

|   |        |
|---|--------|
| CHAPTER ONE: INTRODUCTION.....  | 1      |
| STUDY BACKGROUND .....  | 1      |
| STUDY GOALS AND OBJECTIVES.....   | 1      |
| INTENDED AUDIENCE.....  | 1      |
| SCOPE OF REPORT .....   | 2      |
| METHODOLOGY .....   | 3      |
| AUTHOR’S CREDENTIALS .....  | 3      |
| RELATED BCC PUBLICATIONS .....  | 4      |
| BCC ONLINE SERVICES.....  | 4      |
| DISCLAIMER .....  | 4      |
| <br>CHAPTER TWO: SUMMARY.....   | <br>5  |
| <i>SUMMARY TABLE U.S. IAQ MARKET BY SEGMENT, THROUGH 2014</i><br><i>(\$ MILLIONS)</i> .....                             | <br>5  |
| <i>SUMMARY FIGURE U.S. IAQ MARKET BY SEGMENT, 2008–2014 (\$</i><br><i>MILLIONS)</i> .....                               | <br>6  |
| <br>CHAPTER THREE: INDUSTRY OVERVIEW.....   | <br>7  |
| THE IMPORTANCE OF THE INDUSTRY .....  | 7      |
| THE IMPORTANCE OF THE INDUSTRY (CONTINUED).....   | 8      |
| HISTORY OF THE INDUSTRY.....  | 9      |
| HISTORY OF THE INDUSTRY (CONTINUED) .....   | 10     |
| HISTORY OF THE INDUSTRY (CONTINUED) .....   | 11     |
| HISTORY OF THE INDUSTRY (CONTINUED) .....   | 12     |
| DESCRIPTION OF THE INDUSTRY .....   | 13     |
| IAQ EQUIPMENT.....  | 13     |
| Air Cleaners.....   | 14     |
| HVAC Equipment.....   | 15     |
| HVAC Replacement Filters.....   | 15     |
| IAQ Instrumentation.....  | 16     |
| IAQ CONSULTING SERVICES.....  | 16     |
| ENVIRONMENTAL SERVICES.....   | 16     |
| Environmental Services (Continued).....   | 17     |
| <br>CHAPTER FOUR THE UNITED STATES INDOOR AIR QUALITY   |        |
| MARKET .....  | 18     |
| <i>TABLE 1 U.S. IAQ MARKET BY SEGMENT, THROUGH 2014 (\$</i><br><i>MILLIONS)</i> .....                                   | <br>18 |
| <i>FIGURE 1 U.S. IAQ MARKET BY SEGMENT, 2008–2014 (\$ MILLIONS)</i> .....   | <br>19 |
| INDOOR AIR QUALITY BACKGROUND .....   | 19     |
| INDOOR AIR QUALITY BACKGROUND (CONTINUED).....  | 20     |
| CAUSES OF IAQ PROBLEMS .....  | 21     |
| <i>TABLE 2 PERCENTAGES OF IAQ PROBLEMS FOUND IN NIOSH</i><br><i>HEALTH HAZARD EVALUATION (HHE) INVESTIGATIONS</i> ..... | <br>22 |

|   |           |
|---|-----------|
| INADEQUATE VENTILATION.....                                       | 22        |
| CONTAMINATION FROM INSIDE A BUILDING .....                        | 22        |
| CONTAMINATION FROM OUTSIDE SOURCES .....                          | 23        |
| MICROBIAL CONTAMINATION.....                                      | 23        |
| CONTAMINATION FROM BUILDING MATERIALS .....                       | 23        |
| COMMON CONTAMINANTS .....   | 23        |
| CARBON MONOXIDE.....  | 24        |
| NITROGEN DIOXIDE .....  | 24        |
| COMBUSTION PRODUCTS .....   | 24        |
| OZONE .....   | 24        |
| FORMALDEHYDE .....  | 25        |
| PARTICULATES.....   | 25        |
| RADON .....   | 25        |
| ASBESTOS .....  | 25        |
| VOLATILE ORGANIC COMPOUNDS .....                                  | 26        |
| ENVIRONMENTAL TOBACCO SMOKE.....                                  | 26        |
| THE EFFECTS OF IAQ CONTAMINANTS .....                             | 26        |
| <i>TABLE 3 IAQ-RELATED ILLNESSES REQUIRING MEDICAL</i>            |           |
| <i>ATTENTION.....</i>   | <i>27</i> |
| THE COST OF IAQ PROBLEMS TO THE U.S. ECONOMY .....                | 28        |
| <i>TABLE 4 IAQ RELATED COSTS TO THE U.S. ECONOMY (\$</i>          |           |
| <i>BILLIONS).....</i>   | <i>28</i> |
| FACTORS DRIVING IAQ INDUSTRY GROWTH.....                          | 28        |
