

**B-1**

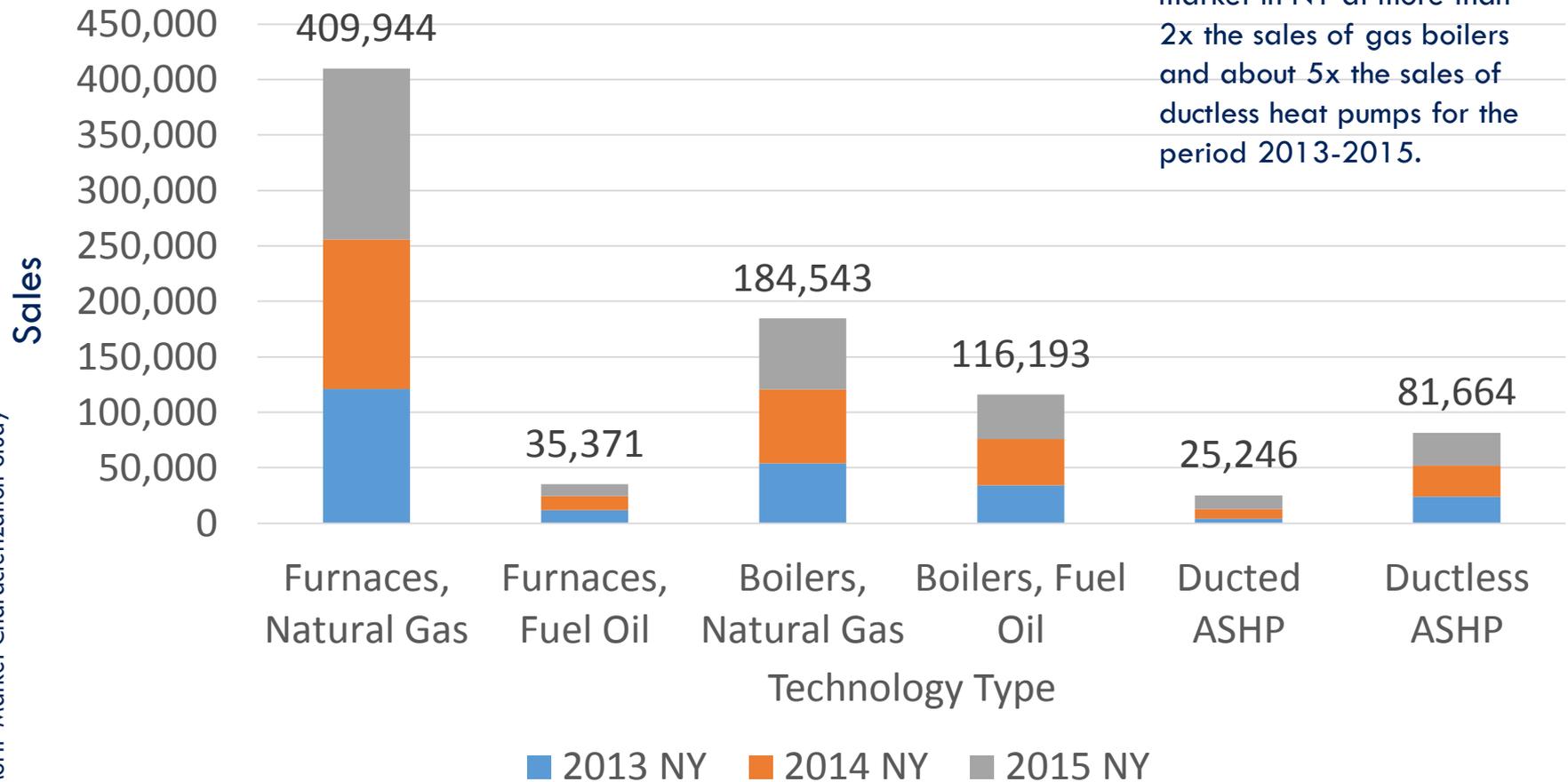
# Appendix B - Secondary Research - HARDI Data Analysis

