

Estimates of World Air Conditioner Demand

August 2026

JRAIA 一般社団法人 **日本冷凍空調工業会**

Estimates of World Air Conditioner Demand by Country

August 2026

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 2025, 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 2025 is estimated at 139,815 thousand units, which represents 106% of the world demand a year before.

Looking at the 2025 world demand in terms of Japan, China and other regions, the largest demand is from China, of which demand is estimated to have reached 57,075 thousand units, representing 115% of its 2025 demand. China's demand accounts for 41% of the world's total demand. Next to China, the Asian region (excluding Japan and China) stands at 24,404 thousand units, followed by North America with 19,778 thousand units, Japan with 10,573 thousand units, Europe with 9,561 thousand units and Latin America with 7,401 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.

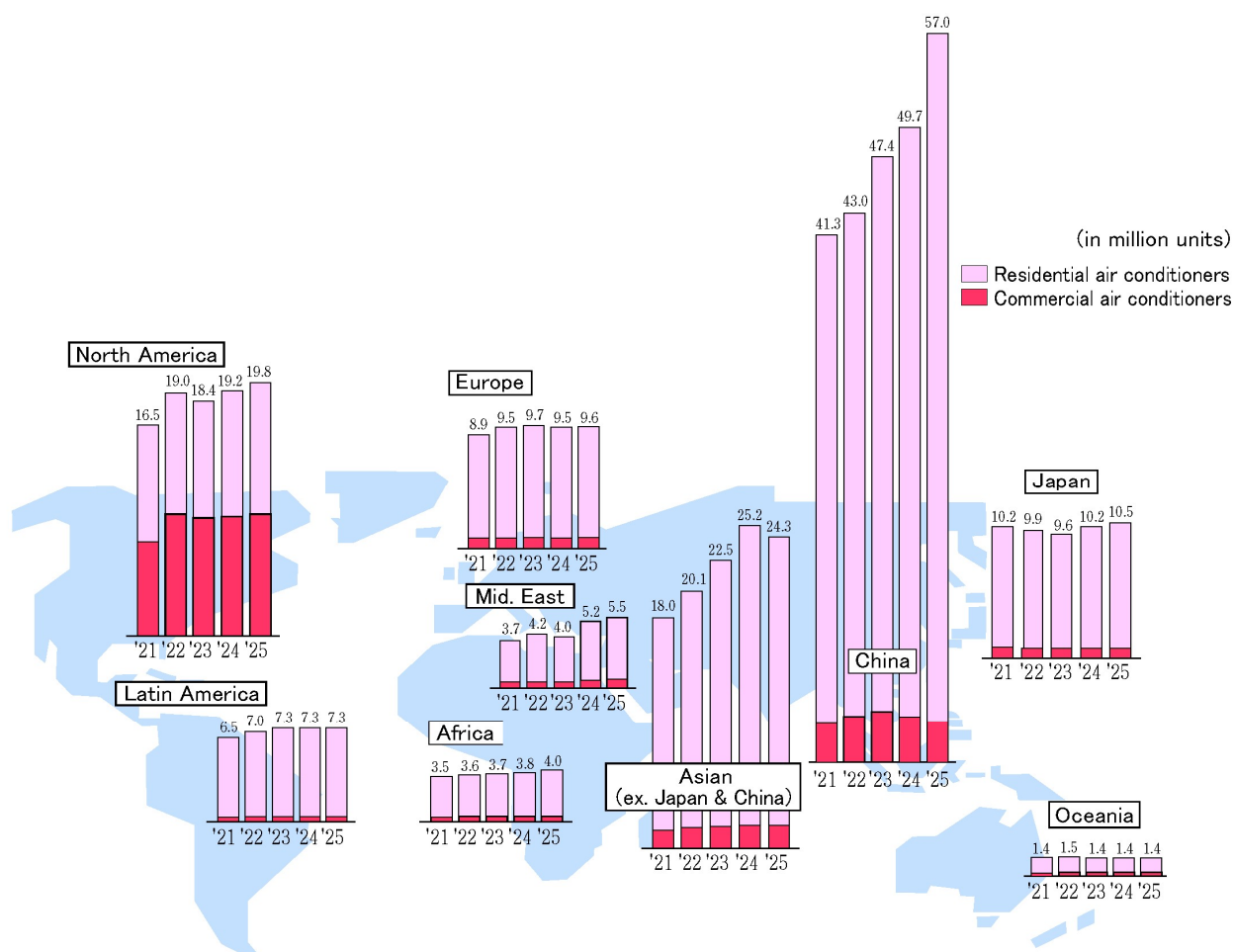
Commercial air conditioners consist of mainly medium- and large-sized split-type air conditioners, as well as remote condenser-type air conditioners, single package-type air conditioners and variable refrigerant flow (VRF) systems. Unitary air conditioners and unitary heat pumps that are the mainstream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