| THE “MOLD RUSH” .....   | 29        |
| The “Mold Rush” (Continued) .....                                 | 30        |
| 9/11 AND BIOTERRORISM .....                                       | 31        |
| SWINE FLU .....   | 32        |
| AMERICANS’ INCREASED AWARENESS AND OPINIONS                       |           |
| CONCERNING IAQ ISSUES .....                                       | 33        |
| <i>TABLE 5 IMPORTANCE OF IAQ IN THE HOME (PERCENTAGES</i>         |           |
| <i>BASED ON SURVEY OF 1,000 U.S. RESIDENTS).....</i>              | <i>34</i> |
| <i>TABLE 6 COMPARISON OF MALE AND FEMALE IAQ HEALTH</i>           |           |
| <i>WORRIES (PERCENTAGES BASED ON SURVEY OF 1,000 U.S.</i>         |           |
| <i>RESIDENTS).....</i>  | <i>34</i> |
| <i>TABLE 7 LEVEL OF CONCERN ABOUT ALLERGENS IN THE HOME</i>       |           |
| <i>AND WORKPLACE BY AGE.....</i>                                  | <i>35</i> |
| <i>TABLE 8 HOMEOWNERS WHO WOULD PURCHASE PRODUCTS TO</i>          |           |
| <i>IMPROVE IAQ IN THE HOME (PERCENTAGES BASED ON A</i>            |           |
| <i>SURVEY OF 1,000 U.S. RESIDENTS).....</i>                       | <i>35</i> |
| <i>TABLE 9 TYPE OF SOLUTION HOMEOWNERS WOULD PURCHASE</i>         |           |
| <i>(PERCENTAGES BASED ON SURVEY OF 1,000 U.S. RESIDENTS).....</i> | <i>36</i> |
| <i>TABLE 10 COMPARISON OF RESPONDENTS INTERESTED</i>              |           |
| <i>INTESTING FOR MOLD (PERCENTAGES BASED ON SURVEY OF</i>         |           |
| <i>1,000 U.S. CITIZENS).....</i>                                  | <i>36</i> |

|  |    |
|--|----|
| <i>TABLE 11 HOMEOWNERS PLANNING IAQ-RELATED IMPROVEMENTS (PERCENTAGES BASED ON SURVEY OF 1,000 U.S. RESIDENTS)</i> .....               | 37 |
| <i>TABLE 12 LEVEL OF CONCERN ABOUT IAQ IN THE WORKPLACE, 2000 AND 2001 (PERCENTAGES BASED ON SURVEY OF 1,000 U.S. RESIDENTS)</i> ..... | 37 |
| CHAPTER FIVE: IAQ EQUIPMENT AND SERVICES MARKET.....   | 38 |
| IAQ EQUIPMENT .....  | 38 |
| <i>TABLE 13 U.S. MARKET VALUE OF IAQ EQUIPMENT BY TYPE, THROUGH 2014 (\$ MILLIONS)</i> .....   | 38 |
| <i>FIGURE 2 U.S. MARKET VALUE OF IAQ EQUIPMENT BY TYPE, 2008–2014 (\$ MILLIONS)</i> .....  | 39 |
| AIR CLEANERS.....  | 39 |
| Types of Available Air Cleaners.....   | 40 |
| Tabletop Units .....   | 41 |
| Room Units.....  | 41 |
| In-Duct or Central Filtration Systems.....   | 41 |
| Types of Air-Cleaning Processes .....  | 42 |
| Mechanical Filters .....   | 42 |
| Flat or Panel Filters .....  | 42 |
| Pleated Filters.....   | 43 |
| HEPA Filters.....  | 43 |
| Electronic Air Cleaners.....   | 44 |
| Ionizers .....   | 44 |
| Electrostatic Precipitators .....  | 44 |
| Hybrid Filters.....  | 45 |
| Gas Phase Filters.....   | 46 |
| Ozone Generators .....   | 47 |
| Air Cleaner Standards.....   | 47 |
| Standards for Portable Air Cleaners.....   | 47 |
| Association of Home Appliance Manufacturers .....  | 48 |
| <i>TABLE 14 ESTIMATED PERCENTAGE OF PARTICLES REMOVED FOR PORTABLE UNITS BY CADR AND ROOM SIZE</i> .....                               | 49 |
| U.S. Food and Drug Administration.....   | 50 |
| Standards for In-Duct Systems .....  | 50 |
| American Society of Heating, Refrigerating, and Air-conditioning Engineering .....   | 51 |
| ASHRAE Standard 52.2 .....   | 51 |
| Military Standard 282 (For HEPA Filters) .....   | 52 |
| AIR CLEANER MARKET VALUE.....  | 52 |
| Air Cleaner Market Value: Portable versus In-Duct .....  | 52 |
| <i>TABLE 15 U.S. AIR CLEANER MARKET VALUE: PORTABLE VERSUS IN-DUCT, THROUGH 2014 (\$ MILLIONS)</i> .....                               | 52 |

