

Estimates of World Air Conditioner Demand

June 2025

JRAIA

The Japan Refrigeration and Air Conditioning Industry Association

Estimates of World Air Conditioner Demand by Country

June 2025

The Japan Refrigeration and Air Conditioning Industry Association

The Japan Refrigeration and Air Conditioning Industry Association (JRAIA) has compiled the estimated data on world air conditioner demand by country in 2024, as shown below.

* In this report, air conditioners are those used for houses, buildings, etc. and are classified into two: room air conditioners that include window-type and small-sized split-type air conditioners; and commercial air conditioners that cover those other than room air conditioners.

I. Overview

The world's total air conditioner demand in 2024 is estimated at 131,638 thousand units, which represents 106% of the world demand a year before.

Looking at the 2024 world demand in terms of Japan, China and other regions, the largest demand is from China, of which demand is estimated to have reached 49,726 thousand units, representing 105% of its 2024 demand. China's demand accounts for 38% of the world's total demand. Next to China, the Asian region (excluding Japan and China) stands at 25,249 thousand units, followed by North America with 19,199 thousand units, Japan with 10,187 thousand units, Europe with 9,533 thousand units and Latin America with 7,325 thousand units.

II. Covered Products and Survey Method

(1) Covered Products and Classification

Covered products are air conditioners used for houses, buildings, etc. as a complete air conditioning system. Heat pump-type cooling and heating air conditioners are included, but portable-type air conditioners and those using a chiller/heater system are excluded.

Room air conditioners consist of window-type air conditioners and small-sized single and multiple split-type air conditioners.

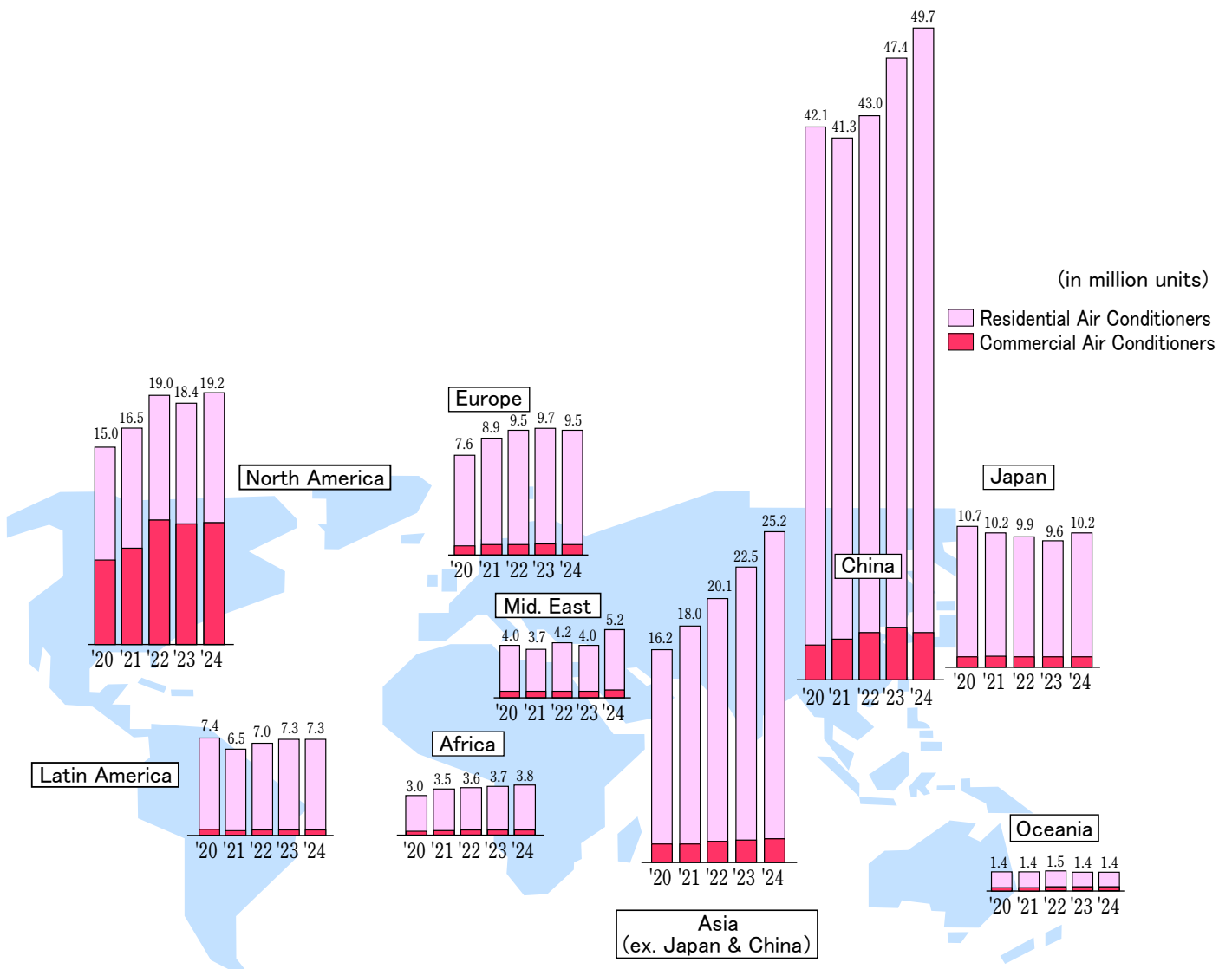
Commercial air conditioners consist of mainly medium- and large-sized split-type air conditioners, as well as remote condenser-type air conditioners, single package-type air conditioners and variable refrigerant flow (VRF) systems. Unitary air conditioners and unitary heat pumps that are the mainstream in the U.S. are included here.