# HVAC Sales by Technology for New York State

B-2

Summary of Secondary Research

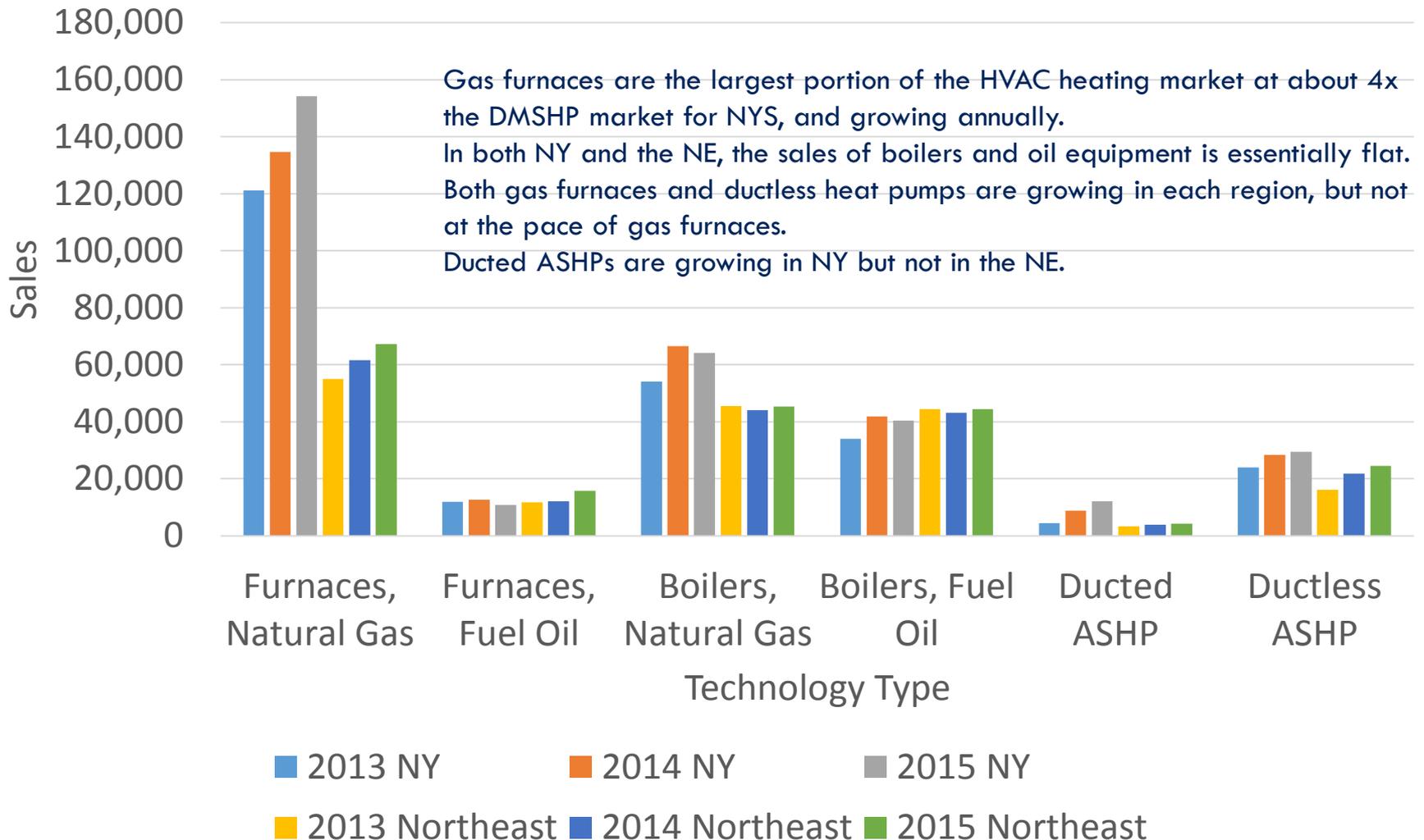
Gas furnaces dominate the market in NY at more than 2x the sales of gas boilers and about 5x the sales of ductless heat pumps for the period 2013-2015.



