

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

Summary

The top 25% of efficient central air conditioning (CAC) models can bear the “ENERGY STAR” label, and, to be eligible, they have to have a minimum SEER level of 14. In addition, the minimum Energy Efficiency Ratio (EER) levels for Energy Star® split system models must be 11.5 and for Energy Star® single-package models must be 11.0. Air conditioners bearing the Energy Star® label can be two time more efficient than some existing units. Consumption of energy by the current range of air conditioners is 30%-50% lower than air conditioners of the 1970s for producing the same amount of cooling.

Central Air Conditioning product segments analyzed in this study include Direct Expansion (DX) Central Air Conditioning Systems and Central Plant/Chilled Water Central Air Conditioning Systems (Central Plant AC Systems) also referred as Applied Systems. The report also analyzes the market of the sub-segments of DX Systems – Split AC Systems (greater than 8 kW of cooling capacity), Packaged AC Systems and Heat Pumps; and Central Plant AC Systems – Chillers, Cooling Towers, Air Handling Units and Fan Coil Units.

In terms of unit shipments, Central Air Conditioners in the US are estimated at 4.5 million units in 2010, valued at US\$ 9.22 billion. Though unit shipments are forecast to exhibit low CAGR of 1.70% over the 2006-2015 analysis period, shipment value is expected to maintain high CAGR of 5.02% during the same period. This can be attributed to changes in unit prices that vary from year to year, dependent on demand and new technologies. The market for 2011 is expected to touch 4.8 million units valued at US\$ 9.7 billion.

The market report includes the complete competitive landscape for CAC market in the United States which comprises market share analysis (2009) for leading market players including Carrier, Goodman, Lennox, McQuay, Nordyne, Rheem, Trane and York. The study analyses these major players with respect to key financials, product listing & analysis, key brands, competitors and production plant locations & capacities. The report also briefly profiles 50 other key market players in the United States.

This 198 page United States market report includes 36 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the US CAC unit shipments and value of shipments by product segments, sub-segments and by the cooling capacity (Btuh).

For More information <http://industry-experts.com/verticals/manufacturing/central-air-conditioning-systems-a-us-market-overview.html>

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

TABLE OF CONTENTS

1. INTRODUCTION

2. PRODUCT SEGMENTATION

- 2.1 Central Air Conditioning Systems
 - 2.1.1 Direct Expansion (DX) Central Air Conditioning Systems
 - 2.1.1.1 Components of DX Central Air Conditioning Systems
 - Evaporator
 - Compressor
 - Expansion Valve
 - 2.1.1.2 DX AC Systems Equipment Type
 - 2.1.1.2.1 Packaged Central Air Conditioning Systems
 - 2.1.1.2.2 Split System Central Air Conditioning Systems
 - Ductless Multi-Split Systems
 - 2.1.1.2.3 Heat Pumps
 - 2.1.1.2.3.1 Air Source Heat Pumps
 - 2.1.1.2.3.2 Ground Source Heat Pumps
 - 2.1.1.2.3.3 Direct Geoexchange Heat Pumps
 - 2.1.1.2.3.4 Water Source Heat Pumps
 - 2.1.2 Central Plant/Chilled Water Central Air Conditioning Systems
 - 2.1.2.1 Components of Central Plant/Chilled Water Air Conditioning Systems
 - 2.1.2.1.1 Chillers (Central Plant)
 - 2.1.2.1.2 Air Handling Units or Fan Coil Units
 - 2.1.2.1.3 Air Ducts
 - 2.1.2.1.4 Cooling Tower
 - 2.1.2.2 Central Plant AC Systems Equipment Types
 - 2.1.2.2.1 Chillers
 - 2.1.2.2.1.1 Reciprocating Chillers
 - 2.1.2.2.1.2 Screw Chillers
 - 2.1.2.2.1.3 Centrifugal Chillers
 - 2.1.2.2.1.4 Absorption Chillers
 - 2.1.2.2.2 Cooling Towers
 - 2.1.2.2.3 Air Handling Units
 - Draw-Through Units
 - Blow-Through Units
 - 2.1.2.2.4 Fan Coil Units
 - Horizontal Units
 - Vertical Units
 - Vertical Stack Units