|   |    |
|---|----|
| <i>FIGURE 3 U.S. AIR CLEANER MARKET VALUE: PORTABLE VERSUS IN-DUCT, 2008–2014 (\$ MILLIONS)</i> .....     | 53 |
| Sales of High-End and Low-End Portable Air Cleaners.....  | 54 |
| <i>TABLE 16 SALES OF HIGH- AND LOW-END PORTABLE AIR CLEANERS, 2008 (\$ MILLIONS)</i> .....                | 54 |
| <i>FIGURE 4 PERCENTAGE SHARE OF HIGH- AND LOW-END PORTABLE AIR CLEANERS, 2008 (%)</i> .....               | 55 |
| Air Cleaner Market Value Breakdown by Technology Type .....   | 55 |
| <i>TABLE 17 U.S. AIR-CLEANING MARKET VALUE BY TECHNOLOGY TYPE, THROUGH 2014 (\$ MILLIONS)</i> .....       | 56 |
| <i>FIGURE 5 TRENDS IN U.S. AIR CLEANER MARKET VALUE BY TECHNOLOGY TYPE, 2008–2014 (\$ MILLIONS)</i> ..... | 57 |
| Electrostatic Precipitators.....  | 57 |
| HEPA Filters.....   | 58 |
| Ozone Generators .....  | 59 |
| Ionizers.....   | 60 |
| Ionizers (Continued) .....  | 61 |
| Air Cleaner Market Value by Application.....  | 62 |
| <i>TABLE 18 U.S. AIR CLEANER MARKET VALUE BY END-USER CATEGORY, 2008 (\$ MILLIONS)</i> .....              | 62 |
| <i>FIGURE 6 U.S. AIR CLEANERS MARKET VALUE BY END-USER CATEGORY, 2008 (%)</i> .....                       | 62 |
| Air Cleaner Market Leaders .....  | 63 |
| <i>TABLE 19 LEADING AIR CLEANER MANUFACTURERS SALES AND MARKET SHARE, 2008 (\$ MILLIONS, %)</i> .....     | 64 |
| REPLACEMENT FILTERS.....  | 64 |
| Replacement Filter Technologies.....  | 64 |
| Fiberglass .....  | 65 |
| Pleated Paper.....  | 65 |
| Media Filters.....  | 65 |
| Electrostatic Filters .....   | 65 |
| Electronic Air Filters .....  | 66 |
| Washable/Reusable Filters.....  | 66 |
| Additional Commercial Grade HVAC Filters .....  | 66 |
| ASHRAE Filters.....   | 66 |
| HEPA Filters.....   | 66 |
| Carbon Filters .....  | 67 |
| Bag Filters .....   | 67 |
| Filter Efficiency .....   | 67 |
| Filter Performance.....   | 67 |
| <i>TABLE 20 EFFICIENCY OF REMOVING PARTICLES 0.3 MICRON TO 1 MICRON IN SIZE FROM INDOOR AIR (%)</i> ..... | 68 |
| Pressure Drop .....   | 68 |

|   |    |
|---|----|
| <i>TABLE 21 PRESSURE DROP RATINGS OF RESIDENTIAL HVAC FILTERS</i> .....   | 69 |
| REPLACEMENT FILTER MARKET .....   | 69 |
| <i>TABLE 22 U.S. HVAC REPLACEMENT FILTER MARKET VALUE BY END-USER CATEGORY, THROUGH 2014 (\$ MILLIONS)</i> .....      | 70 |
| <i>FIGURE 7 U.S. HVAC REPLACEMENT FILTER MARKET VALUE BY END-USER CATEGORY, 2008–2014 (\$ MILLIONS)</i> .....         | 70 |
| Replacement Filter Market Breakdown .....   | 70 |
| <i>TABLE 23 U.S. RESIDENTIAL REPLACEMENT FILTER MARKET BY FILTER TYPE, 2008 (\$ MILLIONS)</i> .....                   | 71 |
| <i>FIGURE 8 U.S. RESIDENTIAL REPLACEMENT FILTER SHARE BY FILTER TYPE, 2008 (%)</i> .....                              | 71 |
| <i>TABLE 24 U.S. COMMERCIAL REPLACEMENT FILTER MARKET BY CONFIGURATION, 2008 (\$ MILLIONS)</i> .....                  | 72 |
| <i>FIGURE 9 U.S. COMMERCIAL REPLACEMENT FILTER MARKET SHARE BY FILTER CONFIGURATION, 2008 (%)</i> .....               | 73 |
| HVAC Replacement Filter Market Leaders .....  | 73 |
| <i>TABLE 25 COMMERCIAL HVAC REPLACEMENT FILTER MARKET LEADERS SALES AND MARKET SHARE, 2008 (\$ MILLIONS, %)</i> ..... | 74 |
| VENTILATION SYSTEMS.....  | 75 |
| <i>TABLE 26 CAUSES OF SBS</i> .....   | 75 |
| <i>TABLE 27 IAQ PROBLEMS NOTED IN 104 OFFICE BUILDINGS STUDIED BY NIOSH</i> .....                                     | 76 |
| Ventilation Systems Market Value.....   | 76 |
| <i>TABLE 28 U.S. VENTILATION SYSTEMS MARKET VALUE AND GROWTH, THROUGH 2014 (\$ MILLIONS)</i> .....                    | 77 |
