



Spain Air Conditioning 2005

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Base Year: 2004

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Spain Air Conditioning Report

The report describes the commercial structure of the Spanish 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.

Spain Background

At the end of 2004 Spain had around 43.2 million inhabitants, with a highly dispersed geography and low population density. The Spanish economy is growing faster than average for the Euro zone. Healthy GDP growth, which has picked up in the past couple of years, is being sustained by high levels of domestic demand and private consumption. A strong housing industry and increasing business investment are key drivers of economic growth.

Total construction output accounted for more than 18% of Spain's GDP in 2004, with overall investments in excess of €140bn. More than half a million new dwellings are completed annually; new housing is a key sector of demand sustained by an increasingly wealthy average Spanish household.

Market Developments

The market is dominated by split system air conditioners, and mono-split units in particular. Spain is the second largest air conditioning market in Europe after Italy.

The air conditioning market in Spain has evolved from a small, luxury product market serving mostly non-housing demand to a fast-growing market which now caters to demand from the residential, commercial, and industrial sectors. The market has sustained a high rate of growth over the past decade, most notably in the years 2003 and 2004, and is beginning to show signs of maturity with more discerning consumers. Average prices, which have fallen considerably over the past decade largely as a result of increased supply from low cost producer countries, are beginning to stabilise.

The growing penetration of Asian-manufactured goods, first from Japan and more recently from China and Korea, has had a significant impact on the market, making air conditioning products affordable and accessible to a much wider audience than merely the wealthiest of households. The leading suppliers to the Spanish market include: FUJITSU, LG, MITSUBISHI, DAIKIN and PANASONIC.

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