# HVAC Sales by Technology Trends for 2013-2015 for New York State and Northeast (w/o NY)

B-3

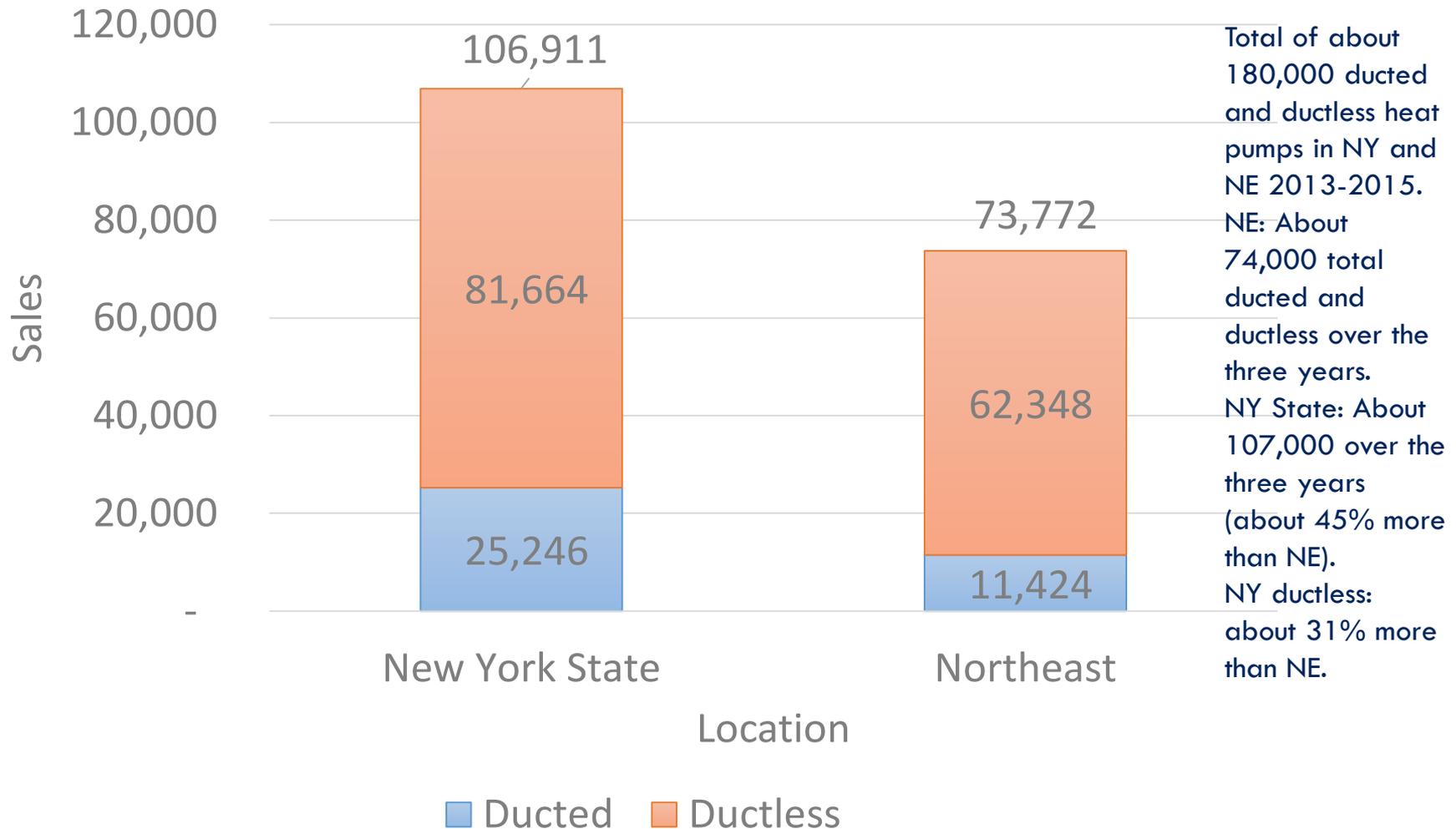
## Summary of Secondary Research



# Ducted and Ductless Air Source Heat Pumps Sold in New York State and the Northeast (w/o NY) 2013-2015

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NYSERDA Ductless Mini-split Heat Pump Market Characterization Study