| <i>FIGURE 10 U.S. VENTILATION SYSTEMS MARKET VALUE AND GROWTH, 2008–2014 (\$ MILLIONS)</i> .....                      | 77 |
| Most Promising Ventilation Technologies .....   | 78 |
| Demand Control Ventilation .....  | 78 |
| Demand Control Ventilation Technology   |    |
| Manufacturers .....   | 78 |
| Energy Recovery Ventilation.....  | 79 |
| Heat Recovery Ventilation Technologies .....  | 80 |
| Drivers for Energy Recovery Ventilation   |    |
| Technology .....  | 80 |
| Benefits of Energy Recovery   |    |
| Ventilation Technology .....  | 80 |
| Humidity Control.....   | 80 |
| Reduced Design Loads.....   | 81 |
| Energy Savings .....  | 81 |
| Safety and Performance Certification.....   | 81 |
| Equipment Availability .....  | 81 |

|   |    |
|---|----|
| Residential Use of Energy Recovery                            |    |
| Ventilation .....   | 82 |
| Manufacturers of Energy Recovery                              |    |
| Ventilation Systems .....                                     | 82 |
| Similarities between Energy Recovery and                      |    |
| Heat Recovery Ventilation Technologies.....                   | 83 |
| Displacement Ventilation .....                                | 83 |
| Displacement Ventilation Manufacturers .....                  | 84 |
| Air Quality-Related Ventilation Equipment Market Value        |    |
| Breakdown by Type.....  | 84 |
| <i>TABLE 29 U.S. VENTILATION TECHNOLOGY MARKET</i>            |    |
| <i>BREAKDOWN BY TYPE, THROUGH 2014 (\$ MILLIONS)</i> .....    | 85 |
| <i>FIGURE 11 U.S. VENTILATION TECHNOLOGY MARKET</i>           |    |
| <i>BREAKDOWN BY TYPE, 2008–2014 (\$ MILLIONS)</i> .....       | 86 |
| Ventilation System Market Value by Application .....          | 87 |
| <i>TABLE 30 U.S. VENTILATION SYSTEM MARKET VALUE BY END-</i>  |    |
| <i>USER CATEGORY, 2008 (\$ MILLIONS)</i> .....                | 87 |
| <i>FIGURE 12 U.S. VENTILATION SYSTEM MARKET SHARE BY END</i>  |    |
| <i>USER CATEGORY, 2008 (%)</i> .....                          | 88 |
| HVAC Equipment-Related Standards.....                         | 88 |
| ASHRAE Standard 55 .....                                      | 89 |
| <i>TABLE 31 ASHRAE TEMPERATURE RECOMMENDATIONS</i> .....      | 89 |
| ASHRAE Standard 62 .....                                      | 90 |
| <i>TABLE 32 EXAMPLES OF CFM/PERSON IN PARTICULAR TYPES OF</i> |    |
| <i>SPACES ACCORDING TO ASHRAE 62</i> .....                    | 91 |
| ASHRAE Standard 62.2 .....                                    | 91 |
| ASHRAE Standard 90.1 .....                                    | 92 |
| IAQ INSTRUMENTATION .....                                     | 92 |
| IAQ Instrumentation Applications .....                        | 93 |
| Measurements Used to Determine Air Quality.....               | 93 |
| Comfort Issues.....   | 93 |
| Temperature.....  | 93 |
| Humidity.....   | 94 |
| Air Velocity .....  | 94 |
| Volume .....  | 94 |
| Ventilation.....  | 95 |
| Health and Safety Issues.....                                 | 95 |
| Carbon Monoxide .....   | 95 |
| Airborne Particles .....                                      | 96 |
| Biological Contaminants.....                                  | 97 |
| Chemicals in Aerosol Form.....                                | 97 |
| IAQ Instrumentation Market .....                              | 98 |
| <i>TABLE 33 IAQ INSTRUMENTATION APPLICATIONS</i> .....        | 98 |
