Industrial Ventilation
Market Assessment

NEMI

FMI Corporation
The Industrial Ventilation Market

- Chemical Manufacturing
- Hi Tech
- Utilities
- Warehouses, Mines, Mills
- Food & Beverage
- Automotive Manufacturing
- Wood Processing, Paper & Pulp
- Metal & Mineral Fabrication
- Print, Furniture, & Textile
Industrial Ventilation Defined

- Includes both industrial ductwork and other sheet metal fabrication needs related to industrial ventilation

  - **Industrial ductwork** – Includes all ductwork systems, hoods, exhaust stacks, dampers and equipment supports

  - **Other sheet metal fabrication** – Includes fabrication of chutes, hoppers, conveyance equipment, structural support frames and platforms

- Does not include normal HVAC ductwork
Key Findings

1. **Industrial Ventilation Market growth between 9-12% annually.**

2. **Employee safety and IAQ continue to drive the Industrial Ventilation market.**

3. **Service and maintenance contracts offer substantial growth opportunities.**

4. **Preference for certified contractors and union labor.**
Industrial Ventilation
Market Growth
Estimated Industrial Ventilation Market Size (millions $)

![Graph showing the estimated industrial ventilation market size (millions $) from 2008 to 2018. The graph compares new construction revenue and existing construction revenue. The revenue increases from 2008 to 2018, with new construction revenue generally higher than existing construction revenue.](image_url)
Respondents’ business mix: % Industrial Ventilation – 2008 vs. 2011

2008

Industrial Ventilation 30%
Other 70%

2011

Industrial Ventilation 41%
Other 59%
Estimated Union Industrial Ventilation Market Size Potential (millions $)

New Construction Revenue
Existing Construction Revenue
Estimated Union Industrial Ventilation Labor Hours (000's)

New Construction Revenue □ Existing Construction Revenue
Key Drivers
Industry Drivers

- Indoor Air Quality (IAQ) and employee safety
- Energy efficiency and sustainable construction
- Legislation and regulatory mandates
- Strong construction backlogs (power generation, biotech, electronics, automotive)
- Lack of routine maintenance and proper installation
Causes of Industrial Ventilation System Failure

- Lack of routine maintenance
- Inadequate system design
- Filtration specifications
- Ductwork size and configuration
- Improper system use
- Proper hood installation
- Material & labor workmanship
- Poor construction standards
- Fan specifications

Owners
Providers
Service and Maintenance Contract Opportunity
Preference for Certified and Union Labor Providers

Importance of Certified Providers
- Important: 93%
- Not Important: 7%

Preference for Union or Non-Union Labor
- No Preference: 66%
- Union: 28%
- Non-Union: 6%
Thank You

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