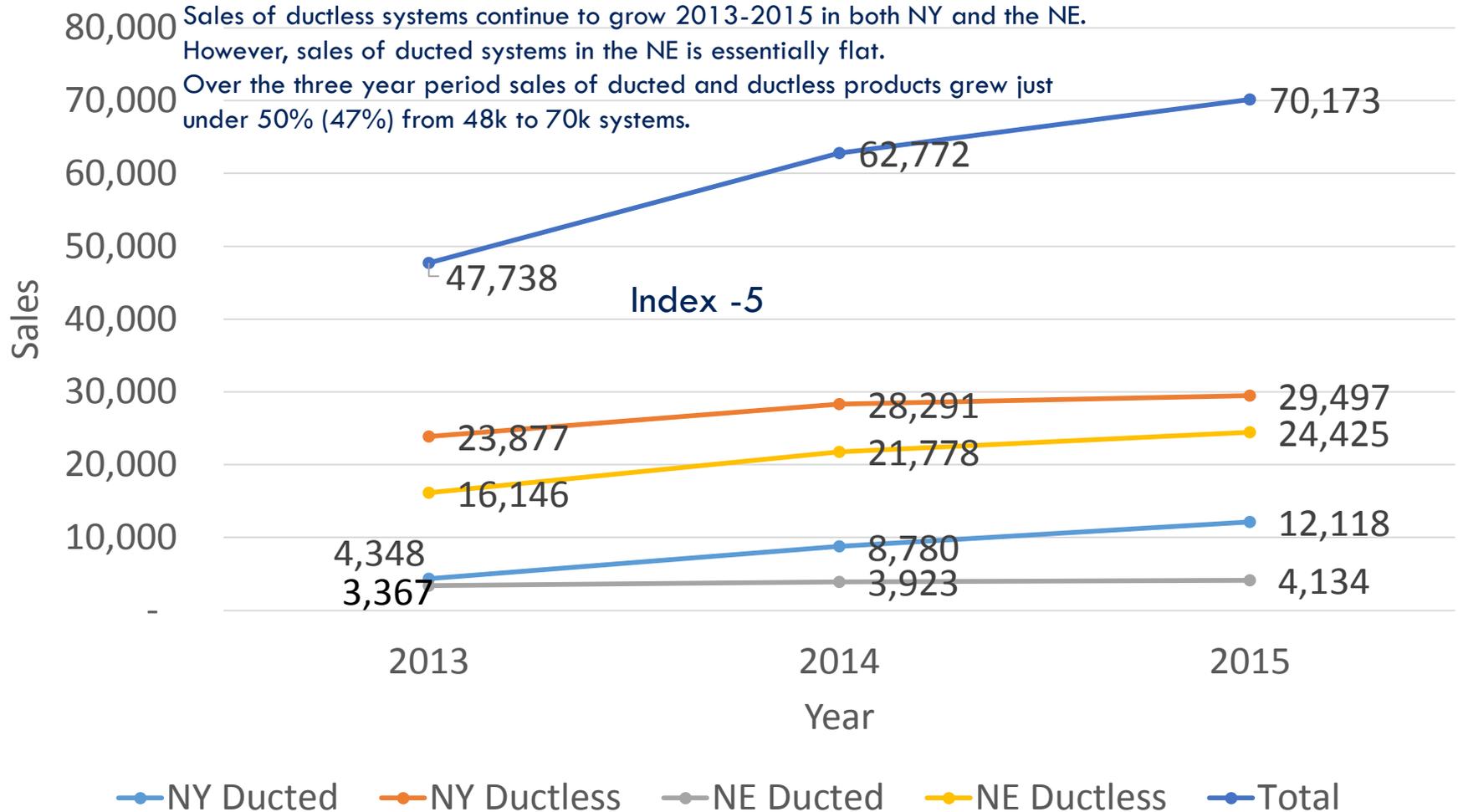


# Ducted and Ductless Air Source Heat Pumps Sold in New York State and the Northeast (w/o NY) 2013-2015

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## Summary of Secondary Research

