



Value share of the European Central Plant market, by product %, 2007

This report will help you to:

- Identify market opportunities
- Understand market trends
- Keep up to date with market developments, the players and routes to market
- Develop sales, marketing and distribution strategies
- Stay ahead of the competition

## Introduction

These newly updated reports are available on a country by country basis and **in-depth format**. BSRIA's new air conditioning reports for the European market, to be published in November 2008, provides you with independent analysis of significant markets for these increasingly popular products.

The report covers key markets in the study including **France, Germany, Greece, Italy, Russia, Spain and UK**. The study covers central plant air and packaged air conditioning markets and each country is available to purchase individually.

## Study Overview

The total central plant air conditioning market in Europe was estimated at 2.4 billion euro in 2007. Continued growth maintained Germany's lead position in the central plant market, with the total market value reaching 582 million euro. The German packaged air conditioning market also enjoyed a significant growth. 2007 was a good year for the German minisplits market, which saw an increase of 16% from 2006.

Like previous years, minisplits with heat pumps and inverters have maintained their grip on the market. It is suggested that in a few years nearly all single splits, multisplits and VRF will be with heat pumps.

The French chiller market shifted significantly towards more units in the 17-100kW range. Fan coils enjoyed a strong growth with sales increasing by about 14,000 units from 2006.

The UK chiller market enjoyed a 33% growth in value. The fan coil segment is coming under increasing threat from the active chilled beam system, which has been taking market share in the office buildings and leisure sectors.

The Russian central plant market grew rapidly by 26%. Air handling units maintained their grip on the Russian market and accounted for more than half of the total value of the central plant market.

DX systems continue to present a challenge for the Spanish fan coil market, which have been gradually eroding their market share. Heat recovery options are increasing their share, with plate exchangers being the preferred type.

A very mild winter in Greece (2006/2007) incited an early air conditioning season, resulting in record sales especially for split systems.

2008 has been a disappointing year for the Italian packaged market. The impressive 20% growth in 2007 did

not continue through to 2008; however the situation is similar in many of the European countries. In 2008, the market is expected to shrink by approximately 32%. Sales for Italian indoor packaged in 2008 are estimated to reach the 2,070 units.

The German minisplits market increased significantly in 2007, an estimated 122,000 single split units were sold alone. Decreases were experienced in the windows, which dropped by 10% and moveables sales dropped by 6.6%.

## BSRIA Worldwide Market Intelligence

BSRIA's Worldwide Market Intelligence division (WMI) has been providing specialist market intelligence to the building services for over 25 years. Its multinational staff works with a wide network of industry contacts to source detailed, reliable data across a number of product areas.

BSRIA's European air conditioning study has been produced using a variety of research techniques including; desk research, face-to-face and telephone interviews with manufacturers, suppliers and distributors WMI's unrivalled mix of technical and market knowledge equates to confidence in decision-making and dependable results.

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- Value of market for central plant air conditioning (Euro million), 2006-2008(E)
- Chiller market by volume (units) and value (Euro million), 2006-2008(E)
- Chiller market by compressor type and by heat rejection method, volume (units) and value (Euro million), 2006-2008(E)
- Cross analysis of chiller market by size, type and heat rejection, volume, 2006-2008(E)
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