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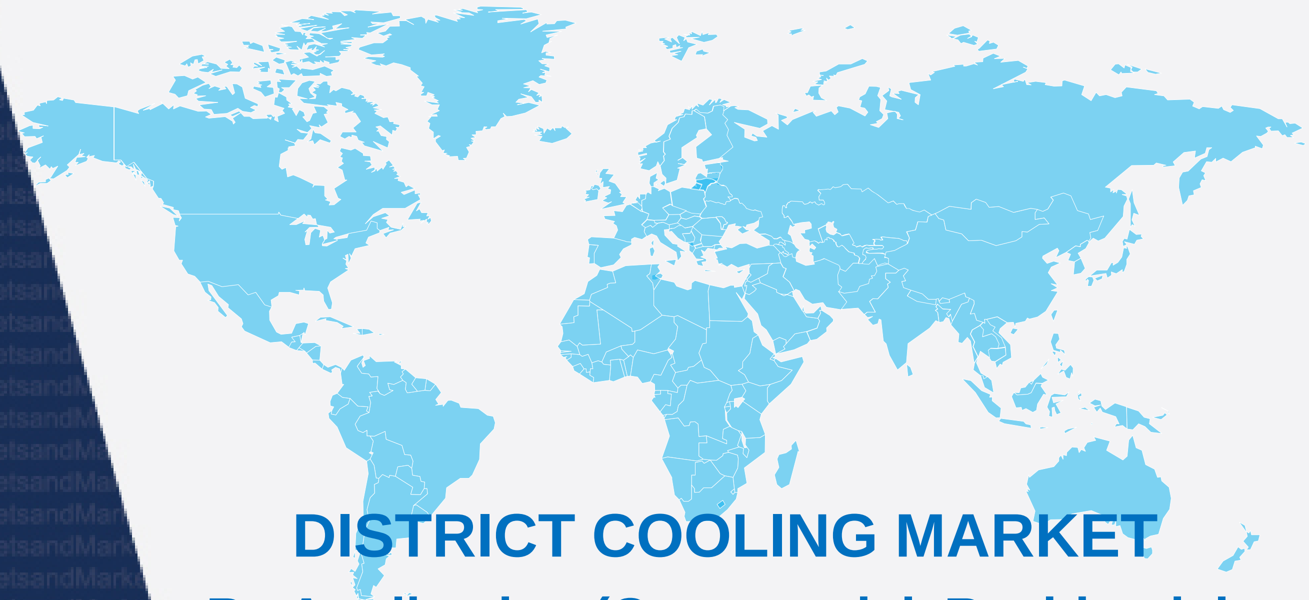

DISTRICT COOLING MARKET

By Application (Commercial, Residential, Industrial, & Others)