| <i>TABLE 33 (CONTINUED)</i> .....                             | 99 |

|  |     |
|--|-----|
| <i>TABLE 34 U.S. IAQ INSTRUMENTATION MARKET VALUE, THROUGH 2014 (\$ MILLIONS)</i> .....                  | 99  |
| <i>FIGURE 13 U.S. IAQ INSTRUMENTATION MARKET VALUE, 2008–2014 (\$ MILLIONS)</i> .....                    | 100 |
| IAQ Instrumentation Market Breakdown by Type:  |     |
| Common Instrumentation .....   | 101 |
| <i>TABLE 35 U.S. COMMON IAQ INSTRUMENTATION MARKET VALUE BREAKDOWN BY TYPE, 2008 (\$ MILLIONS)</i> ..... | 101 |
| <i>FIGURE 14 U.S. COMMON IAQ INSTRUMENTATION MARKET SHARE BY TYPE, 2008 (%)</i> .....                    | 102 |
| IAQ Instrumentation Market Breakdown by Type:  |     |
| Specialty Instrumentation .....  | 102 |
| <i>TABLE 36 U.S. SPECIALTY IAQ INSTRUMENTATION MARKET BREAKDOWN BY TYPE, 2008 (\$ MILLIONS)</i> .....    | 103 |
| <i>FIGURE 15 U.S. SPECIALTY IAQ INSTRUMENTATION MARKET BREAKDOWN BY TYPE, 2008</i> .....                 | 103 |
| IAQ Instrumentation Market Value Breakdown by Application.....   | 104 |
| <i>TABLE 37 U.S. IAQ INSTRUMENTATION MARKET VALUE BREAKDOWN BY APPLICATION, 2008 (\$ MILLIONS)</i> ..... | 104 |
| <i>FIGURE 16 U.S. IAQ INSTRUMENTATION MARKET VALUE BREAKDOWN BY APPLICATION, 2008 (%)</i> .....          | 105 |
| Leading Manufacturers of IAQ Instrumentation.....  | 105 |
| <i>TABLE 38 MARKET SHARES OF IAQ INSTRUMENTATION MARKET LEADERS, 2008 (% , \$ MILLIONS)</i> .....        | 106 |
| Stationary IAQ Instrumentation .....   | 106 |
| <i>TABLE 39 COMPARISON OF PORTABLE AND STATIONARY IAQ EQUIPMENT SALES, 2008 (% , \$ MILLIONS)</i> .....  | 107 |
| <i>FIGURE 17 COMPARISON OF PORTABLE IAQ AND STATIONARY IAQ EQUIPMENT SALES, 2008 (%)</i> .....           | 107 |
| IAQ CONSULTING MARKET .....  | 107 |
| <i>TABLE 40 U.S. IAQ CONSULTING INDUSTRY MARKET VALUE AND GROWTH, THROUGH 2014 (\$ MILLIONS)</i> .....   | 108 |
| IAQ ENVIRONMENTAL SERVICES MARKET .....  | 108 |
| THE MOLD REMEDIATION INDUSTRY .....  | 109 |
| Mold Background.....   | 109 |
| Mold-Related Health Effects .....  | 110 |
| Mold Remediation Practices.....  | 110 |
| Remediation Plan.....  | 110 |
| Mold Sampling .....  | 111 |
| Remediation Equipment.....   | 111 |
| Moisture Meters .....  | 112 |
| Humidity Gauges .....  | 112 |
| Boroscope .....  | 112 |

|   |     |
|---|-----|
| Mold Remediation Cleanup Methods.....                                     | 112 |
| Wet Vacuum.....   | 113 |
| Damp Wipe.....  | 113 |
| HEPA Vacuum.....  | 113 |
| Disposal of Damaged Materials.....  | 113 |
| Biocides.....   | 113 |
| UV Lights.....  | 114 |
| Mold Remediation Guidelines.....  | 115 |
| S520 Standard and Reference Guide for Mold<br>Remediation.....            | 116 |
| S520 Standard...(Continued).....  | 117 |
| Mold Certifications.....  | 118 |
| Indoor Air Quality Association Certifications.....                        | 118 |
| American Indoor Air Quality Council Certifications.....                   | 118 |
| Institute of Inspection, Cleaning, and Restoration<br>Certifications..... | 119 |
| American Industrial Hygiene Association<br>Certifications.....            | 119 |
| Mold Legislation.....   | 119 |
| Federal Legislation.....  | 119 |
| State Legislation.....  | 119 |
| Arizona.....  | 120 |
| California.....   | 120 |
| Connecticut.....  | 120 |
| Idaho.....  | 120 |
| Illinois.....   | 121 |
| Indiana.....  | 121 |
| Louisiana.....  | 121 |
| Maryland.....   | 121 |
| New Jersey.....   | 121 |
| New York.....   | 121 |
| Nevada.....   | 122 |
| Oklahoma.....   | 122 |
| Pennsylvania.....   | 122 |
