

ATMOsphere Releases 2023 Market Report Showing Growth of Natural Refrigerants

The release of the annual report coincides with COP28 in Dubai, the first COP meeting to highlight sustainable cooling.

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ATMOsphere, a global market accelerator for natural refrigerants, has released its 2023 Market Report, "Natural Refrigerants: State of the Industry/Refrigeration in Europe, North America and Japan, Plus Heat Pumps in Europe," with data showing the growth of installations in commercial and industrial applications in North America, Europe and Japan.

The report can be downloaded for free [here](#).

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We consider this report to be the world's leading resource for information on the installations and penetration of natural refrigeration in the commercial and industrial sectors.”

*Marc Chasserot, ATMOsphere
Founder and CEO*

The release of the annual report coincides with the 28th Conference of the Parties (COP28) to the United Nations Framework Convention on Climate Change (UNFCCC), which runs from November 30 to December 12 in Dubai, United Arab Emirates. At the event [representatives of ATMOsphere](#) will highlight the report in supporting the global adoption of clean cooling and heating technologies with natural refrigerants alongside the launch of the [Global Cooling Pledge](#).

“Our 2023 Market Report will contribute to the conversation in Dubai and worldwide by providing the latest insights and data on natural refrigerant-based

commercial and industrial refrigeration systems in several key markets – Europe, the U.S., Canada and Japan,” said Marc Chasserot, Founder and Publisher of ATMOsphere.



2023 ATMO Market Report NatRefs

The report provides installation data as of December 2023 for transcritical CO2 and low-charge ammonia systems and hydrocarbon retail cabinets in Europe and North America (U.S. and Canada), and transcritical CO2 in Japan, as well as (for the first time) hydrocarbon chillers in Europe and natural refrigerant (mostly hydrocarbon)-based domestic heat pumps in Europe.

The report shows that in the past year there has been exceptional growth for transcritical CO2 installations in both stores and industrial sites in major markets throughout the world. In Europe, the leading market, as of December 2023 there were approximately 68,500 food retail stores that use transcritical CO2 systems as well as 3,300 industrial sites using this technology; this represents a total of 71,800 transcritical CO2 sites in Europe, an increase of 26% from the previous year.

The reports also found growth in installations of low-charge ammonia systems and hydrocarbon retail cabinets in Europe and North America.

Among the drivers of natural refrigerant-based refrigeration adoption described in the report, regulatory action has had the most to do with it. In Europe, as explained in the report, the F-gas Regulation, already a major spur to natural refrigerant adoption, has been upgraded this year, making f-gases an even less attractive option. The EU's ongoing consideration of restrictions on PFAS, which is defined to include HFOs, only serves to further accelerate the move toward natural refrigerants.

In the U.S., the rollout of the AIM Act, especially its Technology Transitions piece, has sparked long overdue interest in natural refrigerants by large supermarket chains. The restrictions on 150+ GWP refrigerants in the AIM Act have already led to considerable adoption of CO2 and hydrocarbon equipment in California, where these limits were enacted in 2020; they are now having a similar effect on a national level. But unlike Europe, the U.S. government has yet to make the connection between PFAS and f-gases.

In Japan, the government's natural refrigerant subsidy program has been a major driver of adoption.

This report also delves into the many other factors impacting the uptake of natural refrigerants, both on a global and regional level. Worldwide, technological improvements continue to make transcritical CO2 applicable in all climates and in integrated HVAC&R formats, while lowering the charge levels of ammonia systems and boosting the efficiency of hydrocarbon cases.

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