(2) Survey Method

Global Committee's Overseas Air Conditioning Working Group has collected the statistics, conducted the survey and compiled the estimated results of world air conditioner demand.

Disclaimer:

JRAIA shall not be liable for any future change, interruption, suspension, abolition or other related matters regarding this data.



1. Total Number of Air Conditioners

(in thousand units)

	2020	2021	2022	2023	2024	% year on year
World total	107,447	110,041	117,770	123,932	131,638	106
Japan	10,687	10,201	9,885	9,589	10,187	106
Outside Japan	96,760	99,840	107,885	114,342	121,452	106
China	42,142	41,305	42,998	47,440	49,726	105
Asia total	16,196	17,983	20,066	22,464	25,249	112
India	4,575	6,283	7,650	9,231	11,945	
Indonesia	1,929	2,159	2,374	2,693	2,912	
Vietnam	2,153	1,877	1,825	1,929	2,199	
Thailand	1,515	1,438	1,496	1,584	1,707	
Taiwan	1,210	1,272	1,259	1,360	1,392	
Malaysia	902	867	889	913	954	
Hong Kong/Macau	482	530	526	526	523	
Bangladesh	184	208	253	341	487	
Philippines	755	822	870	922	432	
Singapore	113	121	129	127	129	
Others	2,378	2,406	2,794	2,838	2,569	
Middle East total	3,992	3,684	4,227	4,009	5,189	129
Saudi Arabia	1,233	1,170	1,485	1,484	1,834	
Israel	754	607	636	-	678	
UAE	546	516	563	599	560	
Oman	220	233	277	294	297	
Qatar	191	169	169	165	123	
Kuwait	123	133	155	150	-	
Bahrain	38	32	-	-	-	
Lebanon	50	32	32	-	38	
Others	837	793	909	1,317	1,519	
Europe total	7,604	8,885	9,517	9,650	9,533	99
Italy	1,201	1,533	1,686	1,666	1,781	
Spain	721	806	831	1,003	974	
Turkey	591	644	713	840	920	
France	729	791	821	865	780	
Greece	217	292	335	407	363	
Portugal	140	172	194	221	221	
Poland	164	183	214	200	206	
United Kingdom	179	213	237	232	197	
Germany	216	227	204	185	181	
Netherlands	133	159	162	163	154	
Bulgaria	159	154	230	187	154	
Romania	139	126	172	167	140	
Belgium	115	150	129	121	108	
Hungary	132	118	133	114	106	
Norway	72	85	111	117	105	
Sweden	68	72	108	90	81	
Finland	60	81	106	78	62	
Czech Republic	43	51	56	48	49	
Austria	40	44	44	41	40	
Denmark	29	35	38	33	30	
Switzerland	18	21	20	19	19	
Ireland	11	12	12	11	9	
Others	2,336	2,817	2,865	2,754	2,762	
North America total	15,029	16,515	19,026	18,416	19,199	104
USA	7,143	8,091	10,591	1,245	10,287	
Canada	372	458	551	275	541	
Latin America total	7,423	6,547	7,016	7,288	7,329	101
Africa total	2,981	3,489	3,572	3,699	3,791	102
Oceania total	1,396	1,432	1,464	1,376	1,435	104
Australia	1,174	1,178	1,205	1,143	1,209	
New Zealand	168	200	204	176	162	
Others	4	4	5	5	6	

