

FLUOROCARBONS IN THE US ECONOMY

PRODUCTIVITY

COMFORT

FOOD SAFETY

HEALTH

LIFE SAFETY

EFFICIENCY

Economic contributions of the US fluorocarbon industry and end-user industries:

- NEARLY 730,000 JOBS
- \$32 BILLION IN PAYROLL
- \$158 BILLION IN SHIPMENT AND SERVICES TO THE COUNTRY'S ECONOMY¹

Fluorocarbon products include hydrofluorocarbons (HFCs), hydrochlorofluorocarbons (HCFCs), perfluorocarbons (PFCs) and other mixed halocarbons that contain fluorine. They are sold and incorporated into products ranging from air conditioning and refrigeration to metered dose inhalers (MDIs) in the pharmaceutical industry.

In addition to manufactured products, there are important service industries providing repair and maintenance services, including fluorocarbon recovery and replacement services in conjunction with other repairs. Distribution and installation of air conditioning and refrigeration systems involve wholesalers and contractors that represent another significant area of economic activity directly dependent on fluorocarbon-containing equipment.

Industries that produce & utilize fluorocarbons include:

- FLUOROCARBON PRODUCERS
- END-USER INDUSTRIES

Refrigeration & Air Conditioning Equipment

- Commercial Repair & Maintenance
- Wholesalers
- Contractors

Household Appliances

- Appliance Repair & Maintenance

Motor Vehicle Air Conditioning Equipment

- Automotive A/C Service

Polystyrene Foams

Medical – Metered Dose Inhalers

Aerosols

Fluoropolymers & Process Agents

Urethane Foams

Fire Protection

Semiconductors

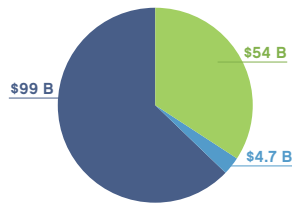
Halogenated Solvents

Reclaim, Recycle & Destruction

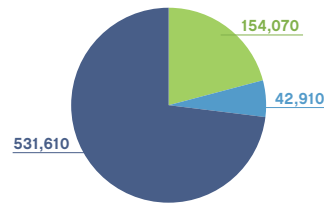
Economic Value of US Fluorocarbon Producers and End-User Industries

■ Manufacturing ■ Repair & Maintenance ■ Wholesale & Contracting

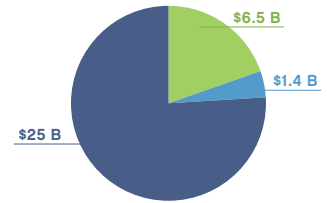
SHIPMENTS / SERVICES



EMPLOYEES



PAYROLL



Manufacturing

Manufacturing industries at large comprise \$54 billion in shipments and services with 154,070 employees earning \$6.5 billion.

Fluorocarbon Gas Manufacturing

Shipments / Services: \$1.2 B
Employees: 1,400
Payroll: \$100 M

Refrigeration & Air Conditioning Equipment Manufacturing

Shipments / Services: \$26.3 B
Employees: 89,000
Payroll: \$3.5 B

Household Appliance Manufacturing

Shipments / Services: \$7.3 B
Employees: 18,000
Payroll: \$750 M

Motor Vehicle Air Conditioning Equipment Manufacturing

Shipments / Services: \$5.1 B
Employees: 17,000
Payroll: \$750 M

Foam Manufacturing

Shipments / Services: \$4.9 B
Employees: 18,000
Payroll: \$650 M

Medical – MDIs

Shipments / Services: \$5.1 B
Employees: 6,000
Payroll: \$400 M

Aerosols

Shipments / Services: \$1.3 B
Employees: 3,000
Payroll: \$200 M

Fluoropolymers and Process Agents

Shipments / Services: \$2.7 B
Employees: 3,000
Payroll: \$200 M

Repair & Maintenance

Repair and maintenance activities add \$4.7 billion in services, with a large labor component of 42,910 employees and a \$1.4 billion payroll.

Commercial & Household Repair & Maintenance

Shipments / Services: \$2 B
Employees: 17,000
Payroll: \$640 M

Automotive AC Service

Shipments / Services: \$2.6 B
Employees: 25,000
Payroll: \$750 M

Wholesale & Contracting

At the wholesale and contracting level of the industry, the total shipments and services add another \$99 billion to the total, with a very large labor force of 531,610 employees earning almost \$25 billion.

Air Conditioning Wholesalers

Shipments / Services: \$18 B
Employees: 32,000
Payroll: \$1.7 B

Air Conditioning Contractors

Shipments / Services: \$81 B
Employees: 500,000
Payroll: \$23 B

Residential Air Conditioning Presence

In 2011, 88% of all new single-family homes in the US were constructed with central air conditioning. By comparison, of all single-family homes newly completed in 1973, only 49% featured air conditioning.

The number of occupied housing units with central air conditioning has grown steadily from 18,491,000 in 1978, or 24% of total occupied housing, to 72,808,000 in 2009, or 65.1% of total occupied housing.ⁱⁱ

ⁱ Steed, Joseph M. US Fluorocarbon Industry Economic Analysis Report. April 29, 2013.

ⁱⁱ Air-Conditioning, Heating, and Refrigeration Institute. HVACR & Water Heating Industry Statistical Profile. 2012.



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The Alliance is an industry coalition that was organized in 1980 to address the issue of stratospheric ozone depletion. It is presently composed of about 100 manufacturers and businesses which rely on HCFCs and HFCs.

Today, the Alliance is a leading industry voice that coordinates industry participation in the development of international and U.S. government policies regarding ozone protection and climate change.