	2021	2022	2023	2024	2025	% year on year
World total	110,041	117,770	123,932	131,638	139,815	106
Japan	10,201	9,885	9,589	10,187	10,573	104
Outside Japan	99,840	107,885	114,342	121,452	129,241	106
China	41,305	42,998	47,440	49,726	57,075	115
Asia total	17,983	20,066	22,464	25,249	24,404	97
India	6,283	7,650	9,231	11,945	11,619	
Indonesia	2,159	2,374	2,693	2,912	2,768	
Vietnam	1,877	1,825	1,929	2,199	2,136	
Thailand	1,438	1,496	1,584	1,707	1,559	
Taiwan	1,272	1,259	1,360	1,392	1,263	
Malaysia	867	889	913	954	910	
Hong Kong/Macau	530	526	526	523	539	
Bangladesh	208	253	341	487	482	
Philippines	822	870	922	432	434	
Singapore	121	129	127	129	122	
Others	2,406	2,794	2,838	2,569	2,573	
Middle East total	3,684	4,227	4,009	5,189	5,581	108
Saudi Arabia	1,170	1,485	1,484	1,834	2,123	
Israel	607	636	-	-	736	
UAE	516	563	599	560	527	
Oman	233	277	294	297	250	
Qatar	169	169	165	123	104	
Kuwait	133	155	150	93	-	
Bahrain	32	-	-	-	-	
Lebanon	32	32	-	-	-	
Others	793	909	1,317	1,519	1,840	
Europe total	8,885	9,517	9,650	9,533	9,561	100
Italy	1,533	1,686	1,666	1,781	2,019	
Spain	806	831	1,003	974	1,097	
Turkey	644	713	840	920	816	
France	791	821	865	780	834	
Greece	292	335	407	363	284	
Portugal	172	194	221	221	266	
Poland	183	214	200	206	214	
United Kingdom	213	237	232	197	221	
Germany	227	204	185	181	208	
Netherlands	159	162	163	154	165	
Bulgaria	154	230	187	154	133	
Romania	126	172	167	140	-	
Belgium	150	129	121	108	115	
Hungary	118	133	114	106	125	
Norway	85	111	117	105	107	
Sweden	72	108	90	81	89	
Finland	81	106	78	62	61	
Czech Republic	51	56	48	49	70	
Austria	44	44	41	40	42	
Denmark	35	38	33	30	33	
Switzerland	21	20	19	19	18	
Ireland	12	12	11	9	9	
Others	2,817	2,865	2,754	2,762	2,542	
North America total	16,515	19,026	18,416	19,199	19,778	103
USA	8,091	10,591	1,245	10,287	11,095	
Canada	458	551	275	541	618	
Latin America total	6,547	7,016	7,288	7,329	7,401	101
Africa total	3,489	3,572	3,699	3,791	3,993	105
Oceania total	1,432	1,464	1,376	1,435	1,450	101
Australia	1,178	1,205	1,143	1,209	1,222	
New Zealand	200	204	176	162	159	
Others	4	5	5	6	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

(単位: 千台)

