HVAC Equipment

US Industry Study with Forecasts for **2011 & 2016**

Study #2259 | November 2007 | $4500 | 299 pages

The Freedonia Group
767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

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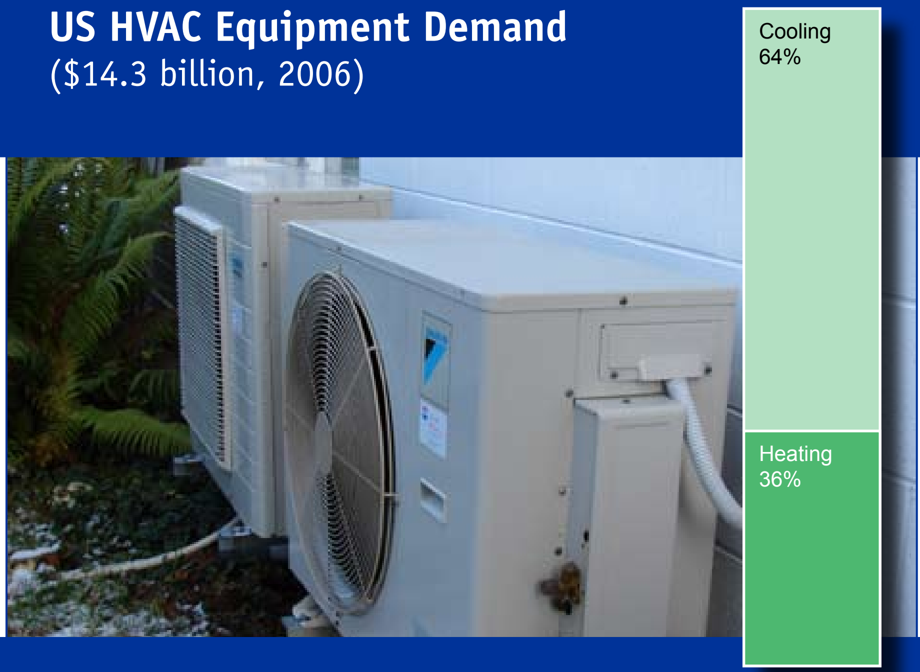
Growth in the dominant replacement sector will benefit from demand for newer, more efficient HVAC units in response to rising energy prices and government subsidies and mandates.

US demand to grow 3.2% annually through 2011

Demand in the US for heating, ventilation and air conditioning (HVAC) equipment is forecast to increase 3.2 percent per year to $16.8 billion in 2011. Advances will be primarily driven by strong gains in new nonresidential construction, along with ongoing growth in the residential replacement market. Although gains will be restrained by declines in new single unit housing completions between 2006 and 2011, nearly three-quarters of HVAC demand is attributable to replacements. Growth in the replacement sector will benefit from interest in more energy efficient building systems driven by rising energy prices, spurring the replacement of older HVAC equipment with newer models. Rebates and tax incentives will also encourage owners to replace older, less efficient units. Changing federal regulations regarding minimum efficiency requirements for many of these systems will also affect sales of HVAC equipment.

US HVAC Equipment Demand
($14.3 billion, 2006)



Unitary air conditioners to remain largest cooling equipment segment

Unitary air conditioners will remain the largest segment in the cooling equipment industry, accounting for more than 70 percent of total demand in 2011. Absorptive liquid chilling systems are expected to post the strongest gains through 2011 as industrial and commercial construction rebounds over the forecast period. Packaged terminal air conditioner sales will achieve above average gains because of a rebound in lodging construction expenditures. Room air conditioners will also post above average sales as quieter and more efficient units become available. The cooling equipment industry is affected by a variety of regulations, including those involving refrigerants. In the US, the production of systems using chlorofluorocarbons has been banned, and hydrochlorofluorocarbons are due to be completely phased out by 2030. As a result, the chlorine-free refrigerant HFC-410A is being phased in across a variety of price points by most manufacturers.

