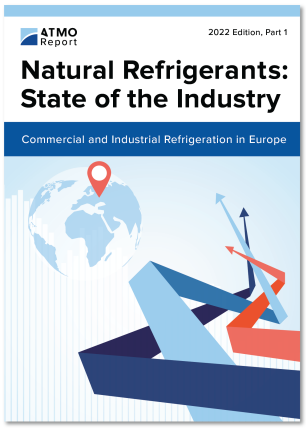
ATMOsphere Estimates 55,000 Stores Using Transcritical CO2 Refrigeration In Europe

September 2022: 55,000 stores with transcritical CO2 refrigeration in Europe, including 50,000 using a centralized system and 5,000 using condensing units.



Natural Refrigerants State of the Industry 2022

BRUSSELS, BELGIUM , October 20, 2022 /EINPresswire.com/ -- Based on a survey of key OEMs, market accelerator ATMOsphere estimates that, as of September 2022, there are 55,000 stores with transcritical CO2 refrigeration systems in Europe, including 50,000 using a centralized system (racks) and 5,000 using condensing units.

In addition, the number of industrial sites, including cold storage and food processing facilities, with transcritical CO2 systems in Europe, as of September 2022, is estimated to be 2,000.

> We hope that this annual State of the Industry report will provide evidence of the strength of the natural refrigerants market in Europe and an understanding of the global marketplace."
>
> *Marc Chasserot, CEO of ATMOsphere.*

ATMOsphere's analysis of the market size for European commercial and industrial sites using natural refrigeration equipment is contained in its new report, "Natural Refrigerants: State of the Industry, Commercial and Industrial Refrigeration in Europe, 2022 Edition, Part 1." ATMOsphere is a leading market accelerator for natural refrigerants and clean cooling and heating solutions.

The report is available for free here.

In January, ATMOsphere will publish the second part of the 2022 report, covering the markets in North America and Japan.

The 55,000 European stores using transcritical CO2 represent a food retail market penetration of

18.4% out of an estimated market of 299,025 food retail stores in Europe.

The total number of European sites (stores and industrial) using transcritical CO2 systems as of September 2022, 57,000, represents a 42.5% gain from the 40,000 such sites estimated in March 2021.

The report also estimated there will be 2.9 million hydrocarbon self-contained display cases installed at European stores by the end of 2022, a net increase of about 200,000 cases from June 2021.

In addition, the number of industrial facilities with low-charge ammonia systems as of September 2022 is estimated to be 2,850.

Key Trends

The report also describes the key policy, technology and market trends impacting the European natural refrigerants marketplace.

For example, the grocery retail market since 2021 has been shaped by the ongoing effects of the COVID-19 pandemic, the gradual reopening of the hospitality sector, the emergence of instant delivery (quick commerce) players and price inflation. COVID-19's impact on the supply chain has generally caused delays, but not cancellations, of new refrigeration equipment and store construction.

In 2022, the Russian invasion of Ukraine has had a pronounced impact on the food and refrigeration sectors, exacerbating supply chain issues and inflation.

At the same time, due to increase lead times and the challenge in maintaining the quality of perishable products, companies are relying more on cold storage warehousing to improve a product's life cycle.

The EU F-gas Regulation of HFCs continues to have the biggest influence on natural refrigeration adoption. The European Commission (EC) on April 5, 2022, released its long-awaited proposal updating the EU F-gas Regulation with measures to further clamp down on HFC use in the EU, opening up more opportunities for natural refrigerants.

In a move with major implications for the European HVAC&R industry, five European countries – Germany, the Netherlands, Norway, Sweden and Denmark – announced in July 2021 their intention to submit a joint proposal to restrict per- and polyfluorinated alkyl substances (PFAS), including some HFC and HFO refrigerants, to the European Chemicals Agency (ECHA) under the REACH regulation. ECHA will consider the proposal in January 2023, and the EC is expected to make a decision during 2025. Meanwhile, the uncertainty will hurt HFOs and help natural refrigerants, the report notes.

In addition, Europe continues to adjust to its new energy label for appliances while taking steps toward its 2050 Climate Neutrality target. All of this should support the adoption of natural refrigerant systems, says the report.

Other trends helping the adoption of natural refrigerants include the rise of online shopping and the growth of the frozen and fresh foods market.

Additional positive trends include advancements in digitalized monitoring, greater technician training options, the advent of cooling-as-a-service and Clean Cooling.

Each of the three main natural refrigerants is experiencing trends of their own. CO2 is benefitting from aggressive adoption by market leaders in food retail, the implementation of technologies that improve the efficiency of transcritical systems in warm climates, the rise of integrated systems, the use of CO2 in small stores and the adoption of CO2 in industrial refrigeration. Meanwhile hydrocarbon cases are finding a myriad of uses in stores, some of which are implementing them throughout the sales floor, and ammonia is being reinvented in low-charge systems.

About ATMOsphere

For the past 20 years, market accelerator ATMOsphere (formerly shecco) has been active in helping bring climate-friendly technologies faster to market. ATMOsphere supports over 100 partners worldwide in the HVAC&R sector, where the focus is on sustainable refrigeration, heating & cooling technologies using natural refrigerants. For more information see https://atmosphere.cool

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