



Press release

shecco launches 2nd GUIDE Europe tracking upswing of natural refrigerants market

Brussels, 13 January 2014: Kicking off its 2014 activities, shecco has launched the 2nd edition of its popular GUIDE Europe, titled "GUIDE 2014: Natural Refrigerants - Continued Growth and Innovation in Europe". The nearly 200 page-long publication provides an essential update on the market evolution of HVAC&R applications using CO₂, ammonia, hydrocarbons, water and air. Featuring data on the latest market trends, a business directory of over 400 companies working with natural refrigerants in Europe, brand new supermarket maps, and survey results from 376 European HVAC&R industry experts, the GUIDE EU 2014 aims to build on the success of the 2012 edition and become THE industry reference tool for those working with natural working fluids.

"Today shecco is pleased to launch its updated, free, market intelligence report, the GUIDE Europe 2014. Once again focusing on Europe, the market leader for natural refrigerant-based HVAC&R technologies, the updated GUIDE shows how quickly things are evolving, and that natural refrigerants are becoming a standard solution for companies that want to future-proof their business," says Marc Chasserot, GUIDE series publisher and shecco Managing Director.

Why update the GUIDE Europe?

The last two years have seen considerable changes in the European natural refrigerant market. Tracking the upswing in natural refrigerant investments the updated GUIDE Europe lists more than 400 companies active in providing natural refrigerant-based solutions, products and services across Europe. Other special features include the first ever cascade supermarket maps quantifying the number of CO₂ secondary and cascade installations, as well results from a 2014 survey of European HVAC&R industry experts.

"We are publishing the GUIDE EU 2014 at a point in time when proposed European-level rules on the restricted or banned use of f-gases are expected to take effect. They will determine the direction that HVAC&R system and component suppliers, contractors and training institutes, but more importantly commercial and industrial end-users, will be taking in their refrigerant choice until 2020 and beyond. The second edition of the GUIDE Europe allows for a better understanding of the opportunities in the natural refrigerant market," adds Nina Masson, shecco Head of Market Research and lead author.

Free to all readers

The GUIDE Europe 2014 is freely available at <http://publications.shecco.com/publications/view/2014-guide-natural-refrigerants-europe>

The report can be viewed online as a flash version, downloaded as a whole publication or only as the individual case studies.

Inside the GUIDE Europe 2014

Highlights of the new GUIDE include:

- **European Industry Survey** - summarises the results from 367 HVAC&R industry experts responding to an open survey running until November 2013. The Survey provides an in-depth overview of natural refrigerant use by application sector and response group, and expectations for the total market share of NR solutions across Europe in 2020.
- **The European Market Today & Tomorrow** - investigates the commercial availability of natural refrigerant solutions in the market from 2013 to 2025.
- **Policy: European & National Perspective** - provides an analysis of selected policy initiatives in Europe, among them the new proposed changes to the F-Gas Regulation that have an impact on the HVAC&R industry in general and the uptake of natural refrigerants in particular; and discusses best practice policy initiatives at the national level in selected European countries.
- **Natural Refrigerants in the European Food Chain / Market & Technology Maps** - examines and depicts the market for commercial CO₂ transcritical refrigeration systems, a market that is quickly gaining further momentum in Europe. shecco's completely updated supermarket map shows an increase of 117% in the number of CO₂ transcritical supermarkets within two years. The more than 480,000 hydrocarbon plug-in supermarket cabinets in operation also prove the market viability of other natural solutions. A world map shows where more than 5,000 stores using CO₂ transcritical and cascade/secondary refrigeration systems are located.
- **End-User Views** – lists public statements from leading food retailers and consumer goods brands on natural refrigerants in light-commercial refrigeration, as well as in commercial refrigeration generally, and in warm climates and convenience stores.
- **Case Studies** - best practice examples of where natural refrigerants (NR) are used in Europe today. This chapter includes a collection of real-life success stories, clear examples of cost & energy savings, environmental advantages and technology benefits of NR systems.
- **European Natural Refrigerant Business Directory** - presents more than 420 European-based companies involved in the natural refrigerants business.

Upcoming GUIDEs

The coming months will see the launch of GUIDEs for China, Japan and an update on the North American market.

About shecco

For more than a decade marketing & communications expert shecco has been active in helping bring climate friendly technologies faster to market. shecco supports over 100+ partners worldwide in two areas: the HVAC&R sector, where the focus is on sustainable refrigeration, heating & cooling technologies using natural refrigerants; and the transport sectors where an emphasis is put on electric vehicles (cars, heavy duty vehicle, scooters, bikes). shecco offers a variety of services, ranging from world-leading online industry platforms, to market research & consultancy services, events management, funding & grants support, and public affairs.

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