Data in this presentation comes from HARDI distributor members and D+R International.
• Settlement reached April 24, 2014
• Standard took effect January 1, 2015
• Distributors had 18 months to sell product through

North
AC: 13 SEER
ASHP: 14 SEER

Southwest
AC: 14 SEER
ASHP: 14 SEER

South
AC: 14 SEER
ASHP: 14 SEER
Biggest efficiency gains from:

- Federal standard update
- Growing ductless market

High remaining efficiency potential
2014 - 2015 National Unitary HVAC Sales Growth

- Ductless: +7.6%
- ASHP: +7.8%
- Ducted: +8.7%
- Furnace: +5.4%
- AC: +9.0%
2015 Ducted vs. Ductless Sales by Region

- National: 90% Ducted, 10% Ductless
- Northeastern: 75% Ducted, 25% Ductless
- Mid-Atlantic: 80% Ducted, 20% Ductless
- Great Lakes: 85% Ducted, 15% Ductless
- Southeastern: 90% Ducted, 10% Ductless
- Central: 95% Ducted, 5% Ductless
- Southwestern: 80% Ducted, 20% Ductless
- Western: 90% Ducted, 10% Ductless
2015 Northeast Region Ductless Equipment Sales

Air Conditioners
12.6%

Air-Source Heat Pumps
87.4%
2014 - 2015 Changes in Ductless Market Share

- National: -0.1%
- Northeastern: -0.9%
- Mid-Atlantic: +0.7%
- Great Lakes: 0.0%
- Southeastern: +0.2%
- Central: +0.4%
- Southwestern: -0.5%
- Western: -0.9%

-5% -4% -3% -2% -1% 0% 1% 2% 3% 4% 5%
2015 Ducted vs. Ductless ASHP Sales by Region

- Northeastern
- Mid-Atlantic
- Great Lakes
- Southeastern
- Central
- Southwestern
- Western

Ducted
Ductless
Ductless Market Share

Market Share
Units

- 0%
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- 100%

- 200,000
- 400,000
- 600,000
- 800,000
- 1,000,000
- 1,200,000
- 1,400,000

Ducted: 86%
Ductless: 16%
Ductless Market Share: 9%

Ducted: 33%
Ductless: 16%
Ductless Market Share: 9%

Ducted: 67%
Ductless: 13%
Ductless Market Share: 13%

Ducted: 21%
Ductless: 21%
Ductless Market Share: 21%
2014 – 2015 Changes in Ductless ASHP Market Share

- National: 1.1%
- Northeastern: 0.7%
- Mid-Atlantic: 3.4%
- Great Lakes: 2.1%
- Southeastern: 0.7%
- Central: 6.9%
- Southwestern: -1.4%
- Western: 0.6%
Please contact us with questions or comments. For a copy of the information I’ve just presented:

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