



Italy Air Conditioning 2005

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Italy Air Conditioning Report

The report describes the commercial structure of the Italian residential and light commercial air conditioning market, providing an in depth insight into the developments in 2004:

- Trends (volume) 1993-2004 & forecasts to 2009
- Market value & average prices in 2004
- Technical segmentations
- Market shares by supplier
- Distribution of air conditioning & heating products.

The product scope covers direct expansion air conditioners: window room, portable, split (mono and multi), variable refrigerant flow (VRF), and rooftop.

Italy Background

At the end of 2004 Italy had around 57.2 million inhabitants. The Italian economy has in recent years been one of the worst performers in the Euro zone. The situation looks bleak with falling industrial production, stagnating retail sales and a negative trade balance. Domestic demand is falling and the rate of private consumption, which is already low, is expected to fall further.

Market Developments

The market is dominated by split system air conditioners, and mono-split units in particular. Italy is easily the largest air conditioning market in Europe, accounting for one in four of all conditioners sold in Europe. The market for VRF air conditioners is growing fast.

Consumer perception of air conditioning has changed in recent years, from that of a luxury product to a mass-market appliance increasingly penetrating the residential sector. The reasons are varied: better affordability, wider choice and climate are all key contributors to this changing attitude.

The market is maturing quickly: a substantial RMI market has evolved and an informed average consumer is looking increasingly at quality, efficiency and added comfort features rather than unit price alone. The market has sustained a high rate of growth over the past decade, most notably in the years 1999, 2003 and 2004.

The growing penetration of Asian-manufactured goods, first from Japan and more recently from China and Korea, has made accessible the latest technology and comfort features to a large consumer base, with a wide range of products to choose from at affordable prices. The leading suppliers of split system air conditioners to the Italian market include: DAIKIN, MITSUBISHI and LG.

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