



business case

natural refrigerants

25 & 26 June 2015 — Atlanta, Georgia

State of the Industry - Introduction

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the industry is changing ...



NR in the food service industry



MEXICO

188,371

159,307

HC

29,064

CO₂



U.S

94,493

77,000

HC

17,493

CO₂



CANADA

8,172

3,797

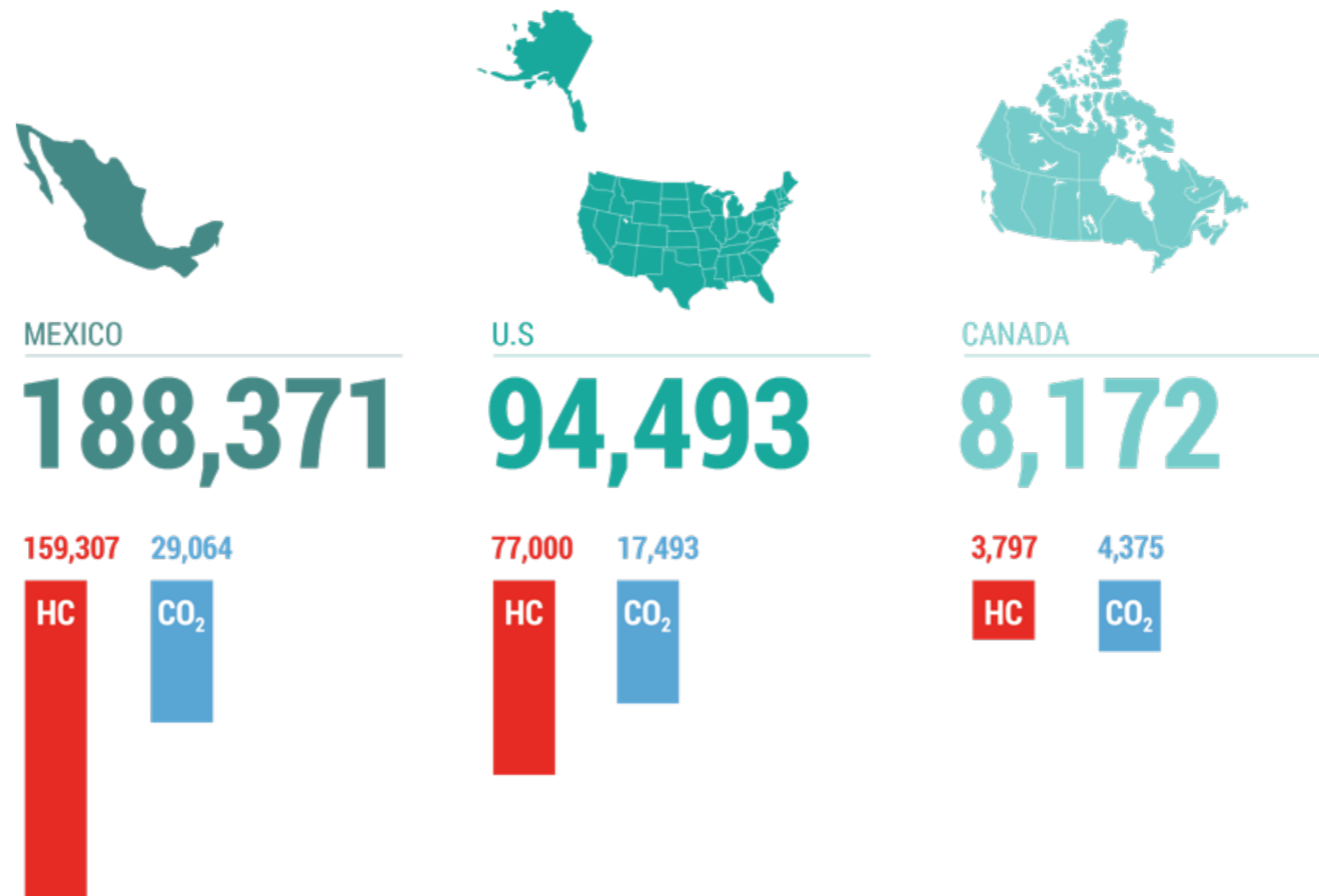
HC

4,375

CO₂



NR in the food service industry



the NR food service sector is one of the most dynamic ones in North America

from being non-existent a short while ago it now already features “internal competition” between NR

