The World Market for Fans & Blowers

This report is IHS’ first edition of a global market study covering fans and blowers in HVAC and industrial applications. IHS’ aim in writing this report is to provide strategic-marketing personnel with a detailed set of market data to fully understand the global market for fans and blowers.

This report is part of IHS’ expanding coverage of motor-driven equipment such as fans, pumps, and compressors. This study will be a one-volume report that aims to quantify total global demand for fans and blowers. Revenue and unit data will be collected for 2012 and 2013, and market forecasts will be generated for the period 2013 to 2018. The report will also discuss the competitive environment in light of recent trends and tendencies.

Key Issues Addressed

- How large were the global fan and blower markets in terms of revenues and units in 2012 and 2013?
- Which regional markets are poised for the fastest growth? Why?
- What is the shape of the competitive environment and what changes are estimated to occur throughout the forecast period?
- What growth forecast is expected for the global fan and blower markets from 2013 to 2018?
- What trends and legislation will affect the fan and blower markets during this period?
- Which industry sectors are expected to outperform or underperform the total market during the forecast period?

Applicable To

- Fan and blower manufacturers
- Motor manufacturers
- Variable frequency drive (VFD) suppliers
- Systems integrators of air-handling equipment
- Fan and blower distributors
- Original Equipment Manufacturers (OEMs) that integrate fans and blowers into other products
- Trade associations seeking to provide their members with relevant and current market information
- Institutions with a vested interest in the regulation of energy-efficiency for motor-driven equipment

Fan & Blower Definition

For the purpose of this report, fans and blowers are defined as rotary bladed machines that utilize an impeller, fit to a shaft and bearings, to provide a continuous flow of gas, typically air, passing through it. The difference between a fan and blower is the input/output pressure ratios. Fans have a specific ratio up to 1.11, whereas a blower has a specific ratio between 1.11 and 1.20, per the American Society of Mechanical Engineers (ASME). To be considered in this study, manufacturers will only report data for fans and blowers used in HVAC and industrial applications.
REPORT CONTENT

Note: The research will provide detailed information on the subjects listed here. However, the final scope may change slightly, and therefore other issues may also be addressed.

Introduction, Scope, Methodology

Market segmentations will include analyses by product type, sub-product type, diameter, industry sector and applications, region, drive system package, and sales channel. This report will also evaluate the competitive environment in the market for fans and blowers. The current structure of the market, including an evaluation of the different types of suppliers, will be included in this analysis.

Primary data will be gathered from fan and blower manufacturers in order to build a bottom-up analysis of the market structure. Through questionnaires and face-to-face interviews this study will accurately capture the current and future trends and developments that shape the market. Additional support will be provided by IHS analysts in Southeast Asia in order to better understand this highly fragmented market.

RESEARCH METHODOLOGY

Example Table

Table x.x
World Market for Axial Fans in Residential HVAC Applications by Sub-product Type
Revenues ($M), Units (k), and Average Selling Prices (ASPs) from 2012 to 2018

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<td>Circulating Fans</td>
<td>Revenues ($M)</td>
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<td>Tube Axial Fans</td>
<td>Revenues ($M)</td>
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<td>Panel Prop Fans</td>
<td>Revenues ($M)</td>
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<td>Revenues ($M)</td>
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<td>Annual Growth</td>
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<td>Unit Shipments</td>
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<td>Annual Growth</td>
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Source: IHS Mar-14
# REPORT SEGMENTATIONS

## Product Type Market Data

### Residential HVAC Fans
- Axial Fans
  - Circulating Fans
  - Tube Axial
  - Panel Prop
- Centrifugal Fans
  - Housed – Backward Inclined
  - Housed – Forward Curved
  - Unhoused
- Powered Roof/Wall Ventilators
  - Axial
  - Centrifugal HRV/ERV

### Commercial HVAC Fans
- Axial Fans
  - Circulating Fans
  - Tube Axial
  - Panel Prop
  - Vane Axial
- Mixed-flow/Centrifugal In-line Centrifugal Fans
  - Housed – Backward Inclined
  - Housed – Forward Curved
  - Unhoused
- Powered Roof/Wall Ventilators
  - Axial
  - Centrifugal HRV/ERV

### Industrial Fans
- Axial Fans
  - Circulating Fans
  - Tube Axial
  - Panel Prop
  - Vane Axial
- Mixed-flow/Centrifugal In-line Centrifugal Fans
  - Housed – Backward Inclined
  - Housed – Forward Curved
  - Unhoused
- Powered Roof/Wall Ventilators
  - Axial
  - Centrifugal HRV/ERV

### Air Curtains
- Blowers

### Fan Diameter
- <5in (125 mm)
- <10in (250mm)
- <20in (500mm)
- <40in (1000mm)
- <80 in (2000mm)
- >80 in (2000mm)

### Top Level Market Data

#### Residential HVAC Applications
- Bathroom/Kitchen Exhaust
- Boilers
- Ceiling Fans
- Condensers
- Central HVAC Fans (Whole House)
- Zone (Room) HVAC Unit
- Other Applications