Heat pumps to lead gains among heating equipment

In 2006, heat pumps surpassed warm air furnaces as the largest heating equipment segment and will account for 47 percent in 2011. Heat pumps are also expected to post the strongest gains through 2011 based on the ability of these units to provide efficient heating and cooling in moderate climates and to serve as a low cost supplementary heat source in colder climates. While warm air furnaces will remain the second largest segment through 2011, they are expected to lose market share over the period. Warm air furnace sales will be supported by their relatively low initial cost.

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Sample Text, Table & Chart

TABLE V-3

UNITARY AIR CONDITIONER SUPPLY & DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Building Construction Expend (bil $)					
$ unitary AC/000$ construction					
Unitary Air Conditioner Demand					
+ net exports					
Unitary Air Conditioner Shipments					
$/unit					
Unitary AC Shipments (000 units)					
% unitary air conditioners					
Cooling Equipment Shpts (000 units)					

SAMPLE TABLE

HEATING EQUIPMENT

Supply & Demand

Sales of room and zone heating equipment are projected to increase ... million in 2011. Advances will be aided ... struction spending. In the nonresidential ... led to handle large, open areas, such as ... argo entrances, that would put too much of ... tems if the areas depended on the central ... ojected recovery of the new nonresidential ... forecast period, particularly in the industrial segment, will boost demand for these types of heating equipment. Additionally, as a growing number of homeowners are using their garages as home gyms and hobby areas, room and zone heaters are being purchased and installed to warm these previously unheated spaces.

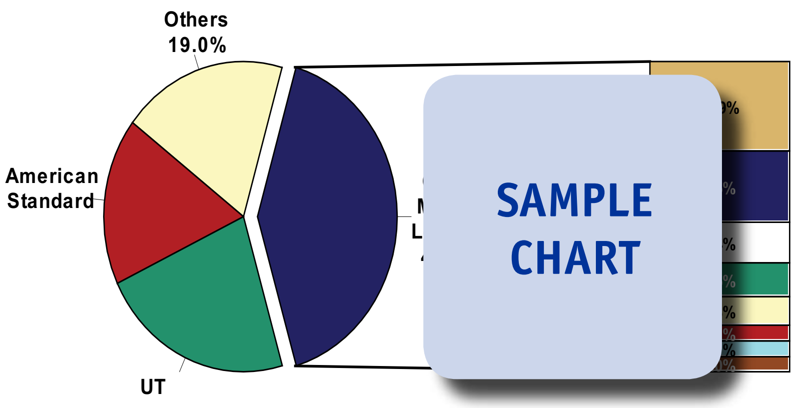
SAMPLE TEXT

Further gains will be restrained by competition with central heating systems and portable space heaters. Historically, room and zone heating equipment has been used for new additions and zone heating, but there is still a general preference for incorporating better designed central heating equipment. Some building owners prefer to use a separate thermostat on the central system for areas with different heating requirements, or in some cases, use small portable space heaters for rooms that are difficult to warm or are used less often. Additionally, the traditional use of room and zone heating in new residential additions will be hampered by a sharp projected deceleration in spending on improvements to housing structures over the forecast period.

... of room and zone heating equipment are projected to ... million in 2011. Declines are due in part to competi... ost suppliers that produce the equipment outside the US ... owth of a domestic industry in some of the key export ... urther declines will be slowed by a couple of factors. For ... and zone heating equipment has greater export potential

CHART VII-1

US HVAC EQUIPMENT MARKET SHARE, 2006
($14.3 billion)