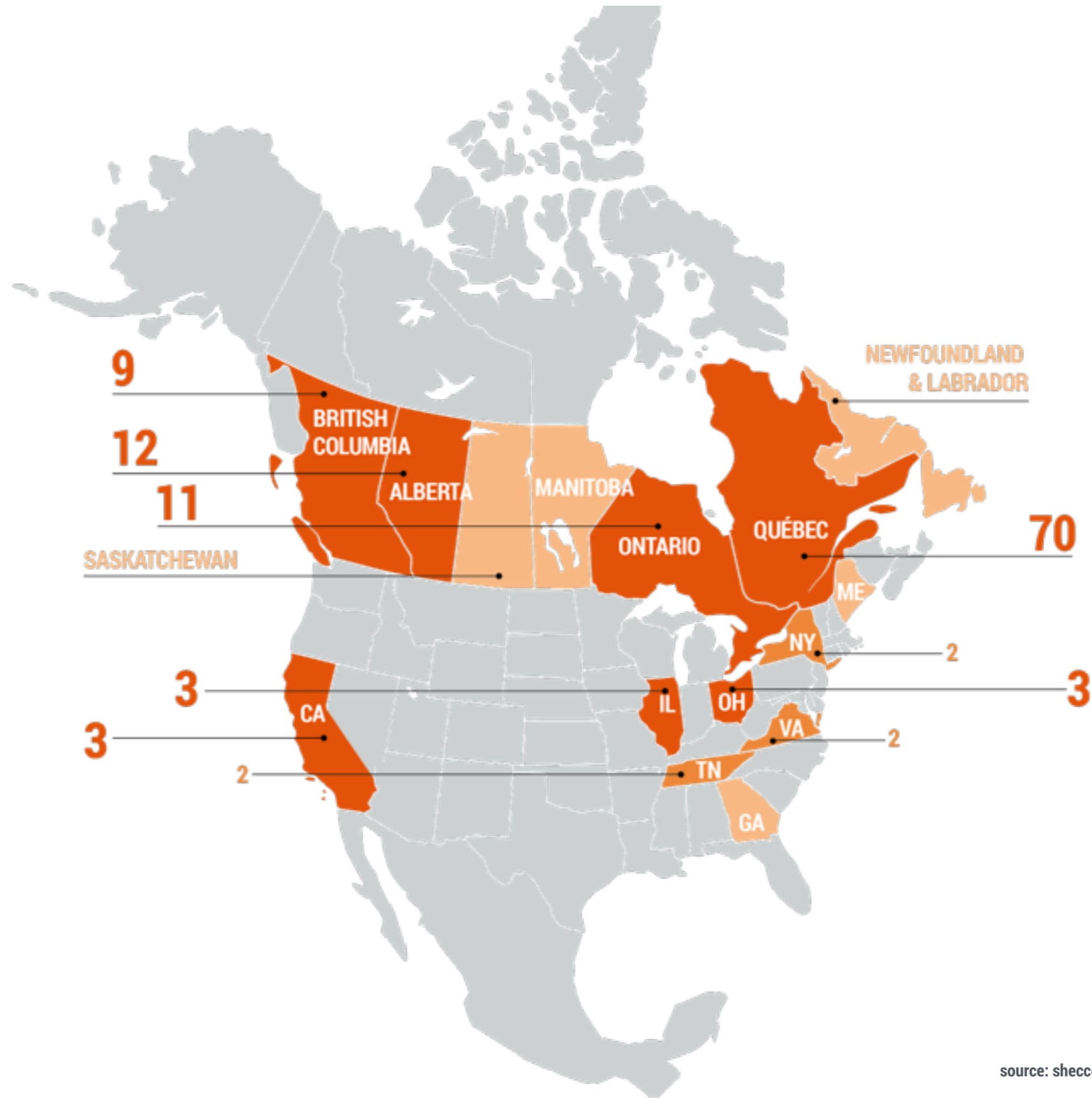
the market in NA will further accelerate, with market & regulatory changes

