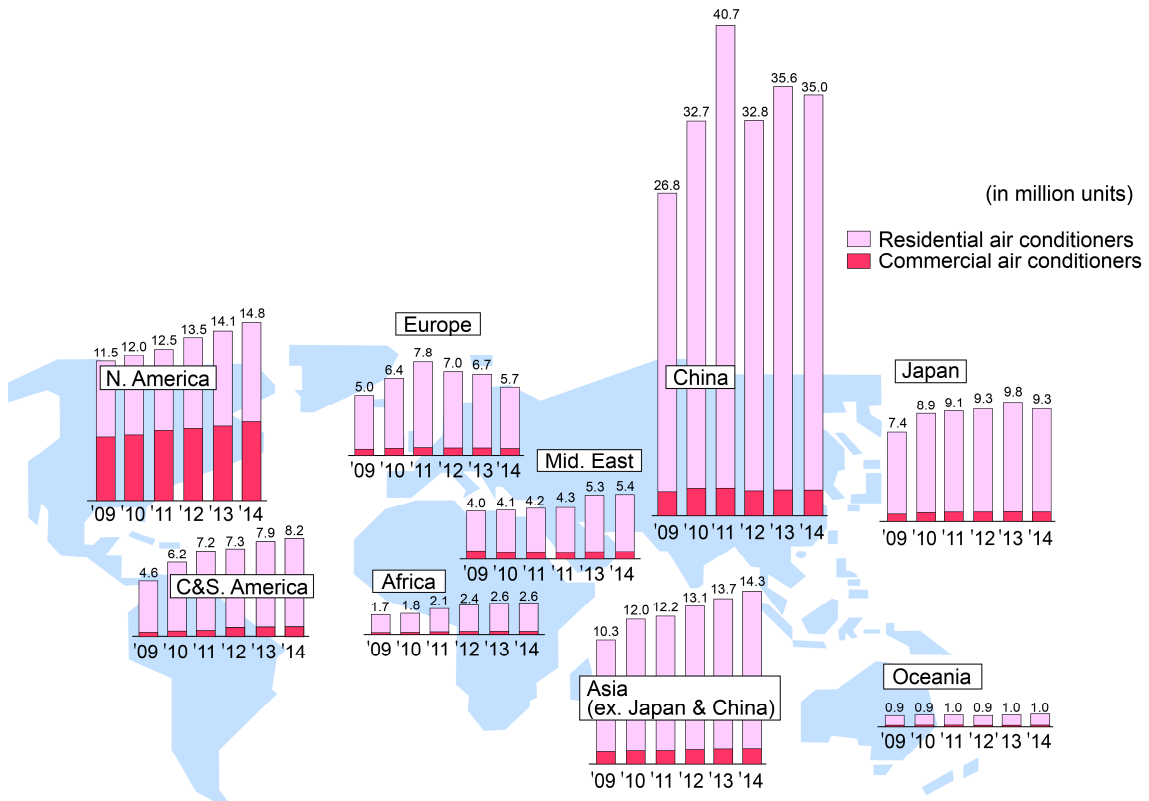
The 2014 world RAC demand is estimated to reach 82.90 million units with a 1.0% decrease compared with the previous year. The largest market is China, whose demand reached 32.79 million units with a 2.0% decrease. The second largest market is Asia, excluding Japan and China, whose demand reached 13.01 million units with a 5.1% increase. The third largest market is Japan, whose demand reached 8.50 million units with a 5.7% decrease.

North America reached 8.24 million units with a 4.4% increase, followed by Latin America with 7.39 million units and a 3.5% increase, and Europe with 5.04 million units and a 16.6% decrease.

3) “Packaged Air Conditioners (PAC)”

The 2014 world PAC demand is estimated to reach 13.33 million units with a 3.0% increase compared with the previous year. The largest market is North America, whose demand reached 6.52 million units with a 5.7% increase. The second largest market is China, whose demand reached 2.15 million units with a 0.4% decrease. The third largest market is Asia, excluding the countries of Japan and China, whose demand reached 1.31 million units with a 1.2% increase. Japan reached 0.84 million units with a 4.0% increase, followed by Europe with 0.65 million units and a 6.5% decrease, and the Middle East with 0.65 million units and a 3.0% increase.

Note: The graph shows RAC and PAC demand by region from 2009 to 2014.



