THE PASSAGE:
TECHNOLOGICAL CHANGEOVER,
ISSUES AND OPPORTUNITIES
AGENDA

1. Refrigeration
2. Refrigerants
3. Refrigeration Competences

4. Refrige-Needs
THE GLOBAL INDUSTRIAL REFRIGERATION MARKET HAS BEEN ESTIMATED $18.4 BILLION IN 2018, GROWING AT A CAGR IN BETWEEN 4.5 AND 5.4% FROM 2018 TO 2024 (SOURCE: MARKETSANDMARKETS).

MECHANICAL INDUSTRY IN ITALY WORTH ABOUT 4.7 BILLION EUR (2.7 BN EUR EXPORT), THE SECOND IN EUROPE; JUST REFRIGERATION COMPRESSORS ARE ABOUT 610M EUR, 260M OF WHICH ARE EXPORT
THE GLOBAL COMMERCIAL REFRIGERATION EQUIPMENT MARKET TOTALED $3.6 BILLION IN 2017 AND IS ESTIMATED TO REACH NEARLY $4.9 BILLION BY 2022, GROWING AT A COMPOUND ANNUAL GROWTH RATE (CAGR) OF 6.3% FOR THE PERIOD OF 2017-2022 (SOURCE: BCC RESEARCH).

COMMERCIAL REFRIGERATION WORTH ABOUT $14.0 BILLION (SOURCE: GRAND VIEW RESEARCH)

ANIMA/ASSOCOLD RESEARCH CENTER ACCOUNTED ABOUT $1.0 BILLION FOR ASSOCOLD, WHILE ANIE/EFCEM ACCOUNTED FOR ANOTHER 1.0 BILLION IN PROFESSIONAL REFRIGERATION SEGMENT
WE HAVE ABOUT 88K SME AND BIG COMPANIES THAT ARE PLAYING IN THE HVACR SEGMENT, INSTALLING AND MAINTAINING SYSTEMS, FOR A TOTAL SALES VALUE HVACR SPECIFIC OF ABOUT 1.65BN EUR

Among those above, there are about 4k SMEs of Refrigeration technicians (Assofrigoristi estimate), whose sales are about 900M EUR

Split system sales is about 1M unit/year, that is there are at least another 750M EUR sales in installation/maintenance
WHAT’S HAPPENING…

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SUPERSMART

Consiglio Nazionale delle Ricerche

M immuneenseeione

MINISTERO DELL'ISTRUZIONE, DELL'UNIVERSITÀ E DELLA RICERCA

INAIL

ACCREDIA
REFRIGERANT
ILLEGAL TRADE
AMAZON STOP SALES W/O CERTIFICATE
AFTER 5 YEARS FROM REG. (UE) 517/14...

...A NEW DECREE!

FINALLY IN ITALY WE HAVE THE DECREE THAT IS GOING TO MAKE OUR COUNTRY COMPLIANT WITH F-GAS REGULATION, ABROGATING REG. 842/06!

THIS’ TAKING MORE CONTROL FOR FGAS CERTIFICATION, HFC REFRIGERANT COMMERCE, HFC MONITORING, ...
A NEW LABOUR CONTRACT FOR HVACR COMPANIES

ASSOFRIGORISTI HAS DEVELOPED 2 CONTRACT SCHEMES FOR SME AND INDUSTRY TO TACKLE THE ITALIAN LIMITATIONS OF A STANDARD MECHANICAL INDUSTRY LABOUR CONTRACT

THE NEW CONTRACTS WILL BE FACING:

H24 labour needs, 6 days/wk labour needs
Seasonal needs
Top amount of working hours
Cost reduction for non productive hours (driving)
EN13313 for technicians
Etc.

THEY WILL BE PRESENTED AT REFRIGERĂ
REFRIGERANTS: HFCS AND HFOS PRICING ISSUES

HFCS ALTERNATIVES HAVE REACHED THE SAME PRICE LEVEL OF HFCS (R448A/R449A ABOUT THE SAME AS R404A)

THE REFRIGERANT MARKET HAS CHANGED AND WE HAD A FLIP-OVER:

Jan 2017, R404A about 8.0 USD;
Jan 2018, R404A about 80.0 USD
Jan 2019, R448A=R404A about 50.0 USD

ARE REFRIGERANT MANUFACTURERS PUSHING FOR NATREF ONLY?
REFRIGERANT: ILLEGAL TRADE

WORRIES ARE GROWING FOR ILLEGAL IMPORT OF HFCS

IN ITALY ASSOFRIGORISTI AND LEGAMBIENTE ARE WORKING WITH NOE POLICE FOR FACING IT
REFRIGERANT: MANAGE THE STATUS QUO

MOST OF EXISTING INSTALLED SYSTEMS ARE STILL WITH HFCS

ASSOFRIGORISTI IS PUSHING FOR RECOVERY AND RECYCLING

WE MADE THREE GUIDES FOR THE BEST REFRIGERANT MANAGEMENT
In order to cope with phase out and to face retrofitting issues (availability, lack of competence, etc), we are informing the market for:

refrigerant management at the end-of-life if GWP>2500

Refrigerant management when waste decision is taken

*Pushing for action on a Consortium formation as per French example ADC3R*
REFRIGERATION COMPETENCES
COMPETENCE FOR THE FUTURE
TRAINING: CREATED A NEW GENERATION OF TECHNICIAN

A NEW TRAINING CENTER FOR TRANSCRITICAL CO2 IS OPENING THANKS TO AN AGREEMENT AMONG A PROFESSIONAL SCHOOL, ASSOFRIGORISTI AND ANIMA/ASSOCOLD

THE FIRST TRANSCRITICAL CO2 IN A SCHOOL EVER, FOR THE NEW NATREF REFRIGERATION TECHNICIANS NEEDED FROM THE MARKET

THE SCHOOL TRAINING CENTER WILL BE USED FOR PROFESSIONAL TRAINING, TOO

NEW PROJECT UNDERGOING WITH SCHOOLS AND COMPANIES
REFRIGE-NEEDS
REFRIGE-NEEDS

MORE CONTROL/INVESTMENTS ON:

- Schools and training
- EcoDesign and certified performance control
- F-gas trading and (ab)use control
- Incentives for refrigerant change over as well as on efficiency
- Customer information for qualified installer/designer
- Refrigerant consortium
Thank You!