CO₂ transcritical stores



105
CANADA

17
U.S.



KEY/LEGEND
● N/A ● 1 ● 2 ● 3+

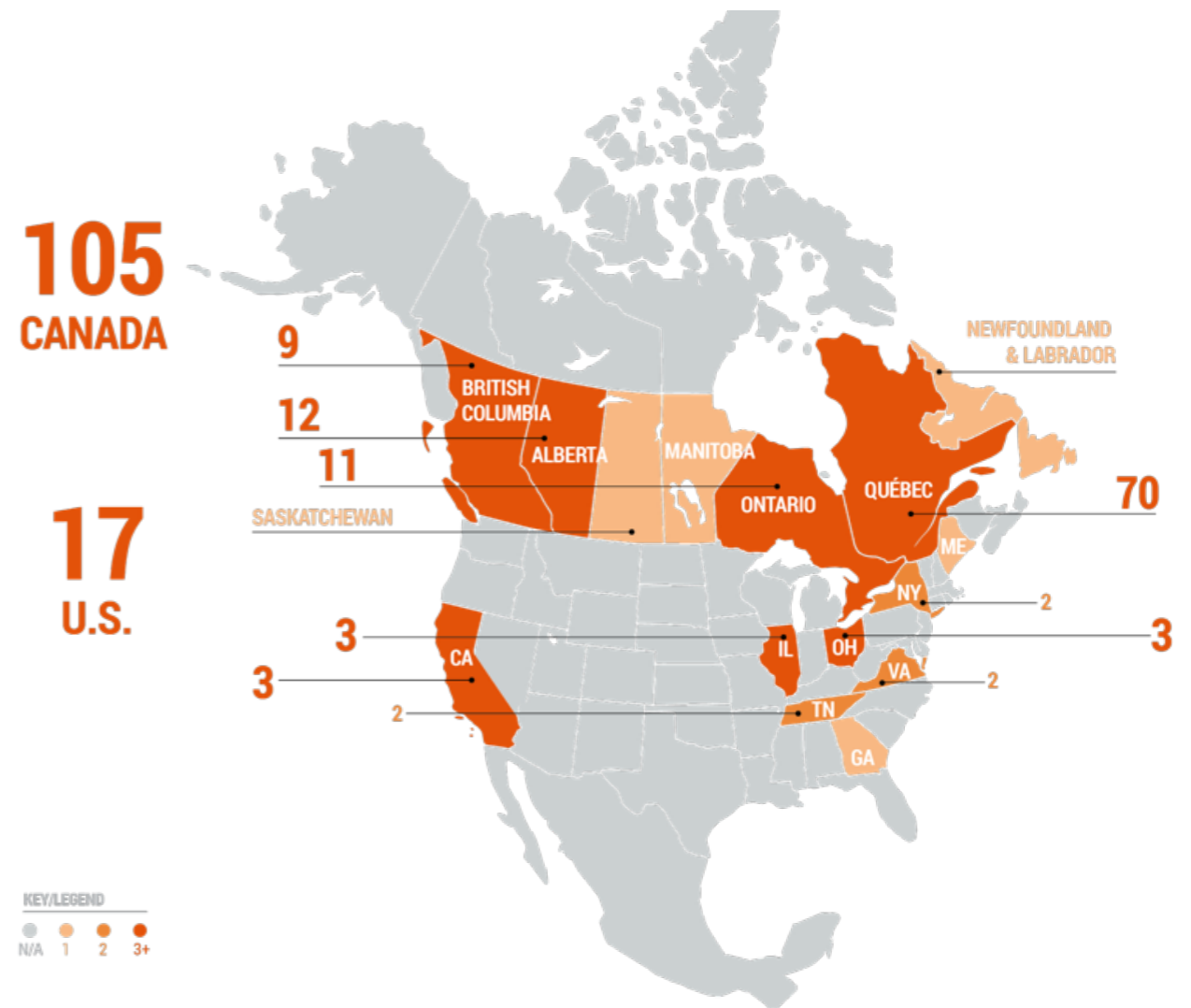
CO₂ transcritical stores



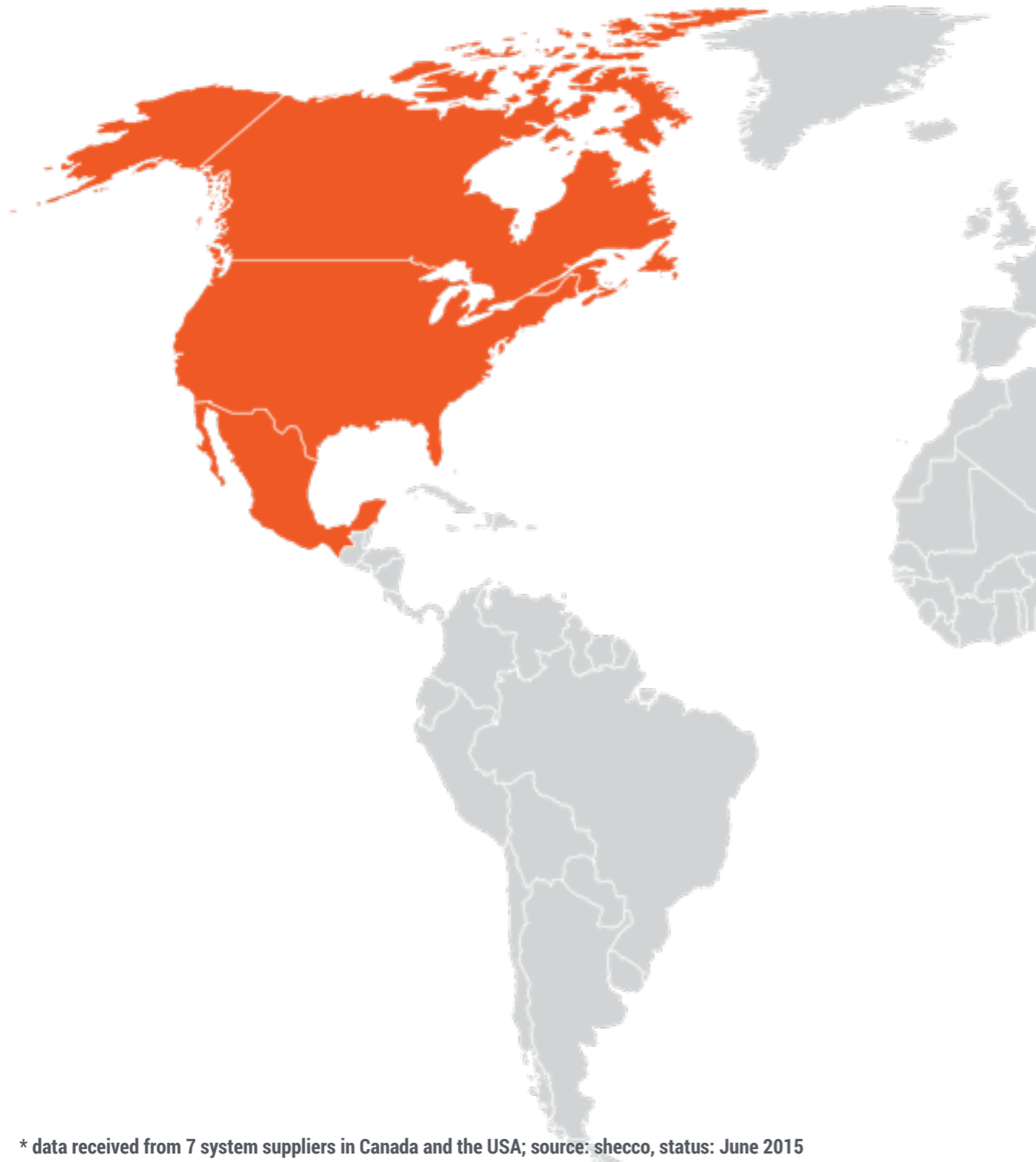
120+ CO₂-only stores can be found in North America today

the use is mostly confined to northern regions

where there is a clear commitment from food retailers the market grows rapidly



NR in industrial refrigeration



“the industry changed more in the last 5 years than it did in the 20 years before”

move towards low-charge NH_3

use of CO_2 in cascade / secondary NH_3 - CO_2 systems

use of CO_2 transcritical systems

move towards more energy-efficient equipment

overall: **minimum 261 next-generation NR installations in North America***

* data received from 7 system suppliers in Canada and the USA; source: shecco, status: June 2015



state of the industry

AND WHAT ARE THE TRENDS
YOU OBSERVE?