| Tennessee.....  | 122 |
| Texas.....  | 122 |
| ASBESTOS ABATEMENT.....   | 123 |
| Asbestos Background.....  | 123 |
| Asbestos Health Effects.....  | 124 |
| Asbestos in the Home.....   | 125 |
| How to Identify Materials that Contain Asbestos.....                      | 126 |
| How to Manage an Asbestos Problem.....                                    | 126 |
| Asbestos Professionals.....   | 127 |
| History of the Asbestos Abatement Industry.....                           | 127 |



|   |     |
|---|-----|
| Asbestos Removal Industry Setbacks .....  | 128 |
| Current State of the Asbestos Abatement Industry .....  | 128 |
| RADON REMOVAL .....   | 129 |
| Radon Background .....  | 129 |
| Radon-Related Health Effects .....  | 130 |
| The U.S. Radon Problem .....  | 130 |
| Testing for Radon .....   | 130 |
| Short-term Testing .....  | 131 |
| Long-term Testing .....   | 131 |
| Reducing Indoor Radon Levels .....  | 131 |
| Slowing of the Radon Repair Industry .....  | 132 |
| IAQ ENVIRONMENTAL SERVICES MARKET .....   | 132 |
| IAQ Environmental Services Market Breakdown: Services<br>and Equipment .....                                  | 132 |
| <i>TABLE 41 U.S. IAQ ENVIRONMENTAL SERVICES MARKET VALUE<br/>AND GROWTH, THROUGH 2014 (\$ MILLIONS)</i> ..... | 133 |
| <i>FIGURE 18 U.S. ENVIRONMENTAL SERVICES MARKET VALUE,<br/>2008–2014 (\$ MILLIONS)</i> .....                  | 133 |
| IAQ Environmental Services Market Breakdown by Type .....   | 134 |
| <i>TABLE 42 U.S. IAQ ENVIRONMENTAL SERVICES MARKET<br/>BREAKDOWN BY TYPE, 2008* (% , \$ MILLIONS)</i> .....   | 134 |
| <i>FIGURE 19 U.S. IAQ ENVIRONMENTAL SERVICES MARKET<br/>BREAKDOWN BY TYPE, 2008* (%)</i> .....                | 134 |
| Reasons for IAQ Environmental Services Industry<br>Growth .....   | 135 |
| <br>CHAPTER SIX: IAQ END-USE APPLICATIONS AND MARKET<br>POTENTIAL .....                                       | 136 |
| INTRODUCTION .....  | 136 |
| <i>TABLE 43 IAQ MARKET BY END-USER SEGMENT, THROUGH 2014<br/>(\$ MILLIONS)</i> .....                          | 136 |
| <i>FIGURE 20 IAQ MARKET SHARES BY END-USER SEGMENT, 2008<br/>AND 2014 (PERCENTAGE OF TOTAL SALES)</i> .....   | 137 |
| RESIDENCES .....  | 138 |
| POLLUTANTS COMMONLY FOUND IN THE HOME .....   | 138 |
| Respirable Particles .....  | 138 |
| Organic Pollutants .....  | 139 |
| Formaldehyde .....  | 139 |
| Pesticides .....  | 139 |
| Lead .....  | 140 |
| Asbestos .....  | 140 |
| Biological Pollutants .....   | 141 |
| Nitrogen Dioxide .....  | 141 |
| Carbon Monoxide .....   | 141 |
| Radon .....   | 142 |

|  |            |
|--|------------|
| Environmental Tobacco Smoke.....                                   | 142        |
| RESIDENTIAL INDOOR AIR POLLUTION AND HEALTH .....                  | 142        |
| Immediate Effects.....   | 143        |
| Long-term Effects .....  | 143        |
| RESIDENTIAL MARKET .....   | 144        |
| <i>TABLE 44 COMMON RESIDENTIAL AIR POLLUTANTS AND</i>              |            |
| <i>CONTROL METHODS.....</i>  | <i>144</i> |
| <i>TABLE 44 (CONTINUED).....</i>                                   | <i>145</i> |
| <i>TABLE 45 NUMBER OF US RESIDENCES WITH POTENTIAL NEED</i>        |            |
| <i>FOR IAQ EQUIPMENT AND SERVICES, 2007 (MILLIONS).....</i>        | <i>146</i> |
| <i>FIGURE 21 U.S. RESIDENCES WITH POTENTIAL NEED FOR IAQ</i>       |            |
| <i>EQUIPMENT AND SERVICES, 2007 (MILLION UNITS).....</i>           | <i>146</i> |
| RESIDENTIAL IAQ EQUIPMENT MARKET .....                             | 146        |