		2023				2024				2025			
		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		-	-	-	105,857	-	-	-	113,514	-	-	-	121,592
Japan		-	-	-	8,784	-	-	-	9,354	-	-	-	9,705
Outside Japan		12,257	79,945	4,871	97,073	12,055	87,764	4,340	104,160	11,300	96,290	4,297	111,887
China		-	40,617	2,822	43,439	-	43,844	2,236	46,080	-	51,990	1,871	53,861
Asia total		2,044	18,531	203	20,778	1,600	21,609	227	23,437	1,271	21,060	221	22,553
	India	906	8,033	-	8,939	988	10,626	16	11,630	660	10,591	16	11,267
	Indonesia	-	2,616	6	2,622	-	2,832	7	2,838	-	2,690	6	2,696
	Vietnam	-	1,833	17	1,850	-	2,098	18	2,116	-	2,028	18	2,046
	Thailand	-	1,405	1	1,406	-	1,522	1	1,523	-	1,373	1	1,374
	Taiwan	166	1,024	89	1,279	155	1,063	90	1,308	139	973	85	1,197
	Malaysia	-	829	6	835	-	866	6	872	-	821	6	827
	Hong Kong/Macau	318	169	15	501	310	168	19	497	327	158	22	507
	Bangladesh	-	296	-	296	-	430	-	430	-	425	-	425
	Philippines	510	340	-	851	-	355	-	355	-	350	-	350
	Singapore	-	35	68	103	-	35	70	105	-	33	65	98
Others		144	1,950	1	2,095	147	1,615	1	1,763	145	1,620	1	1,766
Middle East total		985	2,492	0	3,477	761	3,793	0	4,554	629	4,260	0	4,889
	Saudi Arabia	491	837	-	1,328	381	1,274	-	1,654	277	1,653	-	1,930
	Israel	-	-	-	0	-	617	-	617	-	670	-	670
	UAE	149	285	-	434	-	380	-	380	-	335	-	335
	Oman	71	171	-	242	57	184	-	241	-	191	-	191
	Qatar	55	81	-	136	30	62	-	92	-	71	-	71
	Kuwait	16	84	-	100	-	93	-	93	-	-	-	0
	Bahrain	-	-	-	-	-	48	-	48	-	-	-	0
	Lebanon	-	-	-	0	-	35	-	35	-	-	-	0
	Others	204	1,033	0	1,237	294	1,100	0	1,394	352	1,340	0	1,692
Europe total		88	7,480	1,235	8,803	92	7,344	1,263	8,699	92	7,102	1,497	8,691
	Italy	-	1,131	465	1,596	-	1,211	496	1,707	-	1,294	647	1,942
	Spain	-	711	91	802	-	675	97	772	-	772	102	874
	Turkey	-	737	40	777	-	813	45	858	-	723	39	762
	France	-	473	263	736	-	403	260	663	-	445	277	722
	Greece	-	380	8	388	-	338	7	345	-	262	7	269
	Portugal	-	151	49	200	-	146	50	196	-	172	63	235
	Poland	-	156	23	179	-	156	29	185	-	150	42	192
	United Kingdom	-	127	21	148	-	101	19	120	-	114	25	139
	Germany	-	99	45	144	-	92	46	138	-	103	52	155
	Netherlands	-	111	36	148	-	100	38	137	-	101	47	148
	Bulgaria	-	170	12	182	-	140	10	150	-	119	11	130
	Romania	-	150	7	157	-	126	6	132	-	-	-	-
	Belgium	-	60	47	107	-	51	42	93	-	53	47	100
	Hungary	-	101	9	110	-	94	9	102	-	108	11	119
	Norway	-	112	2	114	-	101	2	102	-	102	2	104
	Sweden	-	84	2	86	-	76	2	78	-	84	2	86
	Finland	-	75	1	76	-	59	2	61	-	58	2	60
	Czech Republic	-	32	10	42	-	30	11	40	-	44	17	61
	Austria	-	23	10	33	-	22	11	32	-	22	13	36
	Denmark	-	30	1	32	-	28	1	29	-	30	1	31
	Switzerland	-	10	3	13	-	9	3	12	-	9	3	12
	Ireland	-	5	0	5	-	3	0	3	-	3	-	3
Others		-	2,552	88	2,640	-	2,571	79	2,650	-	2,333	85	2,418
North America total		7,734	1,038	482	9,254	8,370	1,094	481	9,945	8,065	1,614	571	10,250
	USA	-	807	438	1,245	-	852	428	1,280	-	1,324	516	1,840
	Canada	-	231	44	275	-	242	53	294	-	290	55	345
Latin America total		1,001	5,803	58	6,862	822	6,008	59	6,889	825	6,070	60	6,955
Africa total		353	2,949	36	3,338	352	3,023	38	3,413	355	3,165	39	3,559
Oceania total		52	1,034	35	1,121	58	1,049	37	1,144	63	1,028	38	1,129
	Australia	-	883	30	914	-	914	33	946	-	899	33	932
	New Zealand	-	147	4	151	-	130	4	135	-	125	5	129
	Others	-	4	0	4	-	5	0	5	-	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)