3. ENERGY EFFICIENCY STANDARDS

- 3.1 Why Is Energy Efficiency Required?
- 3.2 High-Efficiency Improvements in Air Conditioners
- 3.3 Benefits of Energy Efficiency
- 3.4 Cost Comparison of Standard and ENERGY STAR Qualified Central Air Conditioners
- 3.5 Energy Efficiency Ratings for Air conditioners in the United States of America
 - 3.5.1 US – ENERGY STAR Program
 - 3.5.2 Important Definitions

- 3.5.2.1 Coefficient of Performance (COP) – Cooling
- 3.5.2.2 Coefficient of Performance (COP), Heat Pump – Heating
- 3.5.2.3 Energy Efficiency Ratio (EER)
- 3.5.2.4 Heat Seasonal Performance Factor (HSPF)
- 3.5.2.5 Integrated Part-Load Value (IPLV)
- 3.5.2.6 Seasonal Energy Efficiency Ratio (SEER)
- 3.5.3 Efficiency Ratings for Residential Central Air Conditioning Systems
- 3.5.4 Efficiency Ratings for Commercial Central Air Conditioning Systems

4. KEY MARKET TRENDS

- 4.1 Underfloor Air Distribution (UFAD) Systems Shows Slower Growth in Recent Past
 - 4.1.1 Descriptive Analysis of UFAD Systems
 - 4.1.2 Advantages Offered
 - 4.1.3 Shortcomings
- 4.2 Global Building Market Adopting “Green Technology”
- 4.3 Chilled Beams Gaining Ground in the US
 - 4.3.1 Description of Chilled Beams
 - 4.3.2 Operational Process
 - 4.3.3 Advantages of Chilled Beams
 - 4.3.4 Disadvantages of Chilled Beams
 - 4.3.5 Cost Factors
- 4.4 VRF/VRV Systems Lucrative in the US
 - 4.4.1 Description of VRF Systems
 - 4.4.2 Advantages of VRF Systems
- 4.5 Solar Air Conditioning Systems
- 4.6 Air Conditioners with Non-Ozone Depleting Refrigerants
 - 4.6.1 Kyoto Protocol
 - 4.6.2 Phase Out Affect on AC Systems
- 4.7 Trends and Developments in the Usage of Natural Refrigerants
 - 4.7.1 Natural Refrigerants
 - 4.7.1.1 Ammonia (NH3)
 - 4.7.1.2 Carbon dioxide (CO2)
 - 4.7.1.3 Hydrocarbons
 - 4.7.1.4 Water refrigeration Offers Substantial Potential Savings
 - 4.7.1.5 Fast and Lower Energy costs using Air Refrigeration
- 4.8 EPA Energy Star Qualified New Homes Program Version 3 to be Effective from January 1, 2012
- 4.9 R441a Hydrocarbon Refrigerant Debuts in the US
- 4.10 US DOE to Assist in Developing High-Efficiency Commercial Air Conditioners
- 4.11 Federal Tax Credits for Consumer Energy Efficiency for the Coming Year Not So Sweet

5. COMPETITIVE LANDSCAPE

- 5.1 Market Share Analysis for Major Players in the United States

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

5.2 Major Player Profiles

5.2.1 CARRIER CORPORATION

Key Figures
Key People
Business Description
United Technologies Corporation (Parent)
Brand Names
Product Listing
Product Analysis
Competitors
Major Projects
Manufacturing Locations and Production Capacity

5.2.2 GOODMAN GLOBAL, INC

Key Figures
Key People
Business Description
Trade Names
Product Listing
Analysis of Select Products
Major Competitors
Manufacturing Locations and Production Capacity

