



Press release

shecco publishes first-ever comprehensive GUIDE to Natural Refrigerant market in China

Brussels, 20 May 2015 - shecco has published the first in-depth report on a highly dynamic market for natural refrigerants in its '[GUIDE to Natural Refrigerants in China - State of the Industry 2015](#)'. The report, done in collaboration with the Chinese Association of Refrigeration (CAR), is shecco's 5th large publication about a world region's potential for f-gas free substances in heating and cooling, and the largest in terms of industry views captured in a country-wide survey. Exclusive information on current and future trends in China is presented in a new-look GUIDE designed with info graphics that clearly explain key market trends.

shecco is proud to announce the next in its series of market-leading GUIDEs about the business and technology potential of natural refrigerants in one of the world's most dynamic markets. Not only does the report present results from the largest-ever survey of China's natural refrigerants market capturing nearly 1,100 responses from the HVAC&R industry active in China, but it also features a range of market maps showing the distribution of natural refrigerants across various sectors, as well as exclusive interviews.

Why a GUIDE China?

The last three years have seen a remarkable transformation of China's natural refrigerant market. The favourable business and policy climate for both domestic and foreign companies is driving greater uptake of CO₂, ammonia, hydrocarbons and water as refrigerants.

"The overall message is clear: China has started building the right tracks to be a major market supplier and demander for natural refrigerants in the coming five years, and for sure in the run-up to a global HCFC phase-out by 2030," says Nina Masson, Deputy Managing Director shecco and lead author.

"We decided to launch this GUIDE to capture the dominant trends affecting the uptake of more sustainable, future-proof refrigerants and technology solutions. China's role as a large domestic market with rising living standards and its export capabilities to the global HVAC&R industry will be of utmost importance to advance the use and production of more sustainable heating, refrigeration and air conditioning systems," Masson adds.

GUIDE China highlights

This GUIDE provides a clear analysis of the progress China has made and outlines the opportunities but also challenges through a thorough examination of market, policy and

technological trends. Furthermore, the report features exclusive interviews with government agencies, leading end users, technology providers and academics, who provide first-hand snapshots of the opportunities and challenges in the Chinese market.

The GUIDE features the following:

- **Industry Survey:** The largest-ever natural refrigerant survey in China collected responses from nearly 1,100 industry representatives, over half of which identified themselves as system manufacturers. With around 58% of the respondents noting they work for a large firm (over 500 employees), the survey is able to cover a high share of the market and gauge the strongest trends.
- **China's Market Today & Tomorrow:** The results of the survey show that CO₂, ammonia and hydrocarbons already have an established share across different sectors. CO₂ is currently seen as the most popular, with 29% of respondents already working with the refrigerant. Half of those that do not currently use natural refrigerants plan to introduce such products or services in the future. A strong shift to CO₂ and hydrocarbons across different applications can be expected by 2020.
- **Market Maps & Info graphics:** Three sector-specific market maps and two info graphics illustrate the dynamic market for natural refrigerants in five specific sectors. Data collected from leading manufacturers of natural refrigerant-based systems indicate that there are at least 34 CO₂-based industrial refrigeration installations and 8 CO₂-based supermarkets in China. Heat pumps represent another dynamic sector for natural refrigerants, with over 300 commercial CO₂ heat pumps and the potential for 50,000 CO₂ heat pumps to be installed in the country by 2020. A growing trend towards natural refrigerants can also be seen in the light commercial refrigeration sectors, where there are already more than 750,000 HFC-free units in the Chinese market, using both CO₂ and hydrocarbons. The use of hydrocarbons has made a significant progress also in the room air conditioning (RAC) sector in recent years. With three R290 RAC production lines completed today (out of 20 planned), annual production capacity accounts for 400,000 units.

Available for free - Chinese edition coming soon

The 'GUIDE to Natural Refrigerants in China – State of the Industry 2015' was written in close collaboration with CAR who will be supporting shecco to make this publication available for the Chinese market. A Chinese language version will be ready to download for free at publications.shecco.com soon.

Download the GUIDE China here:

http://publication.shecco.com/upload/file/org/1432134296704407_297598.pdf

shecco's other upcoming GUIDEs

The 'GUIDE to Natural Refrigerants in China – State of the Industry 2015' marks the beginning of a new look for shecco's GUIDE series. A fresher design will be a hallmark of shecco's upcoming GUIDEs including an updated 'GUIDE to Natural Refrigerants in North America', the first 'GUIDE to Natural Refrigerants in Japan' as well as the 'GUIDE to Natural Refrigerant Training'.

About shecco

For more than a decade market accelerator shecco has been active in helping bring climate friendly technologies faster to market. shecco supports over 100+ partners worldwide in the HVAC&R sector, where the focus is on sustainable refrigeration, heating & cooling technologies using natural refrigerants. shecco offers a variety of services in three areas: 1) media, including online industry platforms, magazines and a catalogue of dedicated research reports; 2) market development, including market research, consultancy and public affairs services, as well as special international projects; and 3) events, including international conferences and national workshops.

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