2. Target and Method to Survey

1) Scope and Division of Products

The targeted ACs are used for houses, buildings, and other structures, and completed units including heat pump types for both cooling and heating. Portable type ACs and fan coil units used for hydronic system are excluded.

RAC demand consists of window type and small-sized split type ACs as well as residential-use multi systems.

PAC demand consists of commercial-use medium/large-sized split type ACs, remote condenser type ACs, single packaged ACs, and VRF systems, including unitary type ACs and unitary type heat pumps that are mainstream in North America.

2) Method to Survey

The JRAIA has collected and compiled the JRAIA market demand survey format reported by the member companies of the JRAIA's Air Conditioning Global Committee, and projected the estimated demand in each major market.

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* "Asia in total": AC demand in Asia, excluding countries of Japan and China.

* Period: from January to December in the calendar year

* The AC demand in 2013 has been revised and adjusted as necessary.

* From 2012 onward, estimated demand of VRF systems has been listed to be included in PAC demand.

The VRF demand in each country is shown only if country demand exceeds 5,000 units. The same is listed in Japan for the fiscal year from April to March.

(1) Overall AC demand

(in thousands)

	2009	2010	2011	2012	2013	2014
World total	72,229	85,002	96,791	90,514	96,691	96,231
Japan	7,384	8,931	9,057	9,271	9,817	9,336
Overseas	64,845	76,071	87,734	81,243	86,874	86,895
China	26,804	32,719	40,729	32,764	35,632	34,938
Asian countries	10,297	12,005	12,217	13,065	13,672	14,314
India	2,800	3,506	3,547	3,500	3,633	3,862
Indonesia	1,257	1,532	1,638	2,030	2,246	2,286
South Korea	1,155	1,177	1,227	1,190	1,236	1,236
Thailand	760	1,034	933	1,112	1,163	1,210
Taiwan	829	878	922	987	952	1,014
Malaysia	775	829	816	871	902	893
Pakistan	708	677	724	623	613	678
Vietnam	512	702	659	917	998	1,110
Philippines	503	502	561	611	664	687
Hong Kong incl. Macao	540	575	551	538	539	538
Singapore	159	158	162	163	163	161
Bangladesh	121	131	147	164	156	170
Myanmar		61	70	80	123	180
Sri Lanka	55	55	68	79	80	81
Cambodia		65	69	77	81	85
Others	123	123	123	123	123	123
the Middle East	3,996	4,054	4,246	4,279	5,300	5,355
Saudi Arabia	1,462	1,417	1,581	1,666	2,226	2,238
Israel	304	317	524	516	495	478
UAE	687	577	497	493	713	728
Iran	470	497	462	447	452	470
Iraq	136	276	274	296	315	306
Oman	261	246	248	217	297	305
Qatar	199	177	189	179	275	284
Kuwait	125	125	144	147	214	217
Bahrain	77	77	77	82	82	80
Lebanon	62	76	69	68	69	77
Others	213	269	181	168	162	172
Europe	4,994	6,400	7,760	6,961	6,739	5,689
Russia	918	1,442	2,625	2,000	1,891	1,442
Turkey	572	717	977	1,107	1,027	849
Italy	953	1,037	1,035	919	958	774
Spain	541	731	643	516	510	479
France	344	419	400	355	362	348
Ukraine	119	380	415	366	339	233
Greece	376	279	240	278	229	188
UK	130	150	161	154	153	160
Germany	110	113	126	127	129	128
Bulgaria	68	86	104	113	95	88
Romania	89	81	92	106	101	86
Portugal	96	132	110	69	66	65
Poland	55	74	73	70	69	70
Norway	51	73	72	66	61	56
Sweden	69	65	66	55	53	57
Netherlands	42	53	53	48	49	51
Others	461	568	568	612	647	615
North America	11,543	11,989	12,525	13,505	14,060	14,754
USA	11,220	11,608	12,126	13,097	13,662	14,354
Canada	323	381	399	408	398	400
Latin America	4,642	6,203	7,157	7,333	7,943	8,208
Brazil	2,296	3,448	3,492	3,514	4,212	4,451
Argentina	850	1,092	1,331	1,352	1,302	1,305
Mexico	709	662	889	1,021	1,034	1,073
Venezuela	137	163	401	413	371	330
Colombia	115	114	167	176	187	210
Panama			159	169	170	161
Puerto Rico	154	177	150	129	133	134
Peru			128	111	117	115
Chile		178	121	128	86	71
Ecuador	95	96	113	100	102	103
Cuba		93	89	98	106	116
Others	286	180	117	122	123	139
Africa	1,654	1,757	2,130	2,417	2,555	2,595
Egypt	472	541	747	803	765	781
Nigeria	330	349	412	488	566	603
South Africa	200	220	203	215	221	232
Libya	165	149	180	174	189	159
Algeria	131	144	172	176	206	205
Morocco			122	131	132	135
Ghana				95	97	97
Others	356	354	294	335	379	383
Oceania	915	944	970	919	973	1,042
Australia	813	835	861	817	869	937
New Zealand	95	102	102	95	97	98
Others	7	7	7	7	7	7