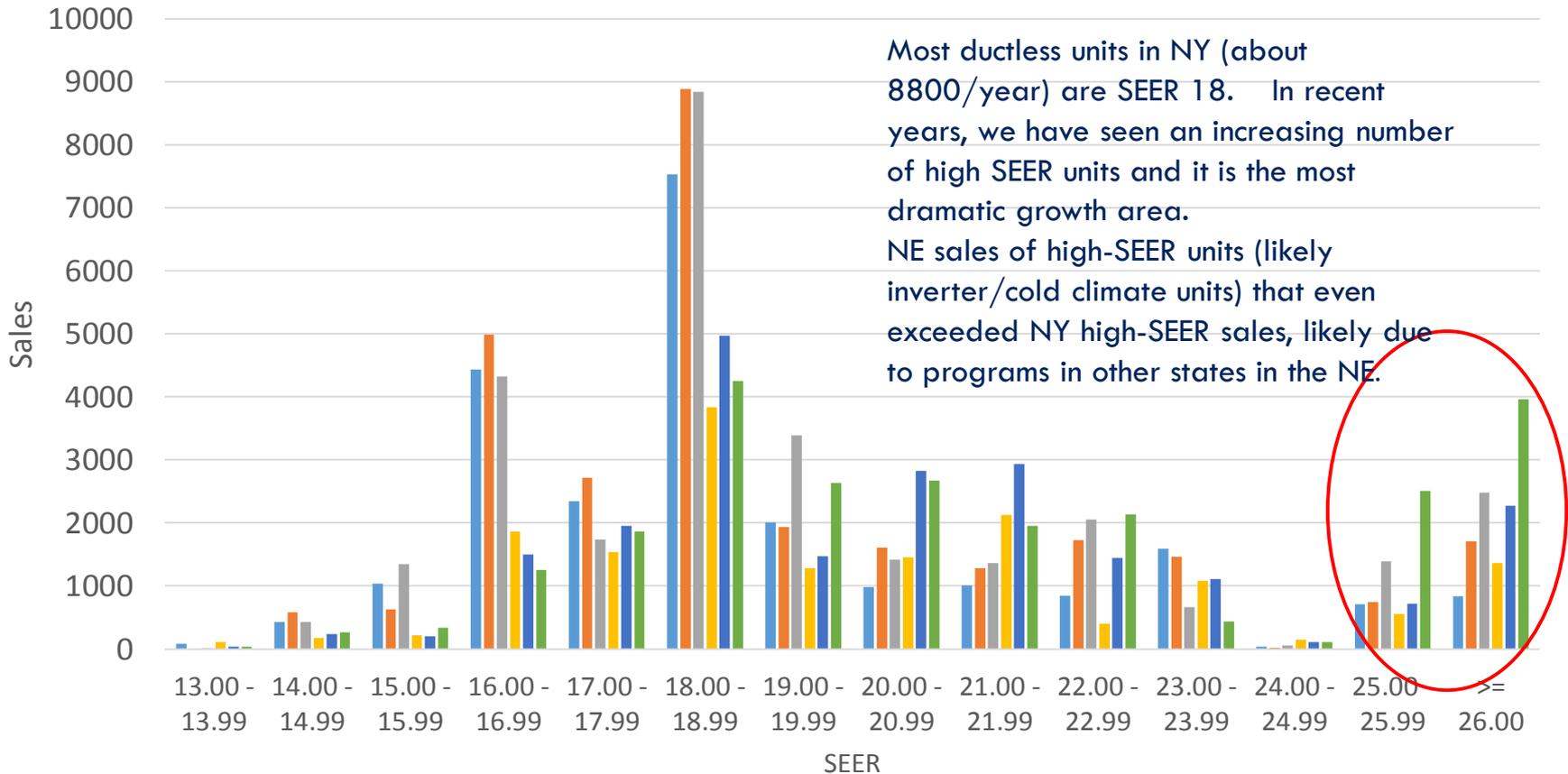
Sales of ductless systems continue to grow 2013-2015 in both NY and the NE. However, sales of ducted systems in the NE is essentially flat. Over the three year period sales of ducted and ductless products grew just under 50% (47%) from 48k to 70k systems.