*1 The period is the calendar year from January through December *2 'Asia total' refers to the sum of demand across Asian regions excluding Japan and China. *3 Values have been rounded, so the total of "2. Residential Air Conditioners" and "3. Commercial Air Conditioners" may not match the reported overall total. *4 In sections "2. Residential Air Conditioners" and "3. Commercial Air Conditioners", values marked with the "-" symbol are included under the region's "Other" or "Regional Total" categories. For this reason, the sum of these sections may not equal the overall total.

2. Residential Air Conditioners

(In thousand units)

	2022				2023				2024			
	Window-type	Split-type (Single)	Split-type (Multi)	Total	Window-type	Split-type (Single)	Split-type (Multi)	Total	Window-type	Split-type (Single)	Split-type (Multi)	Total
World total	-	-	-	99,899	-	-	-	105,857	-	-	-	113,514
Japan	-	-	-	9,059	-	-	-	8,784	-	-	-	9,354
Outside Japan	12,377	73,587	4,875	90,839	12,257	79,945	4,871	97,073	12,055	87,764	4,340	104,160
China	-	36,491	2,923	39,414	-	40,617	2,822	43,439	-	43,844	2,236	46,080
Asia total	1,953	16,328	223	18,505	2,044	18,531	203	20,778	1,600	21,609	227	23,437
India	858	6,532	14	7,404	906	8,033	-	8,939	988	10,626	16	11,630
Indonesia	-	2,303	6	2,309	-	2,616	6	2,622	-	2,832	7	2,838
Vietnam	-	1,735	13	1,749	-	1,833	17	1,850	-	2,098	18	2,116
Thailand	-	1,324	1	1,325	-	1,405	1	1,406	-	1,522	1	1,523
Taiwan	175	917	95	1,187	166	1,024	89	1,279	155	1,063	90	1,308
Malaysia	-	809	6	815	-	829	6	835	-	866	6	872
Hong Kong/Macau	301	184	15	500	318	169	15	501	310	168	19	497
Bangladesh	-	217	-	217	-	296	-	296	-	430	-	430
Philippines	488	314	3	805	510	340	-	851	-	355	-	355
Singapore	-	38	68	107	-	35	68	103	-	35	70	105
Others	132	1,954	1	2,086	144	1,950	1	2,095	147	1,615	1	1,763
Middle East total	1,014	2,671	0	3,684	985	2,492	0	3,477	761	3,793	0	4,554
Saudi Arabia	518	823	-	1,340	491	837	-	1,328	381	1,274	-	1,654
Israel	-	577	-	577	-	-	-	-	-	617	-	617
UAE	143	263	-	406	149	285	-	434	-	380	-	380
Oman	71	157	-	228	71	171	-	242	57	184	-	241
Qatar	59	80	-	139	55	81	-	136	30	62	-	92
Kuwait	20	82	-	102	16	84	-	100	-	93	-	93
Bahrain	-	-	-	-	-	-	-	-	-	48	-	48
Lebanon	-	29	-	29	-	-	-	-	-	35	-	35
Others	203	661	0	864	204	1,033	0	1,237	294	1,100	0	1,394