#### Commercial HVAC Applications
- Boilers
- Condensers
- Dedicated Exhaust
- Dedicated Fresh Air
- Supply & Return
- Other

#### Sales Channel
- Direct to End-user
- Direct to OEM
- Direct to Systems Integrator/Contractor
- Via Distribution

#### Industrial Sectors/Applications
- Chemicals & Petrochemicals
- Food, Beverage, & Tobacco
- Information Technology
- Lighting
- Medical
- Metals Processing
- Mining
  - Dust Control
  - Main Ventilation/Exhaust
  - Process Applications
  - Underground Ventilation
- Oil & Gas
  - API certified
  - Non-API certified
- Power Generation
  - Booster Fans
  - Draft Fans
  - Primary Air
  - Recirculation
  - Other Applications
- Pulp & Paper
- Photovoltaic Inverters
- Telecommunications
- Water Treatment
- Other Industry Sectors

#### Americas
- Brazil
- Canada
- Mexico
- United States
- Rest of Latin America

#### Asia Pacific
- Australia (including NZ)
- China
- India
- Japan
- South Korea
- Rest of Asia Pacific

#### EMEA
- Africa
- Central & Eastern Europe
- France
- Germany
- Italy
- Middle East
- Nordic Countries
- Russian Federation & CIS
- Spain & Portugal
- Switzerland
- Turkey
- UK & Ireland
- Rest of Europe
Why Participate?

- Guaranteed benefits of accurate information and complete confidentiality.
- Tailor the specification of the research to meet specific market research requirements.
- Receive advance access to market estimates and forecast data.
- Gain immediate access to results upon report completion.
- Benefit from IHS as an added resource for continued accessible coverage.

Report Process & Timescales

<table>
<thead>
<tr>
<th>Report Process</th>
<th>Timescales</th>
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<tr>
<td>Key Issue Definition &amp; Early Purchaser Enrollment</td>
<td>November 2013</td>
</tr>
<tr>
<td>Agree on Specification With Early Purchasers</td>
<td>November 2013</td>
</tr>
<tr>
<td>Conduct Interviews &amp; Perform Secondary Research</td>
<td>November to January 2013</td>
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<tr>
<td>Develop Report</td>
<td>January and February 2013</td>
</tr>
<tr>
<td>Issue Preliminary Findings to Early Purchasers</td>
<td>February 2013</td>
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<tr>
<td>Publish Report</td>
<td>March 2013</td>
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Lead Analyst

Preston Reine - Analyst

Preston is a research analyst in IHS’ Industrial Automation Group. As a part of the Motors & Mechanical Power Transmission subgroup, his areas of expertise include end-equipment products such as pumps and fans.

Preston has done extensive research on the pump market and is highly skilled in advanced research methods, statistical interpretation, and public speaking. While conducting his research he has been successful in forming several new working relationships with major suppliers and trade associations in these new areas of study for HIS.

Preston holds a BBS in Finance from Saint Edward’s University and currently works in the company’s Austin, TX, US office.

Learn More about IHS’ Motors & Mechanical Power Transmission Group

IHS is the leading provider of market intelligence on industrial motors and mechanical power transmission. Having studies these markets for more than fifteen years, we have amassed a wealth of insight and market data that is recognized as being the most detailed and accurate of its kind.

The Motors & Mechanical Power Transmission Group provides highly detailed data on product markets such as fractional horsepower motors, gearboxes and geared motors, linear motors and linear motion products, pneumatics and hydraulics, as well as end-equipment such as pumps, fans, and compressors.

Our range of products and services includes detailed annual market reports, quarterly market trackers, and customer surveys. As well as the off-the-shelf studies, we also offer custom research and strategy consultancy services, and have successfully completed projects for some of the world’s largest industrial automation companies.

About IHS Electronics & Media

IHS Electronics & Media combines market, technology and supply chain analysis and forecasts at every operational step of the electronics value chain from strategy, planning and analysis to product design and development and supply chain management.

About IHS (www.ihs.com)

IHS (NYSE: IHS) is the leading source of information, insight and analytics in critical areas that shape today’s business landscape. Businesses and governments in more than 165 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence. IHS has been in business since 1959 and became a publicly traded company on the New York Stock Exchange in 2005. Headquartered in Englewood, Colorado, USA, IHS is committed to sustainable, profitable growth and employs 6,700 people in 31 countries around the world.

For More Information

Preston Reine
Preston.Reine@ihs.com
+1 (512) 582-2059

Americas
electronicsmedia_US@ihs.com

EMEA
electronicsmedia_EMEA@ihs.com

APAC
electronicsmedia_APAC@ihs.com