5.2.3 LENNOX INTERNATIONAL INC.

Key Figures
Business Description
Brand Names
Product Analysis
Major Competitors
Major Projects
Manufacturing Locations and Production Capacity

5.2.4 MCQUAY INTERNATIONAL

Key Figures
Key People
Business Description
Daikin AC Americas, Inc (Parent)
Brand Names
Product Listing
Product Analysis
Competitors
Major Projects
Manufacturing Locations and Production Capacity

5.2.5 NORDYNE INC.

Key Figures
Key People
Business Description
Nortek Incorporated (Parent)
Competitors
Product Listing
Brands

Subsidiaries
Manufacturing Locations and Production Capacity

5.2.6 RHEEM MANUFACTURING COMPANY

Key People
Business Description
History
Paloma Co. Ltd. (Parent)
Brands
Product Listing
Brands
Subsidiaries
Major Competitors
Manufacturing Locations and Production Capacity

5.2.7 TRANE INC.

Key Figures
Key People
Business Description
Ingersoll-Rand Plc (Parent)
Brand Names
Product Listing
Product Analysis
Competitors
Major Projects
Manufacturing Locations and Production Capacity

5.2.8 YORK INTERNATIONAL CORPORATION

Key Figures
Business Description
Product Listing
Product Analysis
Johnson Controls (Parent)
Brands
Major Projects
Competitors
Manufacturing Locations and Production Capacity

5.3 Profiles of Other Key Players

5.3.1 AAON, INC.

Key Figures
Key People
Business Description
Product Listing
Major Competitors
Major Projects