# Air Source Heat Pumps, Ductless - Number of Sales by SEER 2013 -2015 for NY State and the Northeast (w/o NY)

B-6

## Summary of Secondary Research



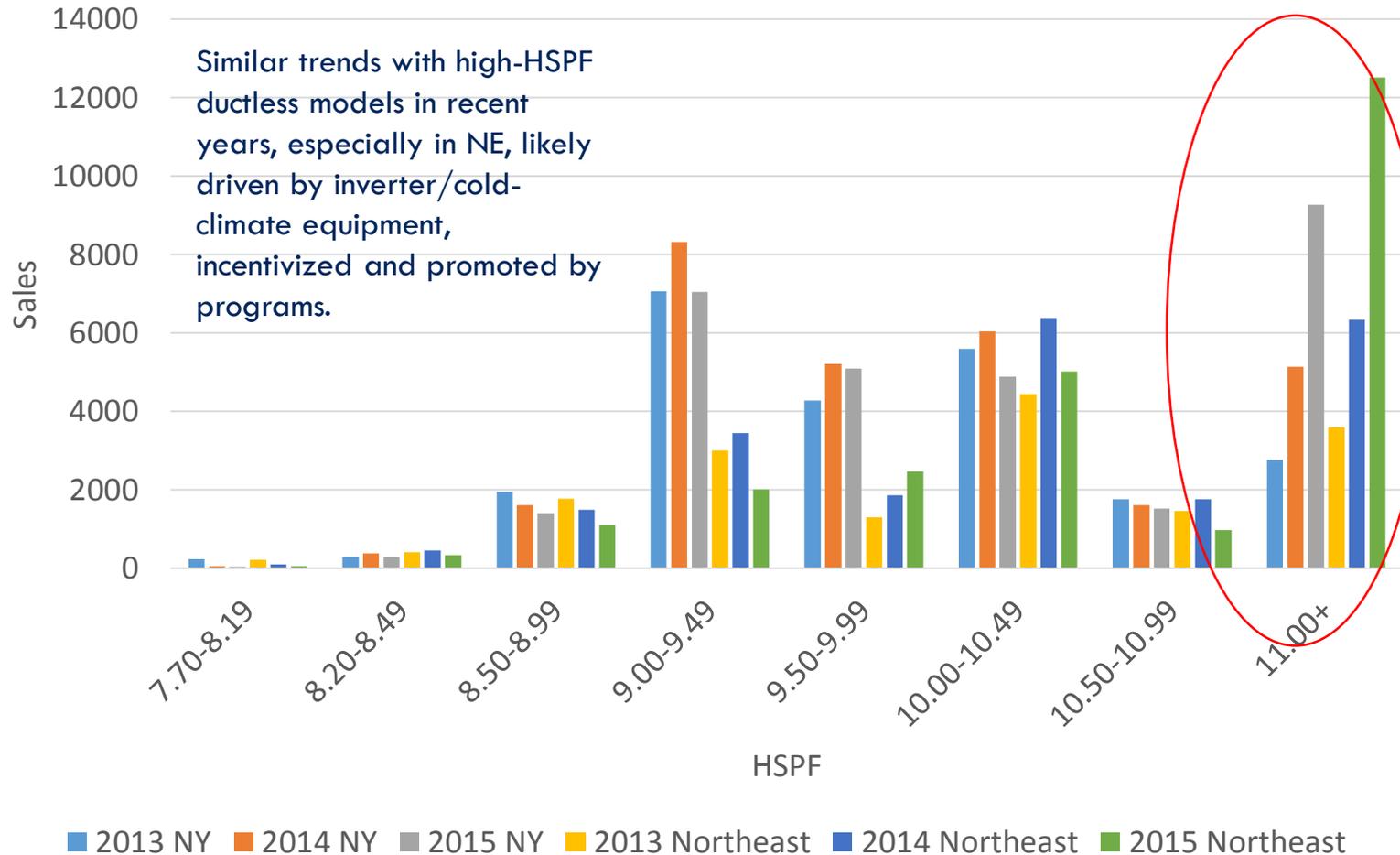
■ 2013 NY ■ 2014 NY ■ 2015 NY ■ 2013 Northeast ■ 2014 Northeast ■ 2015 Northeast

Highlight - In recent years, most dramatic growth area has been at highest SEER levels

# Air Source Heat Pumps (Ductless) Sales by HSPF, 2013 - 2015 for NY State and the Northeast (w/o NY)

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## Summary of Secondary Research



**Highlight - In recent years, most dramatic growth area has been at highest HSPF levels**

# Air Source Heat Pumps (Ductless) Sales by Capacity, 2013 -2015 for NY State

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## Summary of Secondary Research