(2) Room Air Conditioners (RAC)

(in thousands)

	2009	2010	2011	2012	2013	2014
World total	61,336	73,420	84,565	78,026	83,756	82,904
Japan	6,775	8,242	8,279	8,487	9,013	8,500
Overseas	54,561	65,178	76,286	69,539	74,743	74,404
China	24,787	30,424	38,425	30,677	33,472	32,786
Asian countries	9,216	10,856	11,056	11,823	12,379	13,005
India	2,676	3,363	3,383	3,333	3,446	3,674
Indonesia	1,224	1,493	1,588	1,941	2,153	2,198
South Korea	579	566	635	622	668	668
Thailand	698	957	855	1,028	1,072	1,113
Taiwan	807	856	900	939	901	960
Malaysia	669	751	749	793	821	810
Pakistan	690	654	697	593	583	646
Vietnam	477	670	632	877	956	1,070
Philippines	467	467	515	563	608	628
Hong Kong incl. Macao	509	541	517	506	506	505
Singapore	140	137	141	141	140	137
Bangladesh	115	116	135	150	142	152
Myanmar		56	65	74	117	174
Sri Lanka	50	50	62	73	73	74
Cambodia		64	67	75	78	81
Others	115	115	115	115	115	115
the Middle East	3,297	3,474	3,639	3,681	4,667	4,703
Saudi Arabia	1,273	1,287	1,439	1,522	2,051	2,063
Israel	215	235	422	418	398	381
UAE	519	428	341	342	570	574
Iran	415	449	425	405	415	427
Iraq	113	258	253	274	286	276
Oman	215	209	209	184	261	266
Qatar	165	147	158	148	241	252
Kuwait	87	90	102	103	163	166
Bahrain	57	64	65	70	70	68
Lebanon	56	69	62	61	62	70
Others	182	238	163	154	150	160
Europe	4,411	5,741	7,037	6,269	6,048	5,043
Russia	860	1,381	2,523	1,884	1,771	1,349
Turkey	545	679	916	1,025	944	773
Italy	906	983	977	872	915	731
Spain	443	609	521	424	413	379
France	268	316	305	269	279	275
Ukraine	113	365	403	353	325	225
Greece	353	260	225	266	219	178
UK	61	70	76	73	73	77
Germany	74	75	83	84	84	85
Bulgaria	64	83	101	111	93	86
Romania	82	76	87	101	96	80
Portugal	83	118	97	60	59	58
Poland	43	57	59	57	56	56
Norway	47	70	69	63	59	54
Sweden	64	61	62	52	50	54
Netherlands	30	38	37	33	34	35
Others	375	500	496	542	578	548
North America	6,270	6,550	6,726	7,545	7,894	8,237
USA	6,176	6,419	6,580	7,400	7,754	8,092
Canada	94	131	146	145	140	145
Latin America	4,298	5,750	6,661	6,584	7,145	7,393
Brazil	2,127	3,195	3,243	3,147	3,809	4,028
Argentina	838	1,073	1,302	1,295	1,248	1,261
Mexico	657	597	809	850	847	882
Venezuela	125	151	377	388	349	311
Colombia	108	107	156	160	170	190
Panama			143	150	151	141
Puerto Rico	117	136	106	83	83	82
Peru			111	94	99	97
Chile		166	113	117	78	66
Ecuador	93	94	108	95	97	98
Cuba		92	88	96	104	114
Others	233	139	105	109	110	123
Africa	1,501	1,585	1,910	2,168	2,294	2,337
Egypt	428	489	675	733	696	717
Nigeria	310	324	386	458	533	567
South Africa	140	153	149	153	158	173
Libya	163	147	177	171	186	156
Algeria	128	141	160	165	192	191
Morocco			111	119	120	122
Ghana				82	84	84
Others	332	331	252	287	325	327
Oceania	781	798	832	792	844	900
Australia	695	708	741	706	756	811
New Zealand	80	84	85	80	82	83
Others	6	6	6	6	6	6