| <i>TABLE 46 U.S. RESIDENTIAL IAQ EQUIPMENT MARKET,</i>             |            |
| <i>THROUGH 2014 (\$ MILLIONS).....</i>                             | <i>147</i> |
| <i>FIGURE 22 U.S. RESIDENTIAL IAQ EQUIPMENT MARKET, 2008–</i>      |            |
| <i>2014 (\$ MILLIONS).....</i>                                     | <i>147</i> |
| RESIDENTIAL IAQ CONSULTING AND ENVIRONMENTAL                       |            |
| SERVICES MARKET .....  | 147        |
| <i>TABLE 47 U.S. RESIDENTIAL IAQ CONSULTING AND</i>                |            |
| <i>ENVIRONMENTAL SERVICES MARKET, THROUGH 2014 (\$</i>             |            |
| <i>MILLIONS).....</i>  | <i>148</i> |
| <i>FIGURE 23 U.S. RESIDENTIAL IAQ CONSULTING AND</i>               |            |
| <i>ENVIRONMENTAL SERVICES MARKET, 2008–2014 (\$ MILLIONS).....</i> | <i>148</i> |
| COMMERCIAL BUILDINGS.....  | 149        |
| HEALTH PROBLEMS AND VENTILATION .....                              | 149        |
| CONTROLLING INDOOR AIR POLLUTION IN                                |            |
| COMMERCIAL BUILDINGS.....  | 149        |
| COMMERCIAL VENTILATION SYSTEMS PROBLEMS AND                        |            |
| SOLUTIONS .....  | 150        |
| Common Problems with HVAC System Design .....                      | 150        |
| Intermittent Air Flow .....  | 150        |
| Distribution of Air.....   | 150        |
| Building Supply and Exhaust Locations .....                        | 150        |
| Outdoor Air .....  | 151        |
| Periods of Operation .....   | 151        |
| Maintenance.....   | 151        |
| Air Cleaners .....   | 151        |
| COMMERCIAL BUILDING MARKET FOR IAQ EQUIPMENT                       |            |
| AND SERVICES .....   | 152        |
| Commercial Building ...(Continued).....                            | 153        |
| <i>TABLE 48 U.S. COMMERCIAL BUILDINGS WITH POTENTIAL</i>           |            |
| <i>NEED FOR IAQ EQUIPMENT AND SERVICES (MILLIONS).....</i>         | <i>154</i> |

|  |            |
|--|------------|
| <i>FIGURE 24 U.S. COMMERCIAL BUILDINGS WITH POTENTIAL<br/>NEED FOR IAQ EQUIPMENT AND SERVICES (MILLIONS).....</i>                      | <i>155</i> |
| COMMERCIAL BUILDING MARKET FOR IAQ EQUIPMENT .....   | 155        |
| <i>TABLE 49 U.S. IAQ EQUIPMENT MARKET IN COMMERCIAL<br/>BUILDING, THROUGH 2014 (\$ MILLIONS) .....</i>                                 | <i>156</i> |
| <i>FIGURE 25 U.S. IAQ EQUIPMENT MARKET IN COMMERCIAL<br/>BUILDINGS, 2008–2014 (\$ MILLIONS).....</i>                                   | <i>156</i> |
| COMMERCIAL BUILDING MARKET FOR IAQ CONSULTING<br>AND ENVIRONMENTAL SERVICES .....  | 156        |
| <i>TABLE 50 U.S. IAQ CONSULTING AND ENVIRONMENTAL<br/>SERVICES MARKET IN COMMERCIAL BUILDINGS, THROUGH<br/>2014 (\$ MILLIONS).....</i> | <i>157</i> |
| <i>FIGURE 26 U.S. IAQ CONSULTING AND ENVIRONMENTAL<br/>SERVICES MARKET IN COMMERCIAL BUILDINGS, 2008–2014 (\$<br/>MILLIONS).....</i>   | <i>157</i> |
| SCHOOLS .....  | 158        |
| IAQ ISSUES UNIQUE TO SCHOOLS .....   | 158        |
| WHY ADDRESSING IAQ ISSUES IN SCHOOLS IS<br>IMPORTANT .....   | 158        |
| INDOOR AIR POLLUTANTS OF CONCERN IN SCHOOLS .....  | 159        |
| Biological Contaminants .....  | 159        |
| Carbon Dioxide .....   | 160        |
| Carbon Monoxide.....   | 160        |
| Dust.....  | 161        |
| Secondhand Smoke.....  | 162        |
| Lead.....  | 162        |
| Nitrogen Oxides .....  | 163        |
| Pesticides .....   | 163        |
| Radon .....  | 163        |
