

ATMOsphere Releases 2024 Market Report Showing Global Growth of Natural Refrigerants

The report covers commercial and industrial refrigeration in Europe, North America, Japan, Australia, New Zealand and Latin America.

BRUSSELS, BRUSSELS , BELGIUM, February 6, 2025 /EINPresswire.com/ -- [ATMOsphere](#) has released its 2024 Market Report, "Natural Refrigerants: State of the Industry/Refrigeration in Europe, North America, Japan, Australia, New Zealand and Latin America."



The report focuses on commercial and industrial refrigeration. In the commercial sector, data was collected on the number of stores using transcritical CO₂ (R744) racks and condensing units and the number of installed self-contained hydrocarbon (mostly propane/R290) cabinets. For industrial refrigeration, data was gathered on the number of industrial sites using low-charge ammonia (R717) and transcritical CO₂ systems, as well as hydrocarbon chillers in Europe.

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The market for commercial and industrial refrigeration has moved to natural refrigerants – and there is no going back.”

*Marc Chasserot, ATMOsphere
Founder and CEO*

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

“This is most evident in Europe, but is also starting to be seen around the world. In this year’s report, we not only focus on the markets we have traditionally covered – Europe, North America and Japan – but also Australia/New Zealand and Latin America, which have been slowly but surely embracing CO₂, propane and ammonia in

commercial and industrial refrigeration.”

Growth in established markets

The 2024 Market Report details the global growth of natural refrigerants in Europe, North America (the U.S. and Canada) and Japan.

Highlights from the commercial sector (all figures are estimations made as of December 2024) in these regions include:

- Transcritical CO₂ racks and condensing units have been installed in 90,700 stores in Europe, good for a market penetration of 30%. In addition, there are 17 million self-contained hydrocarbon cabinets installed in European food retail stores.
- A total of 4,100 supermarkets and grocery stores use transcritical CO₂ systems in North America, 2,800 stores in the U.S. and 1,300 in Canada. In addition, there are 3.6 million self-contained hydrocarbon cabinets installed in the U.S. and 800,000 in Canada.
- In Japan, 11,500 transcritical CO₂ systems (mostly condensing units) were installed in convenience stores, reaching a market penetration of 20%.

Highlights from the industrial sector include:

- The number of industrial sites using transcritical CO₂ systems in Europe grew from 3,300 in 2023 to 4,900 in 2024.
- In North America there were 1,230 low-charge industrial sites using low-charge ammonia systems, with the total number of sites using packaged units growing 38% year-over-year.
- In Japan, there were 470 industrial sites using transcritical CO₂ systems, a growth of 17% year-over-year.

Strong foundations in emerging markets

In Australia/New Zealand and Latin America, the story is not about growth but rather about the strong foundations that have been laid in the commercial sector. In Australia and New Zealand, there are 330 and 240 supermarkets and grocery stores, respectively, using transcritical CO₂ systems. In Australia, this is a market penetration of 7.7%, while in New Zealand it is 22%.

In Latin America, a region defined in the report as encompassing 20 countries, there are 580 grocery stores and supermarkets using transcritical CO₂ systems. Ecuador stands out as an early adopter, with its 125 store installations accounting for a 13% market penetration. Another major insight from Latin America is the widespread use of self-contained hydrocarbon cabinets, with 2.6 million installed in Mexico and 5.9 million installed in Central and South America.

In addition to installation data, the 2024 Market Report also covers regulatory developments related to f-gases, PFAS (per- and polyfluoroalkyl substances) and TFA. Data from the report will be presented at HVAC&R trade shows around the world, including the AHR Expo, IIAR and FMI Energy in the United States along with ISH in Germany and the Supermarket Trade Show in Japan. In addition, insights from the report will be shared at upcoming ATMO Conferences in

Latin America, Australia, the U.S. and Europe.

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 and cooling technologies using natural refrigerants.

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