



Volume of market for central plant air conditioning (units), 2007

## Introduction

This study is part of a series of multi-client reports on the world's market for air conditioning. These newly updated reports are available on a country by country basis and **in-depth format**. BSRIA's new air conditioning reports for the Middle Eastern 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 **Middle East** including **Saudi Arabia, United Arab Emirates (UAE), Egypt and India**.

## Study Overview

Saudi Arabia and Egypt are promising markets for air conditioning products because of a hot climate and rapidly growing population. The total size of the central plant air conditioning market in Saudi Arabia is predicted to nearly triple in value in just five years by 2012.

Over the last few years, single splits sales in Saudi Arabia enjoyed a constant double figure growth in all product categories. VRF sales are almost doubling each year. The market for chillers, fan coils, AHUs and split systems will likely enjoy the highest growth; however the market for window/through the wall units have

Reciprocating chillers continue to have a major presence in the U.A.E. However, the popularity of these types of compressor is in decline. Facilitated by the increasing demand from district cooling, centrifugal chillers in the UAE look set to enjoy the greatest growth of all compressor types with an annual growth rate of 20% each year.

The fan coil market in the UAE has experienced impressive market growth with 275,000 units. Ducted concealed types, holding 72% of the indoor unit market, dominate indoor units in the UAE.

District cooling plants in Egypt are gaining popularity and have become an interesting application for both centrifugal and absorption chillers. Minisplits are experiencing a rapid growth in the packaged air conditioning market. Larger close control units are preferred in the Egyptian market for close controls, with more than 60% of the market value belonging to units larger than 20kW.

The Indian market for central plant air conditioning has enjoyed a steady growth in line with the strong growth of the building construction industry. The market is expected to decrease from 2009 and onwards.

The chiller market represents 70% of the Indian central plant market value, of the remaining 30% represented by the airside products; the major part is the AHU market. The fan coil market volume (units) enjoyed a 60% market growth rate due to increased hotel construction. Some manufacturers in India have ceased supplying reciprocating chillers and new companies have entered the market to supply screw and centrifugal chillers.

## 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 Middle East and India 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.

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

*Excel Overview* is available for the study.

For further details of this or any other WMI study please contact Tim Page at BSRIA:

Phone: +44 (0)1344 465629

Fax: +44 (0)1344 465626

Email: [tim.page@bsria.co.uk](mailto:tim.page@bsria.co.uk)

Website:

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