| Volatile Organic Compounds .....   | 164        |
| FILTRATION FOR IMPROVED SCHOOL IAQ.....  | 165        |
| <i>TABLE 51 AIR QUALITY RECOMMENDATIONS FOR EDUCATION<br/>FACILITIES.....</i>  | <i>166</i> |
| SCHOOL IAQ EQUIPMENT MARKET.....   | 166        |
| <i>TABLE 52 U.S. SCHOOL IAQ EQUIPMENT MARKET, THROUGH 2014<br/>(\$ MILLIONS).....</i>  | <i>167</i> |
| <i>FIGURE 27 U.S. SCHOOL IAQ EQUIPMENT MARKET, 2008–2014 (\$<br/>MILLIONS).....</i>  | <i>167</i> |
| SCHOOL CONSULTING AND ENVIRONMENTAL SERVICES<br>MARKET .....   | 167        |
| <i>TABLE 53 U.S. SCHOOL IAQ CONSULTING AND ENVIRONMENTAL<br/>SERVICES MARKET, THROUGH 2014 (\$ MILLIONS).....</i>                      | <i>168</i> |
| <i>FIGURE 28 U.S. SCHOOL IAQ CONSULTING AND<br/>ENVIRONMENTAL SERVICES MARKET, 2008–2014 (\$ MILLIONS).....</i>                        | <i>168</i> |

|  |     |
|--|-----|
| HEALTHCARE FACILITIES.....   | 169 |
| THE IMPORTANCE OF GOOD INDOOR AIR QUALITY IN<br>HEALTHCARE FACILITIES.....   | 169 |
| The Importance of ...(Continued) .....   | 170 |
| AIA GUIDELINES ON HEALTHCARE FACILITY AIR<br>QUALITY .....   | 171 |
| HEALTHCARE-RELATED MARKET FOR IAQ EQUIPMENT .....  | 172 |
| TABLE 54 U.S. HEALTHCARE IAQ EQUIPMENT MARKET,<br>THROUGH 2014 (\$ MILLIONS).....                                      | 172 |
| FIGURE 29 U.S. HEALTHCARE IAQ EQUIPMENT MARKET, 2008–<br>2014 (\$ MILLIONS).....                                       | 173 |
| HEALTHCARE MARKET FOR IAQ CONSULTING AND<br>ENVIRONMENTAL SERVICES MARKET .....  | 173 |
| TABLE 55 U.S. HEALTHCARE IAQ CONSULTING AND<br>ENVIRONMENTAL SERVICES MARKET VALUE, THROUGH 2014<br>(\$ MILLIONS)..... | 173 |
| FIGURE 30 U.S. HEALTHCARE IAQ CONSULTING AND<br>ENVIRONMENTAL SERVICES MARKET VALUE, 2008–2014 (\$<br>MILLIONS).....   | 174 |
| CHAPTER SEVEN: PATENT ANALYSIS .....   | 175 |
| SEARCH CRITERIA.....   | 175 |
| FIGURE 31 U.S. INDOOR AIR QUALITY EQUIPMENT PATENTS BY<br>TYPE OF EQUIPMENT, ISSUED 2000–JUNE 2009 (%).....            | 176 |
| FIGURE 32 NUMBER OF U.S. INDOOR AIR QUALITY EQUIPMENT<br>PATENTS ISSUED EACH YEAR, 2000–2008.....                      | 177 |
| TABLE 56 COMPANIES WITH MULTIPLE IAQ EQUIPMENT<br>PATENTS ISSUED BETWEEN JAN. 1, 2000 AND JUNE 30, 2009.....           | 177 |
| TABLE 56 (CONTINUED).....  | 178 |
| CHAPTER EIGHT: COMPANY PROFILES .....  | 179 |
| 3M .....   | 179 |
| AAF-MCQUAY, INC.....   | 179 |
| APRILAIRE.....   | 179 |
| CAMFIL FARR.....   | 180 |
| CARRIER CORP. ....   | 180 |
| CLARCOR, INC. ....   | 181 |
| FILTRATION GROUP.....  | 181 |
| FRIEDRICH AIR CONDITIONING CO.....   | 182 |
| GRAY WOLF SENSING SOLUTIONS.....   | 182 |
| HALTON CO. ....  | 183 |
| THE HOLMES GROUP.....  | 183 |
| HONEYWELL INTERNATIONAL.....   | 183 |
| HUNTER FAN CO.....   | 184 |
| KD ENGINEERING .....   | 184 |

|  |     |
|--|-----|
| LENNOX INTERNATIONAL .....                                   | 184 |
| NU-AIR VENTILATION SYSTEMS.....                              | 185 |
| QUEST TECHNOLOGIES .....                                     | 185 |
| RENEWAIRE .....  | 186 |
| TESTO .....  | 186 |
| TRANE .....  | 186 |
| TSI INC. ....  | 187 |
| UNITED AIR SPECIALISTS .....                                 | 187 |
| WHIRLPOOL CORP.....  | 188 |
| APPENDIX.....  | 189 |
| IAQ COMPANIES AND SIGNIFICANT PRODUCTS.....                  | 189 |
| <i>TABLE 57 IAQ COMPANIES AND SIGNIFICANT PRODUCTS</i> ..... | 189 |
| <i>TABLE 57 (CONTINUED)</i> .....                            | 190 |
| <i>TABLE 57 (CONTINUED)</i> .....                            | 191 |