– Global Trend & Forecast to 2012–2019

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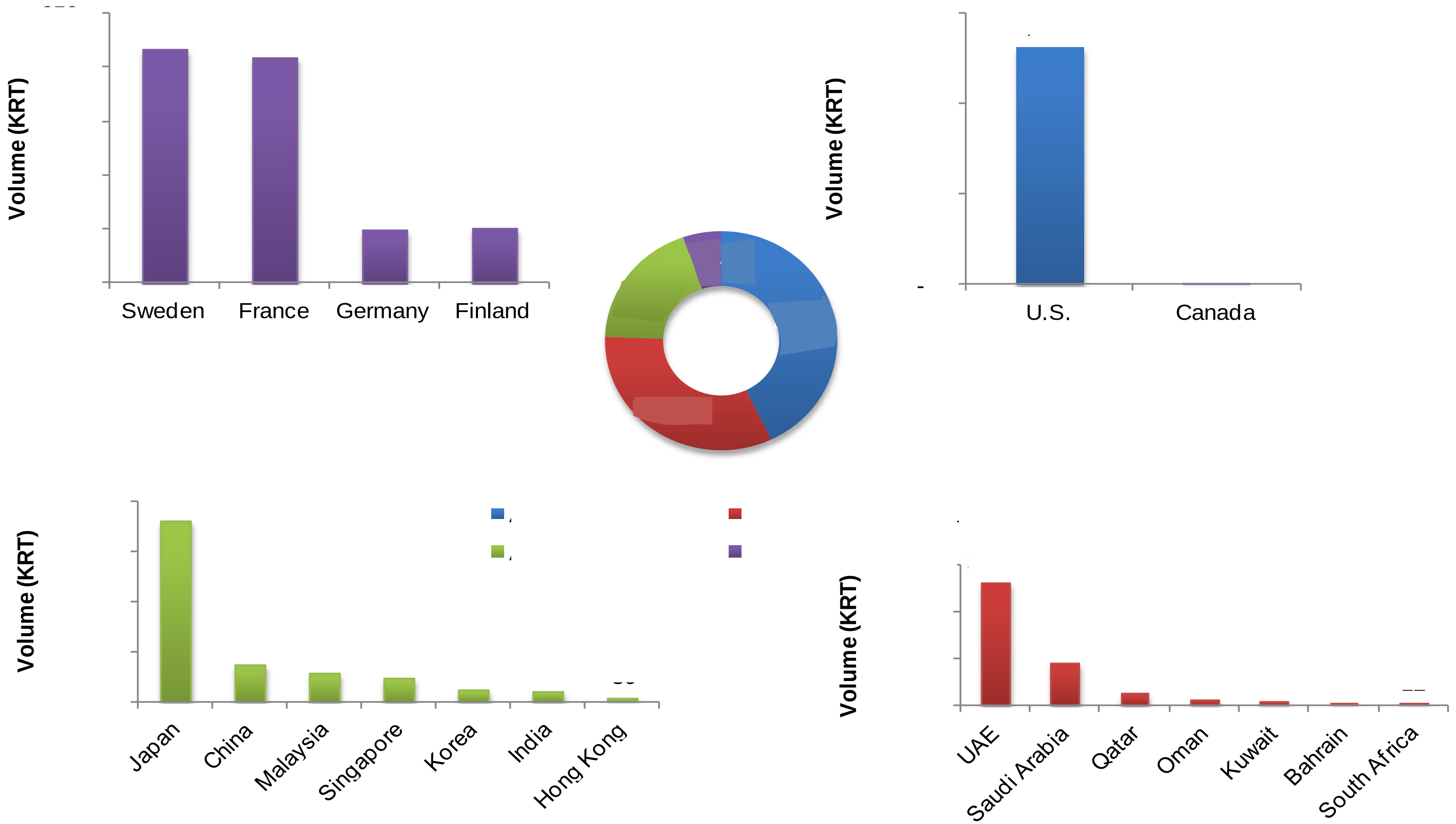
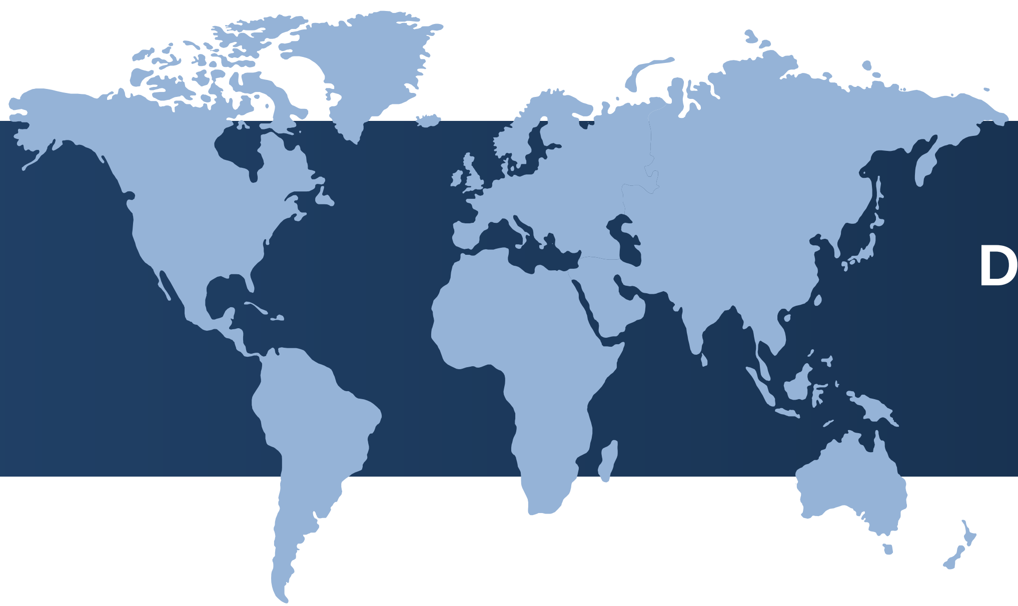
DISTRICT COOLING MARKET – PREMIUM INSIGHTS