	2023			2024			2025		
	PAC	VRF	Total	PAC	VRF	Total	PAC	VRF	Total
World total	15,112	2,963	18,075	15,379	2,746	18,124	15,710	2,512	18,222
Japan	660	146	805	684	149	833	720	148	868
Outside Japan	14,452	2,817	17,270	14,694	2,597	17,292	14,990	2,364	17,354
China	1,841	2,159	4,001	1,772	1,875	3,647	1,612	1,602	3,213
Asia total	1,416	270	1,686	1,514	298	1,812	1,543	309	1,851
India	226	65	291	235	79	314	268	84	352
Indonesia	60	10	70	63	11	73	61	11	72
Vietnam	67	12	79	70	13	84	74	16	90
Thailand	167	11	178	172	11	183	173	12	184
Taiwan	63	18	80	66	18	85	49	17	66
Malaysia	72	6	78	76	6	82	77	6	83
Hong Kong/Macau	17	9	26	17	8	26	21	11	32
Bangladesh	43	2	45	55	2	57	55	2	57
Philippines	62	9	71	67	10	77	73	11	84
Singapore	17	7	23	17	8	25	16	8	24
Others	622	121	743	675	131	806	676	131	807
Middle East total	500	33	533	586	49	635	636	55	691
Saudi Arabia	149	7	156	170	9	179	181	13	193
Israel	-	-	0	54	8	-	57	9	66
UAE	153	12	165	166	13	179	177	15	192
Oman	48	3	52	53	3	56	56	4	59
Qatar	26	3	30	28	3	31	29	3	33
Kuwait	49	1	50	-	-	0	-	-	-
Bahrain	-	-	0	-	-	-	-	-	-
Lebanon	-	-	0	2	1	-	-	-	-
Others	73	7	80	114	11	125	136	12	148
Europe total	650	197	847	633	201	834	664	206	870
Italy	40	30	70	42	31	74	42	35	77
Spain	184	17	201	183	19	202	202	21	223
Turkey	31	32	63	30	32	62	25	29	54
France	95	33	128	83	34	117	78	34	112
Greece	15	5	19	14	4	18	12	4	16
Portugal	17	5	22	21	5	25	25	6	31
Poland	16	5	21	15	6	21	15	6	21
United Kingdom	66	17	83	61	15	77	67	16	83
Germany	29	12	41	31	13	44	40	13	53
Netherlands	13	3	16	13	3	16	14	3	18
Bulgaria	2	3	5	2	2	4	2	1	3
Romania	8	2	10	6	2	7	-	-	-
Belgium	11	3	14	12	3	15	12	3	15
Hungary	2	2	4	2	2	3	4	2	6
Norway	3	0	3	2	0	3	3	-	3
Sweden	4	0	4	3	0	4	3	-	3
Finland	2	0	2	1	0	2	1	-	1
Czech Republic	5	1	6	6	2	8	7	2	9
Austria	5	2	7	6	2	8	5	2	7
Denmark	1	0	1	1	0	1	1	-	1
Switzerland	5	1	6	6	1	6	5	1	6
Ireland	6	1	7	5	1	6	5	1	6
Others	91	23	114	88	24	112	98	26	124
North America total	9,100	62	9,162	9,186	68	9,254	9,451	77	9,528
USA	-	-	0	8,945	62	9,007	9,186	69	9,255
Canada	-	-	0	241	6	247	265	8	273
Latin America total	384	42	426	396	44	440	401	45	446
Africa total	333	28	361	348	30	378	399	35	434
Oceania total	228	27	255	260	31	291	285	35	320
Australia	204	25	229	234	29	263	258	32	290
New Zealand	23	2	25	25	3	27	26	4	30
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.

Region by Demand Conditioner Air World

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