The French Heat Pump Market at a Glance

Products market structure and regulatory context

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Purpose and scope

Consolidation in distribution and the development of integrated offers are changing how heat pumps reach French customers. Manufacturers considering entry face a market where equipment is increasingly offered alongside installation, financing and technical support. [3, 10]

I have prepared this brief overview to support manufacturers considering entry into France, outlining the market conditions, distribution channels and regulatory requirements that should inform their assessment.

This snapshot focuses on residential air-to-air and air-to-water heat pumps in metropolitan France. Geothermal systems dedicated domestic-hot-water heat pumps, and large collective or industrial applications are outside its scope.

Products and demand drivers

Air-to-water demand is closely connected to new housing and the replacement of existing heating systems. Construction activity, renovation incentives and household investment capacity are therefore key indicators.

Air-to-air demand also benefits from cooling needs, making summer temperatures and consumer demand for thermal comfort important drivers.

These different relationships with construction, renovation and seasonal demand affect the market outlook and commercial approach for each segment. [1, 2]

Market situation

The competitive field includes domestic groups, European boiler manufacturers, Japanese HVAC specialists, Korean suppliers and Chinese manufacturers or OEM platforms. Brand origin alone is an incomplete guide to ownership or production footprint: Bosch's acquisition of Johnson Controls and Hitachi HVAC activities illustrates this distinction. [11]

Segment	2025 units	Change on 2024	Share of these two segments
Air-to-air	759,500	+0.2%	80.7%
Air-to-water	181,750	+0.6%	19.3%

Source: Observ'ER, 2026 study of the 2025 individual market. Shares calculated from the combined 941,250 units in these two segments; they represent unit volumes, not market value or brand shares. [1]

Market direction and distribution

Recovery signals require context

Uniclima reported H1 2026 manufacturer sales of 101,330 air-to-water units, up 14.7% year on year, and 602,514 small air-to-air outdoor units below 17.5 kW, up 36.2%. These are sell-in figures, covering sales to distributors and direct installer customers, rather than completed installations. [2]

They should be read separately from the full-year Observ'ER estimates. Distributor stock movements and early heatwaves influenced the air-to-air rebound. The evidence indicates renewed activity, with different drivers across the two segments; it does not establish a sustained national growth rate. [2]

The same industry assessment describes a fragile building market, with fewer than 300,000 housing starts expected in 2026. Construction and renovation therefore remain priority indicators when assessing the durability of air-to-water demand. [2]

Professional distribution

Professional wholesale is a central route to installers, combining local availability, compatible accessories and technical assistance. Examples include CEDEO and Clim+, Téréva, Richardson and specialist HVAC networks.

A concrete example of channel consolidation is Sonepar's combination of CD SUD, 3C CLIM and HYDECLIM, brought together under the Sonepar Climate identity in January 2026. Its offer combines equipment, accessories, logistics and support from project selection through commissioning and after-sales. [3]

The commercial implication is that wider distribution can increase the support expected from the supplier. A national listing can require service capability across the territories covered. The allocation of stock, technical support, training and warranty responsibilities must therefore be examined alongside purchasing terms.

DIY and consumer retail

DIY retailers adapt their commercial approach to the product category. Air-to-air offers tend to emphasise product choice, price and comfort, with installation services available alongside the equipment.

For air-to-water, the approach is more project-based, combining technical assessment, qualified installation, access to incentives and financing. The retailer acts as a coordinator of the installation process. [4, 5]

Regulatory and incentive framework

Legal marketability and incentive eligibility require separate assessments. The following provisions materially affect product selection and the customer proposition.

Financial incentives

The September 2026 Anah guide provides MaPrimeRénov' grants of EUR 5,000, EUR 4,000 and EUR 3,000 for individual air-to-water measures for very modest, modest and intermediate-income households respectively. Higher-income households are excluded. Air-to-air is excluded from this pathway, but qualifying systems can receive standard CEE support. Project and installer eligibility conditions apply. [6]

The CEE (energy savings certificates) Coup de pouce heating scheme supports eligible replacement of fossil-fuel boilers. For qualifying air-to-water operations, the CEE volume is multiplied by five. The cash payment depends on the counterparty and applicable conditions. [7]

European assembly and model approval

For enhanced CEE support, model approval since 1 September 2026 combines recognised certification with assembly criteria in the European Economic Area (EEA). Monobloc units require final assembly of the refrigerant circuit in the EEA; split units require final assembly of at least one refrigerant-circuit subassembly there. The live register and applicable scheme rules control eligibility. [9]

An EU assembly site outside France can address the industrial criterion. Eligibility remains specific to the qualifying operation, certification and exact models.

Refrigerant transition

Equipment category	Selected placing on the market restriction
Split air-to-water up to 12 kW	From 1 January 2027: fluorinated greenhouse gases with GWP of 150 or more.
Self-contained equipment up to 12 kW	From 1 January 2027: fluorinated greenhouse gases with GWP of 150 or more.
Split air-to-air up to 12 kW	From 1 January 2029: fluorinated greenhouse gases with GWP of 150 or more.

Selected milestones under Regulation EU 2024/573, subject to safety exceptions and detailed scope. These restrict placing equipment on the market, not operation of existing installations. GWP means global warming potential. [8]

Integrated offers and announced changes

The integrated air-to-water offer launched in October 2026 combines equipment, installation, three years of maintenance, consumption controls and financing for eligible lower-income homeowners. Fixed-price electricity for three years is optional. [10]

The Government has announced simplification of the MaPrimeRénov' and CEE customer pathway from January 2027. Implementing provisions require verification before incorporation into a launch plan. [12]

Implications for market entry

Consolidation in distribution and more integrated offers suggest that manufacturers entering France will be assessed on their ability to support installations alongside product performance and price. After-sales provides a first operational test: technical support, spare parts and field intervention must match the intended products, territory and scale. The entry model should therefore reflect who can undertake these responsibilities and at what cost. This applies whether the manufacturer establishes European assembly or enters through a dealer.

Sources and reading notes

Evidence reviewed to 13 November 2026. Figures retain their original periods and scopes. Commercial implications are the author's interpretation of the cited evidence. Incentive rules, model eligibility and announced measures should be checked against the applicable texts at the time of a project decision.

[1] Observ'ER Market and prices of individual heat pumps in 2025, published May 2026. Sales baseline and technology context.

[2] Uniclima via FPA H1 2026 climate-engineering market review. Sell-in data, stock effects and construction outlook. Supplementary reading on demand conditions.

[3] Sonepar Climate CD SUD, 3C CLIM and HYDECLIM become Sonepar Climate, 8 January 2026.

[4] Castorama Air-to-air heat-pump installation services. Retail service example, accessed November 2026.

[5] Leroy Merlin Air-to-water installation and commissioning service. Retail service example, accessed November 2026.

[6] Anah Financial assistance guide, September 2026 edition. Individual-measure grants, air-to-air treatment and qualification conditions.

[7] Ministry for Ecological Transition Coup de pouce Chauffage. CEE replacement conditions and coefficients.

[8] European Commission Climate-friendly alternatives for air conditioning and heat pumps. Summary of restrictions under Regulation EU 2024/573, Annex IV.

[9] ADEME Heat-pump model approval for quality and industrial resilience. Criteria, live register and links to the governing texts.

[10] Ministry of Economy Launch of the integrated heat-pump offer, 1 October 2026.

[11] Bosch Home Comfort Completion of the Johnson Controls and Hitachi HVAC acquisition, 1 August 2025.

[12] Ministry of Economy Second phase of the electrification plan, 15 October 2026. Announced 2027 support simplification.

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