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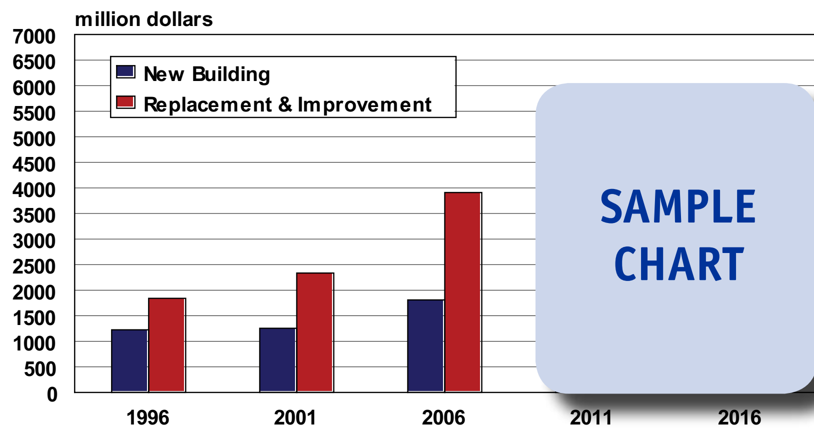
Sample Profile, Chart & Forecast

CHART VI-2

RESIDENTIAL HVAC EQUIPMENT DEMAND BY MARKET



COMPANY PROFILES

Bradford White Corporation
725 Talamore Drive
Ambler, PA 19002
215-641-9400
http://www.bradfordwhite.com

Annual Sales:
Employment:

Key Products: water and space heating s

SAMPLE PROFILE

Bradford heating equipment, primaril water heating products for th rm operates an 800,000-square-foot manufacturing facility in Middleville, Michigan.

The Company's is active in the US HVAC equipment industry through the manufacture and sale of water heaters, combination domestic hot water and space heating systems, air handlers and hydronic boilers. Bradford White also makes HVAC equipment via the LAARS Heating Systems Company subsidiary (Rochester, New Hampshire).

Bradford White's range of heating equipment includes BRADFORD WHITE hydronic and space heating residential water heaters, which are specifically engineered to heat both air and water. These units, which are available in side-connect and coil designs, all feature side connections for space heating. Among the Company's residential water heaters that can be used for hydronic space heating applications are DEFENDER SAFETY SYSTEM gas-powered line, COMBICOR oil- powered line, gas-powered Direct Vent Energy Saver, and POWER

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New Building

"Sales of HVAC equipment to the residential new building market are forecast to advance less than one-half of one percent per year to $1.8 billion in 2011. This trend is the result of a projected decline in the number of single-unit housing completions between 2006 and 2011 from the elevated base of 2006. This will be countered to some extent by a recovery in the number of multiple unit homes completed and the number of manufactured housing units shipped."
--Section VI, pg. 168

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Other Studies

World Major Household Appliances

This study forecasts the world market for household appliances. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by type (refrigerators and freezers, clothes washers and dryers, cooking appliances, dishwashers); world region (e.g., North America, Asia/Pacific, Western Europe); and for over twenty countries. The study also considers economic trends and other factors impacting demand, details industry structure, evaluates market share and profiles major producers.

#2279 .... 01/2008..................... $5800

World Water Treatment Products

World demand for water treatment products will be influenced by stricter water quality laws, greater emphasis on water treatment in developing nations, improvements on water treatment methods and continued expansion in industrial activity and population. This study examines the global market for chemical and nonchemical water treatment products, with forecasts for 2011 and 2016 by product, market, world region and major country. The study also evaluates market share and profiles industry competitors.

#2276 .... 12/2007..................... $5800

Filters in China

This study analyzes the Chinese market for filters. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by product type (e.g., internal combustion engine and related filters, fluid filters, air filters); and by market (e.g., transportation equipments, industrial and manufacturing, utilities, consumer). The study also considers market environment factors, reviews filtration technology, details industry structure, evaluates company market share and profiles leading competitors.

#2278 .... 11/2007..................... $4900

Outdoor Furniture & Grills

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as “cocooning” and “outdoor rooms”. Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the $6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2221 .... 09/2007..................... $4400

Filters

US filters demand will grow 4.2% yearly through 2011. Gains will be driven by ongoing sales in the dominant aftermarket, pending laws for cleaner air and reduced emissions, as well as increasing penetration of motor vehicle cabin air filters and home air and water filters. Fluid filters will remain the largest segment while air filters will grow the fastest. This study analyzes the $9.8 billion US filter industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading competitors.

#2164 .... 04/2007..................... $4500

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