3.6 District Cooling Market Size (Volume), By Region & Country, 2014

Figure 7 District Cooling Market Size (Volume), By Region & Country, 2014

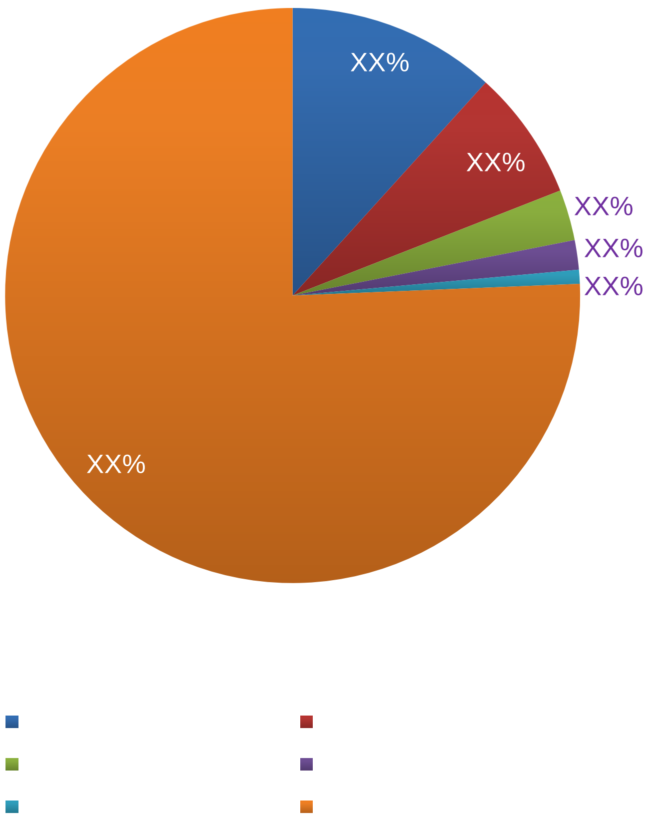




DISTRICT COOLING MARKET – MARKET OVERVIEW

4.7 Market Share Analysis – By Company

Figure 15 District Cooling Market Share (Volume), By Company, 2013



Insights

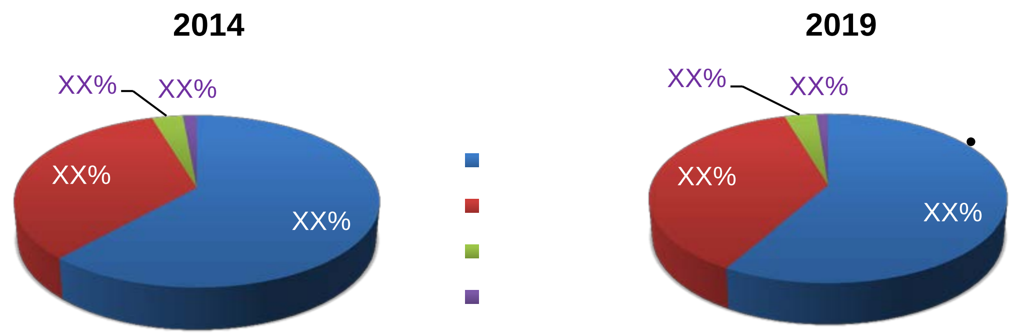
- The overall district cooling capacity was estimated to be XX KRT in 2013, and is expected to register a CAGR of XX% between 2014 and 2019
- Emirates Central Cooling Systems Corporation (EMPOWER) and National Central Cooling Company PJSC (Tabreed) are the two major players in the district cooling industry, together accounting for nearly XX% share of the overall district cooling market
- Empower acquired Palm District Cooling (PDC) in the beginning of 2014, thereby increasing its district cooling capacity to more than 1 million RT
- The major district cooling market is concentrated in the GCC region with the market share of companies summing up to nearly XX% of the global capacity in 2013