(3) Breakdown for RAC demand

	2012		2013		2014	
	Window-Type	Split-Type	Window-Type	Split-Type	Window-Type	Split-Type
World total	13,157	64,869	14,193	69,563	14,380	68,524
Japan		8,487		9,013		8,500
Overseas	13,157	56,382	14,193	60,550	14,380	60,024
China	356	30,321	348	33,124	325	32,461
Asian countries	1,991	9,832	1,897	10,482	1,853	11,152
India	806	2,527	747	2,699	703	2,971
Indonesia	15	1,926	14	2,139	9	2,189
South Korea	12	610	12	656	12	656
Thailand	5	1,023	5	1,067	4	1,109
Taiwan	238	701	215	686	216	744
Malaysia	5	788	4	817	4	806
Pakistan	69	524	50	533	46	600
Vietnam	4	873	3	953	3	1,067
Philippines	375	188	405	203	418	210
Hong Kong incl. Macao	325	181	318	188	312	193
Singapore	6	135	5	135	5	132
Bangladesh	40	110	29	113	31	121
Myanmar	5	69	4	113	4	170
Sri Lanka	25	48	25	48	25	49
Cambodia	1	74	1	77	1	80
Others	60	55	60	55	60	55
the Middle East	1,635	2,046	2,480	2,187	2,480	2,223
Saudi Arabia	972	550	1,385	666	1,385	678
Israel	10	408	10	388	10	371
UAE	110	232	330	240	320	254
Iran	225	180	218	197	196	231
Iraq	63	211	63	223	69	207
Oman	81	103	154	107	164	102
Qatar	71	77	160	81	170	82
Kuwait	31	72	90	73	92	74
Bahrain	31	39	31	39	31	37
Lebanon	1	60	1	61	1	69
Others	40	114	38	112	42	118
Europe	116	6,153	104	5,944	92	4,951
Russia	38	1,846	33	1,738	29	1,320
Turkey	0	1,025	0	944		773
Italy	6	866	6	909	5	726
Spain	8	416	9	404	8	371
France	4	265	5	274	4	271
Ukraine	8	345	7	318	4	221
Greece	0	266	0	219		178
UK	1	72	1	72	1	76
Germany	6	78	4	80	4	81
Bulgaria	1	110	1	92	1	85
Romania	2	99	1	95	1	79
Portugal	0	60	0	59		58
Poland	1	56	1	55	1	55
Norway	0	63	0	59		54
Sweden	0	52	0	50		54
Netherlands	0	33	0	34		35
Others	41	501	36	542	34	514
North America	7,082	463	7,372	522	7,647	590
USA	7,010	390	7,303	451	7,578	514
Canada	72	73	69	71	69	76
Latin America	1,568	5,016	1,568	5,577	1,564	5,829
Brazil	744	2,403	781	3,028	758	3,270
Argentina	135	1,160	124	1,124	118	1,143
Mexico	266	584	261	586	271	611
Venezuela	109	279	92	257	83	228
Colombia	45	115	46	124	48	142
Panama	24	126	24	127	30	111
Puerto Rico	42	41	41	42	40	42
Peru	25	69	25	74	24	73
Chile	28	89	24	54	24	42
Ecuador	30	65	23	74	23	75
Cuba	84	12	91	13	100	14
Others	36	73	36	74	45	78
Africa	344	1,824	351	1,943	347	1,990
Egypt	75	658	75	621	76	641
Nigeria	75	383	83	450	92	475
South Africa	25	128	25	133	25	148
Libya	16	155	15	171	13	143
Algeria	47	118	37	155	34	157
Morocco	3	116	3	117	3	119
Ghana	1	81	1	83	1	83
Others	102	185	112	213	103	224
Oceania	65	727	73	771	72	828
Australia	61	645	69	687	68	743
New Zealand	3	77	3	79	3	80
Others	1	5	1	5	1	5