5.3.2 ADDISON PRODUCTS

Business Description
Products
Competitors

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

5.3.3 AEROSYS, INC.

Business Description

Products

5.3.4 AIRWELL-FEDDERS NORTH AMERICA, INC

Business Description

Brands

Product Analysis

Major Competitors

5.3.5 ALLIED AIR ENTERPRISES

Business Description

Products

5.3.6 AIRE-FLO HEATING AND COOLING

Business Description

Products

5.3.7 ALLIED ENERGY SYSTEMS

Business Description

Products

5.3.8 AMERICAN STANDARD HEATING & AIR CONDITIONING

Business Description

Products

5.3.9 BARD MANUFACTURING COMPANY, INC.

Business Description

5.3.10 BROAD USA, INC

Business Description

5.3.11 BROAN HEATING AND COOLING (PART OF NORDYNE)

Business Description

5.3.12 BRYANT HEATING AND COOLING SYSTEMS (PART OF CARRIER CORP)

Business Description

5.3.13 CALMAC MANUFACTURING CORP.

Key People

Business Description

5.3.14 COAIRE CORPORATION

Business Description

Products

5.3.15 COLD POINT CORP.

Business Description

Products

Trade Names

5.3.16 THE COLEMAN COMPANY, INC

Business Description

5.3.17 DADANCO US, INC.

Business Description

5.3.18 DUNHAM-BUSH USA

Business Description

5.3.19 E-AIR, LLC (COMFORT STAR)

Business Description

Products

5.3.20 EDWARDS ENGINEERING PRODUCTS (CHILLER SOLUTIONS LLC)

Business Profile

Products

5.3.21 ENVIROMASTER INTERNATIONAL LLC – USA (EMI) (SUBSIDIARY OF ECR)

Business Description

Products

Brands

5.3.22 ESPI TECH, LLC.

Business Description

Products

5.3.23 EVAPCO, INC.

Key People

Business Description

5.3.24 FRIEDRICH AIR CONDITIONING CO.

Business Description

Products

5.3.25 FUJITSU GENERAL AMERICA, INC.

Business Description

5.3.26 HALLOWELL INTERNATIONAL

Business Description

5.3.27 HITACHI AMERICA, LTD.

Business Description

5.3.28 HEAT CONTROLLER, INC.

Key People

Business Description

Products

Brands

5.3.29 INNOVAIR CORPORATION

Key People

Business Description

Products

5.3.30 INTERNATIONAL COMFORT PRODUCTS, LLC (ICP) (PART OF CARRIER CORP)

Key People

Business Description

Brands

5.3.31 KLIMAIRE PRODUCTS, INC.

Key People

Business Description

Products

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

5.3.32 LG ELECTRONICS U.S.A., INC.

Key People

Business Description

5.3.33 LSB INDUSTRIES, INC.

Business Description

Subsidiaries

Climacool Corp

Climatemaster Inc

5.3.34 MAMMOTH, INC.

Business Description

Products

5.3.35 MIDEA USA INC.

Business Description

5.3.36 MITSUBISHI ELECTRIC & ELECTRONICS USA, INC.

Business Description

Products

Competitors

5.3.37 MOTIVAIR CORPORATION

Key People

Business Description

Products

5.3.38 MULTISTACK LLC

Business Description

Products

5.3.39 NATIONAL COMFORT PRODUCTS

Business Description

Products

5.3.40 RAE CORPORATION

Business Description

Products

5.3.41 SANYO NORTH AMERICA CORPORATION

Business Description

Products

5.3.42 SPX COOLING TECHNOLOGIES, INC.

Business Description

Products

5.3.43 TEXAS FURNACE, LLC

Business Description

Products

Brands

5.3.44 THOMAS & BETTS CORPORATION

Key People

Business Description

5.3.45 TURBO-AIR INC

Business Description

5.3.46 UNICO SYSTEM INC

Business Description

Products

5.3.47 UNITED COOLAIR CORP

Business Description

5.3.48 WHIRLPOOL HEATING AND COOLING

Business Description

5.3.49 YAZAKI ENERGY SYSTEMS, INC

Business Description

Competitors

5.3.50 YMG GROUP, LLC

Business Description

Products

6. KEY BUSINESS TRENDS

Carrier's Mexico Factory First HVAC Factory to Receive LEED Gold Certification

"Most Energy-Efficient Heat Pump" Launched by Carrier

Daikin Plans Goodman Global Take Over

Daikin McQuay Research Center Awarded LEED® Gold Certification

Industry's First Commercial HVAC System to be integrated with Solar Power Launched by Lennox

McQuay Showcases 700-Ton Magnitude Chiller at AHR Show

Automation Platform for Data Centers Launched by GE and Ingersoll Rand

Trane Integrates TR200 Series with Variable Frequency Drive

Trane Launches CenTraVac Centrifugal Chiller

Trane's New Central Geothermal System Solution with a Single Chiller Option

Products from Daikin Acclaimed with 2011 AHR Expo Innovation Awards

Rheem Showcases New Look for its Brands and Products at the AHR Expo 2011

Johnson Controls Enhances YORK® CYK Chillers' Flexibility with an Improved Control Center

Johnson Controls in Contract for Expanding Makkah's Holy Mosque

Dunham-Bush Offers Innovative Ice, Solar and CO2 Products

Carrier's Charlotte Chiller Operation Assigned Top North American Plant

CO2 Product Conservation Meter Launched by Carrier

Carrier Launches AdvanTE3C Solutions Center

Toshiba Home Appliances Takes Over Residential Air-Conditioning Business in Japan from Toshiba Carrier JV