Europe total	96	7,453	1,130	8,679	88	7,480	1,235	8,803	92	7,344	1,263	8,699
Italy	-	1,175	440	1,615	-	1,131	465	1,596	-	1,211	496	1,707
Spain	-	582	75	657	-	711	91	802	-	675	97	772
Turkey	-	633	22	655	-	737	40	777	-	813	45	858
France	-	459	226	685	-	473	263	736	-	403	260	663
Greece	-	309	7	317	-	380	8	388	-	338	7	345
Portugal	-	133	43	176	-	151	49	200	-	146	50	196
Poland	-	172	18	190	-	156	23	179	-	156	29	185
United Kingdom	-	135	16	151	-	127	21	148	-	101	19	120
Germany	-	114	47	161	-	99	45	144	-	92	46	138
Netherlands	-	110	34	144	-	111	36	148	-	100	38	137
Bulgaria	-	210	14	224	-	170	12	182	-	140	10	150
Romania	-	155	8	163	-	150	7	157	-	126	6	132
Belgium	-	66	47	113	-	60	47	107	-	51	42	93
Hungary	-	118	10	129	-	101	9	110	-	94	9	102
Norway	-	107	2	109	-	112	2	114	-	101	2	102
Sweden	-	101	3	104	-	84	2	86	-	76	2	78
Finland	-	102	2	104	-	75	1	76	-	59	2	61
Czech Republic	-	37	11	48	-	32	10	42	-	30	11	40
Austria	-	26	10	36	-	23	10	33	-	22	11	32
Denmark	-	35	1	37	-	30	1	32	-	28	1	29
Switzerland	-	10	3	13	-	10	3	13	-	9	3	12
Ireland	-	4	0	5	-	5	0	5	-	3	0	3
Others	-	2,657	92	2,749	-	2,552	88	2,640	-	2,571	79	2,650
North America total	7,885	1,137	473	9,494	7,734	1,038	482	9,254	8,370	1,094	481	9,945
USA	-	949	428	1,377	-	807	438	1,245	-	852	428	1,280
Canada	-	188	45	233	-	231	44	275	-	242	53	294
Latin America total	1,036	5,523	55	6,614	1,001	5,803	58	6,862	822	6,008	59	6,889
Africa total	345	2,855	35	3,235	353	2,949	36	3,338	352	3,023	38	3,413
Oceania total	51	1,129	35	1,214	52	1,034	35	1,121	58	1,049	37	1,144
Australia	-	948	31	979	-	883	30	914	-	914	33	946
New Zealand	-	176	4	180	-	147	4	151	-	130	4	135
Others	-	4	0	4	-	4	0	4	-	5	0	5

*1 The period is the calendar year from January through December. *2 'Asia total' refers to the sum of demand across Asian regions excluding Japan and China. *3 Values have been rounded, so the total of "2. Residential Air Conditioners" and "3. Commercial Air Conditioners" may not match the reported overall total. *4 In sections "2. Residential Air Conditioners" and "3. Commercial Air Conditioners", values marked with the "-" symbol are included under the region's "Other" or "Regional Total" categories. For this reason, the sum of these sections may not equal the overall total.

