

Ventilation Equipment – A US Market Overview

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Abstracts

United States Ventilation Equipment Market Trends and Outlook

The U.S. ventilation equipment manufacturing industry experienced a slight contraction of 0.5% in 2020, with production declining to 24.7 million units. This modest downturn showcased the industry's resilience during the significant challenges posed by the COVID-19 pandemic. On the supply side, operational restrictions impacted many businesses, while demand in the residential sector remained relatively strong. The pandemic underscored the critical importance of healthy and filtered indoor air in workplaces, homes, public establishments, and retail spaces. Additionally, historically low interest rates in 2020 and rising per capita disposable income spurred residential construction, which further supported industry sales. As disposable incomes increased, consumers allocated more funds to home improvements, including ventilation upgrades. However, the non-residential construction sector, a key market for new ventilation equipment, faced reduced demand for commercial spaces due to the pandemic's effects.

Demand rebounded sharply in 2021 and 2022, driven by a recovery in commercial and residential construction, government-backed renovation initiatives, and heightened awareness of the importance of Indoor Air Quality (IAQ) following the pandemic. This resurgence revitalized a previously stagnant market. Ventilation equipment shipments grew by 6.5% in 2021 as the economy began to stabilize. The U.S. ventilation market saw significant growth during this period, fueled by infrastructure investments, particularly in air handling units and other ventilation products for homes and schools.

However, in 2023, demand declined slightly as economic uncertainty, rising interest rates, and escalating construction costs slowed construction activity across the region. Additionally, the sharp rise in interest rates since mid-2022 further curtailed housing demand, which reduced the need for ventilation equipment during the 2023-2024 period.

reaching US\$5 billion in 2024. Shipment value of the United States ventilation equipment is projected to grow by a CAGR of 5.7% over the forecast period, reaching US\$7 billion by 2030, attributed mainly to high growth in sales of high valued HRV/ERV Units.

Major companies operating in the United States Ventilation Equipment market include Air Distribution Technologies, Captiveaire Systems, Greenheck Fan Corporation, Chart Industries, Inc. (Howden), FlaktGroup (Woods Air Movement/SEMCO), Loren Cook Company, Munters Corporation, Nortek Air Solutions, LLC. (Madison Air), Robinson Fans, Inc., S&P USA Ventilation Systems, LLC, Systemair USA, The New York Blower Company, and Twin City Fan Companies, Ltd. among others.

United States Ventilation Equipment Market Analysis by Product Segment

The market for United States Ventilation Equipment by product segment analyzed in this report include Axial Fans, Centrifugal Fans, Centrifugal Blowers, Tangential/Cross Flow Fans, Domestic Exhaust Fans, Power Roof Ventilators, Range Hoods, Industrial Propeller Fans, Air Handling Units (AHUs) for Ventilation, and Heat Recovery/Energy Recovery Ventilation Units. Axial Fans is the largest segment in terms of volume shipments in the United States ventilation equipment market with a share of 34% in 2023 and anticipated to post a CAGR of 3.6% between 2024 and 2030 in reaching 11.9 million units in 2030. In terms of value, HRV/ERV Units corners the largest share of the United States ventilation equipment market, estimated at 25.4% in 2024, followed closely by Centrifugal Fans, Axial Fans, and Centrifugal Blowers.

United States Ventilation Equipment Market Report Scope

This United States Ventilation Equipment report analyzes the market size based on annual unit shipments by ventilation equipment manufacturers. This market report analyzes US ventilation equipment volume shipments and value by product segment for the period 2021-2030 with forecasts from 2024 to 2030. In addition to providing profiles of major companies operating in the United States ventilation industry, the latest corporate and industrial developments have been covered to offer a clear panorama of the United States ventilation industry.

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Volume Shipments in units and Value market in US\$

Companies Mentioned: 40+

United States Ventilation Equipment Market by Product Segment

Axial Fans

Directly_driven

Belt_driven

Centrifugal Fans

Centrifugal classes I and II fans

Centrifugal classes III and IV fans

Industrial Centrifugal Fans

Other centrifugal fans (including attic fans)

Centrifugal Blowers

Centrifugal blower_filter units

Positive Displacement Centrifugal Blowers

Multistage Centrifugal Blowers

Tangential/Cross Flow Fans

Domestic Exhaust Fans

Power Roof Ventilators

Axial and Propeller type

Centrifugal type

Range Hoods

Industrial Propeller Fans

Directly_driven

Belt_driven

Air Handling Units (AHUs) for Ventilation

Heat Recovery/Energy Recovery Ventilation Units

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Tangential/Cross Flow Fans

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Air Handling Units (AHUs) for Ventilation

Heat Recovery/Energy Recovery Ventilation Units

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ANSI/ASHRAE Standard 62.2-2022 - Ventilation and Acceptable Indoor Air Quality in

Residential Buildings

Standard 90.1-2022 - Energy Standard for Sites and Buildings Except Low-Rise

Residential Buildings

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Air Distribution Technologies, Inc.
Captiveaire Systems
Greenheck Fan Corporation
Chart Industries, Inc. (Howden)
FlaktGroup (Woods Air Movement/SEMCO)
Loren Cook Company
Munters Corporation
Nortek Air Solutions, LLC. (Madison Air)
Robinson Fans, Inc.
S&P USA Ventilation Systems, LLC
Systemair USA
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