Midea to Acquire Stake in Carrier's Egyptian Air-Conditioning Operations

Carrier Corporation Forms Distribution Venture with Russell Sigler

Goodman Global's ComfortNet™ Introduces Communicating Control System

McQuay International Enhances Distribution of HVAC Systems with HTS in Texas

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

VAV System for Small to Medium Sized Buildings Launched by McQuay
HydroKool LLC, a Custom HVAC Solutions Company, Acquired by McQuay International
McQuay International and Prem.Air New York Collaborate to Serve New York City Area
McQuay International Obtains ISO 14001:2004 Certification
Pathfinder Chiller from Daikin McQuay Finds Place in 2009 Top Products List
Daikin McQuay's Pathfinder™ Air-Cooled Chiller with a New Variable Frequency Drive
Increased Efficiency Rating for Daikin's VRV@III-S
Navigation Remote Controller Introduced by Daikin
Rheem's Tankless Technology for Integrated HVAC and Water Heating
AHRI Approves Trane's Run Test Facility for Air-Cooled Water Chilling Systems
iQ Zone™ Zoning System Launched by Nordyne
Nordyne 13-SEER Air Conditioners with R-410A Upgraded with Micro-Channel Aluminum Coil Technology
Nordyne (Tappan, Frigidaire) Debuts Builder's Series Model Variable Refrigerant TVR™ Air Conditioning System Introduced by Trane
Trane's Series R@ RTWD, Third Generation Water-Cooled Chiller Launched
YORK® YK-EP "Energy Plus" Chiller Launched by Johnson Controls
Johnson Controls Signs Agreement with M&A Supply
Lennox's T-Class™ Split Systems Conferred with Gold 2009 Dealer Design Award
Lennox Launches New Emergence™ Rooftop Unit Product Line
NSPE Awards AAON with 2009 Product of the Year Award
AAON's Canadian Operations to be Shut Down
Carrier and Watsco, Inc. Enter into a Joint Venture
Nordyne to Restructure its Boonville Facility
Rheem to Debut Rheem HP-50 Heat Pump Water Heater
Rheem Shuts Down Milledgeville Heating and Cooling Plant Unit
Trane Inc Selected by Kohinor Planet Constructions for Installing Energy Efficient Chilled Water System into a New Hospital

7. THE UNITED STATES MARKET OVERVIEW

7.1 Shipment Value Analysis by CAC Major Segments
7.2 Shipment Value Analysis by DX AC Sub-Segments
7.2.1 Shipment Value Analysis by Split AC Systems Cooling Capacity
7.2.2. Shipment Value Analysis by Packaged AC Systems Cooling Capacity
7.2.3 Shipment Value Analysis by Heat Pump Type and Cooling Capacity
7.3 Shipment Value Analysis by Central Plant AC Sub-Segments
7.3.1 Shipment Value Analysis by Chiller Types and Capacity
7.3.2 Shipment Value Analysis by AHU Types
7.3.3 Shipment Value Analysis by Fan Coil Unit Types
7.4 Unit Shipments Analysis by CAC Major Segments

7.5 Unit Shipments Analysis by DX AC Sub-Segments
7.5.1 Unit Shipments Analysis by Split AC Systems Cooling Capacity
7.5.2 Unit Shipments Analysis by Packaged AC Systems Cooling Capacity
7.5.3 Unit Shipments Analysis by Heat Pump Type and Cooling Capacity
7.6 Unit Shipments Analysis by Central Plant AC Sub-Segments
7.6.1 Unit Shipments Analysis by Chiller Types and Capacity
7.6.2 Unit Shipments Analysis by AHU Types
7.6.3 Unit Shipments Analysis by Fan Coil Unit Types