(4) Packaged Air Conditioners (PAC)

(in thousands)

	2009	2010	2011	2012	2012(VRF)	2013	2013(VRF)	2014	2014(VRF)
World total	10,893	11,582	12,226	12,488	994	12,935	1,105	13,327	1,187
Japan	609	689	778	784	125	804	126	836	134
Overseas	10,284	10,893	11,448	11,704	869	12,131	979	12,491	1,053
China	2,017	2,295	2,304	2,087	500	2,160	597	2,152	653
Asian countries	1,081	1,149	1,161	1,242	174	1,293	171	1,309	181
India	124	143	164	167	26	187	22	188	25
Indonesia	33	39	50	89	6	93	7	88	9
South Korea	576	611	592	568	101	568	100	568	100
Thailand	62	77	78	84		91	5	97	5
Taiwan	22	22	22	48	8	51	8	54	9
Malaysia	106	78	67	78	5	81	5	83	5
Pakistan	18	23	27	30		30		32	
Vietnam	35	32	27	40	5	42	6	40	8
Philippines	36	35	46	48		56		59	
Hong Kong incl. Macao	31	34	34	32		33		33	5
Singapore	19	21	21	22	8	23	7	24	7
Bangladesh	6	15	12	14		14		18	
Myanmar		5	5	6		6		6	
Sri Lanka	5	5	6	6		7		7	
Cambodia		1	2	2		3		4	
Others	8	8	8	8		8		8	
the Middle East	699	580	607	598	13	633	14	652	18
Saudi Arabia	189	130	142	144		175		175	
Israel	89	82	102	98		97		97	
UAE	168	149	156	151		143		154	
Iran	55	48	37	42		37		43	
Iraq	23	18	21	22		29		30	
Oman	46	37	39	33		36		39	
Qatar	34	30	31	31		34		32	
Kuwait	38	35	42	44		51		51	
Bahrain	20	13	12	12		12		12	
Lebanon	6	7	7	7		7		7	
Others	31	31	18	14		12		12	
Europe	583	659	723	692	124	691	128	646	123
Russia	58	61	102	116	12	120	13	93	11
Turkey	27	38	61	82	22	83	24	76	28
Italy	47	54	58	47	13	43	12	43	12
Spain	98	122	122	92	8	97	7	100	7
France	76	103	95	86	15	83	15	73	15
Ukraine	6	15	12	13		14		8	
Greece	23	19	15	12		10		10	
UK	69	80	85	81	15	80	15	83	17
Germany	36	38	43	43	10	45	10	43	11
Bulgaria	4	3	3	2		2		2	
Romania	7	5	5	5		5		6	
Portugal	13	14	13	9		7		7	
Poland	12	17	14	13		13		14	
Norway	4	3	3	3		2		2	
Sweden	5	4	4	3		3		3	
Netherlands	12	15	16	15		15		16	
Others	86	68	72	70	18	69	18	67	11
North America	5,273	5,439	5,799	5,960	26	6,166	31	6,517	39
USA	5,044	5,189	5,546	5,697	22	5,908	27	6,262	36
Canada	229	250	253	263		258		255	
Latin America	344	453	496	749	17	798	21	815	22
Brazil	169	253	249	367	8	403	12	423	13
Argentina	12	19	29	57		54		44	
Mexico	52	65	80	171		187		191	
Venezuela	12	12	24	25		22		19	
Colombia	7	7	11	16		17		20	
Panama			16	19		19		20	
Puerto Rico	37	41	44	46		50		52	
Peru			17	17		18		18	
Chile		12	8	11		8		5	
Ecuador	2	2	5	5		5		5	
Cuba		1	1	2		2		2	
Others	53	41	12	13		13		16	
Africa	153	172	220	249	5	261	5	258	5
Egypt	44	52	72	70		69		64	
Nigeria	20	25	26	30		33		36	
South Africa	60	67	54	62		63		59	
Libya	2	2	3	3		3		3	
Algeria	3	3	12	11		14		14	
Morocco			11	12		12		13	
Ghana				13		13		13	
Others	24	23	42	48		54		56	
Oceania	134	146	138	127	11	129	12	142	12
Australia	118	127	120	111	10	113	10	126	11
New Zealand	15	18	17	15		15		15	
Others	1	1	1	1		1		1	

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