Source: EUROHEAT & POWER, IDEA, Factiva, Company Websites & Presentations, Company Press Releases, Expert Interviews, and MarketsandMarkets Analysis

DISTRICT COOLING MARKET – BY APPLICATION

5.3 District cooling services are majorly consumed by the commercial segment; a trend which will continue in the future

Figure 17 District Cooling Market Share (Volume), By Application, 2014-2019



District cooling is majorly deployed for the commercial sector as it accounts for major share of power and cooling requirements during peak hours for any nation. As a result, using district cooling is beneficial in lowering the power demand curve during peak hours. It will lead to national power grid security, lesser addition of power generation capacity, and simultaneously meeting cooling demand and carbon emissions requirements.

Table 11 District Cooling Market Size, By Application, 2012-2019 (KRT)

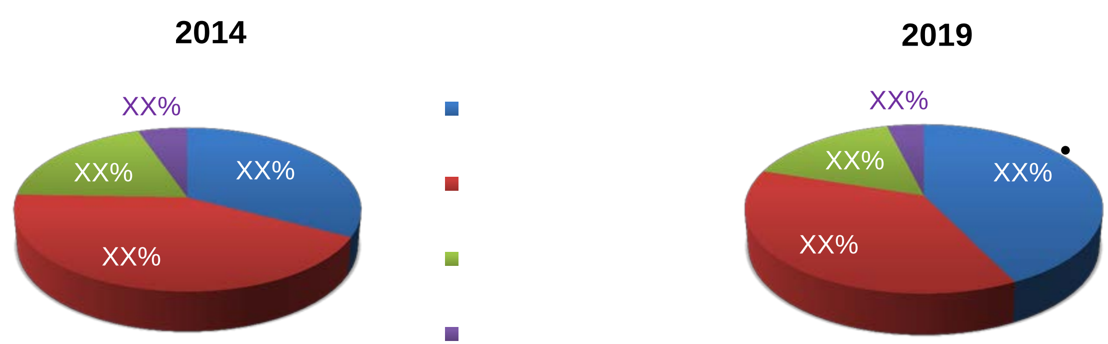
Application	2012	2013	2014	2019	CAGR % (2014-2019)
Commercial	XX	XX	XX	XX	XX
Residential	XX	XX	XX	XX	XX
Industrial	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: EUROHEAT & POWER, IDEA, Factiva, Company Websites & Presentations, Company Press Releases, Expert Interviews, and MarketsandMarkets Analysis

DISTRICT COOLING MARKET – BY GEOGRAPHY

6.3 Middle East & Africa to be the leading destination for the DC market by 2019

Figure 28 District Cooling Market Share (Volume), By Region, 2014-2019



- In 2013, the Americas led the district cooling market with a share of XX%, which is projected to be overtaken by the Middle East & Africa (MEA) by 2019 with a share of XX%
- This paradigm shift is due to the rapid growth of real estate and commercial sectors in the MEA region along with rapid increase in cooling and peak power requirements. Therefore, district cooling is the viable option in terms of efficiency and environmental safeguard.

Table 21 District Cooling Market Size, By Region, 2012-2019 (KRT)

Region	2012	2013	2014	2019	CAGR % (2014-2019)
Americas	XX	XX	XX	XX	XX
Middle East & Africa	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: EUROHEAT & POWER, IDEA, Factiva, Company Websites & Presentations, Company Press Releases, Expert Interviews, and MarketsandMarkets Analysis

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