8. INDUSTRY OUTLOOK

9. ANNEXURE

9.1 Research Methodology
9.2 The Questionnaire
9.3 Feedback

Charts & Graphs

Chart 1: United States Central Air Conditioning Market Analysis (2006-2015) in Unit Shipments and Shipment Value
Chart 2: Split Central Air Conditioners
Chart 3: Packaged Central Air Conditioners
Chart 4: Split Air Source Heat Pumps
Chart 5: Packaged Air Source Heat Pumps
Chart 6: Commercial Unitary Air Conditioning (AC) and Heat Pump (HP)
Chart 7: Refrigerants with Ozone Depletion and Global Warming Potential
Chart 8: Market Share Analysis (2009) – United States CAC Major Players by Shipment Value (USD million) and Unit Shipments
Chart 9: Market Share Analysis (2009) – United States CAC Major Players Shipment Value (USD million) by Major Product Segments
Chart 10: Market Share Analysis (2009) – United States CAC Major Players Unit Shipments by Major Product Segments
Chart 11: United States Central Air Conditioning Shipment Value Analysis (2006-2015) by Major Product Segment – Direct Expansion (DX) Systems and Central Plant Systems in USD Million
Chart 12: Glance at 2006, 2010 and 2015 United States Central Air Conditioning Market Share (%) by Major Product Segment – Direct Expansion (DX) Systems and Central Plant Systems
Chart 13: United States Direct Expansion (DX) AC Systems Shipment Value Analysis (2006-2015) by Product Segment – Split AC Systems, Packaged AC Systems and Heat Pumps in USD Million
Chart 14: Glance at 2006, 2010 and 2015 United States Direct Expansion (DX) AC Systems Market Share (%) by Product Segment – Split AC Systems, Packaged AC Systems and Heat Pumps
Chart 15: United States Split AC Systems Shipment Value (USD Thousands) (2009 & 2010) – by cooling capacity (Btuh)
Chart 16: United States Packaged AC Systems Shipment Value (USD Thousands) (2009 & 2010) – by cooling capacity (Btuh)
Chart 17: United States Heat Pumps Shipment Value (USD Thousands)

CENTRAL AIR CONDITIONING SYSTEMS – A US MARKET OVERVIEW

(2009 & 2010) – by type

Chart 18: United States Air Source Heat Pumps Shipment Value (2009 & 2010) – by cooling capacity (Btuh)

Chart 19: United States Central Plant AC Systems Shipment Value Analysis (2006-2015) by Product Segment – Chillers, Cooling Towers, Air Handling Units and Fan Coil Units in USD Million

Chart 20: Glance at 2006, 2010 and 2015 United States Central Plant AC Systems Market Share (%) by Product Segment – Chillers, Cooling Towers, Air Handling Units and Fan Coil Units

Chart 21: United States Chillers Shipment Value (2009 & 2010) – by type of compressor and capacity (hp)

Chart 22: United States Air Handling Units Shipment Value (2009 & 2010) – by type

Chart 23: United States Fan Coils Shipment Value (2009 & 2010) – by type

Chart 24: United States Central Air Conditioning Unit Shipments Analysis (2006-2015) by Product Segment – DX Systems and Central Plant Systems in Units

Chart 25: Glance at 2006, 2010 and 2015 United States Central Air Conditioning Unit Shipments Share (%) by Product Segment – Direct Expansion (DX) Systems and Central Plant Systems

Chart 26: United States Direct Expansion (DX) AC Systems Unit Shipments Analysis (2006-2015) by Product Segment – Split AC Systems, Packaged AC Systems and Heat Pumps in Units

Chart 27: Glance at 2006, 2010 and 2015 United States Direct Expansion (DX) AC Systems Unit Shipments Share (%) by Product Segment – Split AC Systems, Packaged AC Systems and Heat Pumps

Chart 28: United States Split System Central Air Conditioning Unit Shipments (2009 & 2010) – by cooling capacity (Btuh)

Chart 29: United States Packaged Central Air Conditioning Unit Shipments (2009 & 2010) – by cooling capacity (Btuh)

Chart 30: United States Heat Pump Unit Shipments (2009 & 2010) – by type

Chart 31: United States Air Source Heat Pump Unit Shipments (2009 & 2010) – by cooling capacity (Btuh)

Chart 32: United States Central Plant AC Systems Unit Shipments Analysis (2006-2015) by Product Segment – Chillers, Cooling Towers, Air Handling Units and Fan Coil Units in Units

Chart 33: Glance at 2006, 2010 and 2015 United States Central Plant AC Systems Unit Shipments Share (%) by Product Segment – Chillers, Cooling Towers, Air Handling Units and Fan Coil Units

Chart 34: United States Chillers Unit Shipments (2009 & 2010) – by type of compressor and capacity (hp)

Chart 35: United States Air Handling Unit Systems Unit Shipments (2009 & 2010) – by type

Chart 36: United States Fan Coil Unit Shipments (2009 & 2010) – by type

For more information please visit: [Central Air Conditioning Systems – A US Market Overview](#)