3. Commercial Air Conditioners

(In thousand units)

	2022			2023			2024		
	PAC	VRF	Total	PAC	VRF	Total	PAC	VRF	Total
World total	15,396	2,476	17,871	15,112	2,963	18,075	15,379	2,746	18,124
Japan	677	148	825	660	146	805	684	149	833
Outside Japan	14,719	2,327	17,046	14,452	2,817	17,270	14,694	2,597	17,292
China	1,898	1,686	3,584	1,841	2,159	4,001	1,772	1,875	3,647
Asia total	1,314	247	1,561	1,416	270	1,686	1,514	298	1,812
India	193	53	246	226	65	291	235	79	314
Indonesia	56	9	65	60	10	70	63	11	73
Vietnam	65	12	77	67	12	79	70	13	84
Thailand	160	11	171	167	11	178	172	11	183
Taiwan	55	16	72	63	18	80	66	18	85
Malaysia	68	6	74	72	6	78	76	6	82
Hong Kong/Macau	18	8	26	17	9	26	17	8	26
Bangladesh	34	2	35	43	2	45	55	2	57
Philippines	57	8	65	62	9	71	67	10	77
Singapore	16	7	23	17	7	23	17	8	25
Others	592	115	707	622	121	743	675	131	806
Middle East total	510	33	542	500	33	533	586	49	635
Saudi Arabia	140	5	145	149	7	156	170	9	179
Israel	52	7	59	-	-	-	54	8	62
UAE	146	11	157	153	12	165	166	13	179
Oman	46	3	49	48	3	52	53	3	56
Qatar	27	3	30	26	3	30	28	3	31
Kuwait	52	1	53	49	1	50	-	-	-
Bahrain	-	-	0	-	-	-	-	-	-
Lebanon	2	1	3	-	-	-	2	1	3
Others	44	2	46	73	7	80	114	11	125
Europe total	641	197	838	650	197	847	633	201	834
Italy	43	29	72	40	30	70	42	31	74
Spain	158	16	174	184	17	201	183	19	202
Turkey	30	27	58	31	32	63	30	32	62
France	103	33	136	95	33	128	83	34	117
Greece	13	5	18	15	5	19	14	4	18
Portugal	13	5	18	17	5	22	21	5	25
Poland	18	5	24	16	5	21	15	6	21
United Kingdom	68	18	86	66	17	83	61	15	77
Germany	29	14	43	29	12	41	31	13	44
Netherlands	14	3	18	13	3	16	13	3	16
Bulgaria	3	3	5	2	3	5	2	2	4
Romania	7	2	9	8	2	10	6	2	7
Belgium	12	3	15	11	3	14	12	3	15
Hungary	3	2	5	2	2	4	2	2	3
Norway	2	0	2	3	0	3	2	0	3
Sweden	4	0	4	4	0	4	3	0	4
Finland	2	0	2	2	0	2	1	0	2
Czech Republic	6	2	8	5	1	6	6	2	8
Austria	6	2	8	5	2	7	6	2	8
Denmark	2	0	2	1	0	1	1	0	1
Switzerland	6	1	7	5	1	6	6	1	6
Ireland	6	1	7	6	1	7	5	1	6
Others	92	24	115	91	23	114	88	24	112
North America total	9,457	75	9,532	9,100	62	9,162	9,186	68	9,254
USA	9,144	70	9,214	-	-	0	8,945	62	9,007
Canada	314	4	318	-	-	0	241	6	247
Latin America total	363	39	402	384	42	426	396	44	440
Africa total	312	25	337	333	28	361	348	30	378
Oceania total	224	26	250	228	27	255	260	31	291
Australia	201	24	225	204	25	229	234	29	263
New Zealand	22	2	24	23	2	25	25	3	27
Others	1	0	1	1	0	1	1	0	1

*1 The period is the calendar year from January through December *2 'Asia total' refers to the sum of demand across Asian regions excluding Japan and China. *3 Values have been rounded, so the total of "2. Residential Air Conditioners" and "3. Commercial Air Conditioners" may not match the reported overall total. *4 In sections "2. Residential Air Conditioners" and "3. Commercial Air Conditioners", values marked with the "-" symbol are included under the region's "Other" or "Regional Total" categories. For this reason, the sum of these sections may not equal the overall total.

World Air Conditioner Demand by Region
June 2025

JRAIA

The Japan Refrigeration and Air Conditioning Industry Association