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Euroshop 2014

Technology and market trends update

EuroShop

Tokyo, 2nd April 2014

Marc Chasserot, Managing Director

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European food retail research

drivers, challenges and technologies of European supermarket operators to reduce energy consumption and carbon footprint

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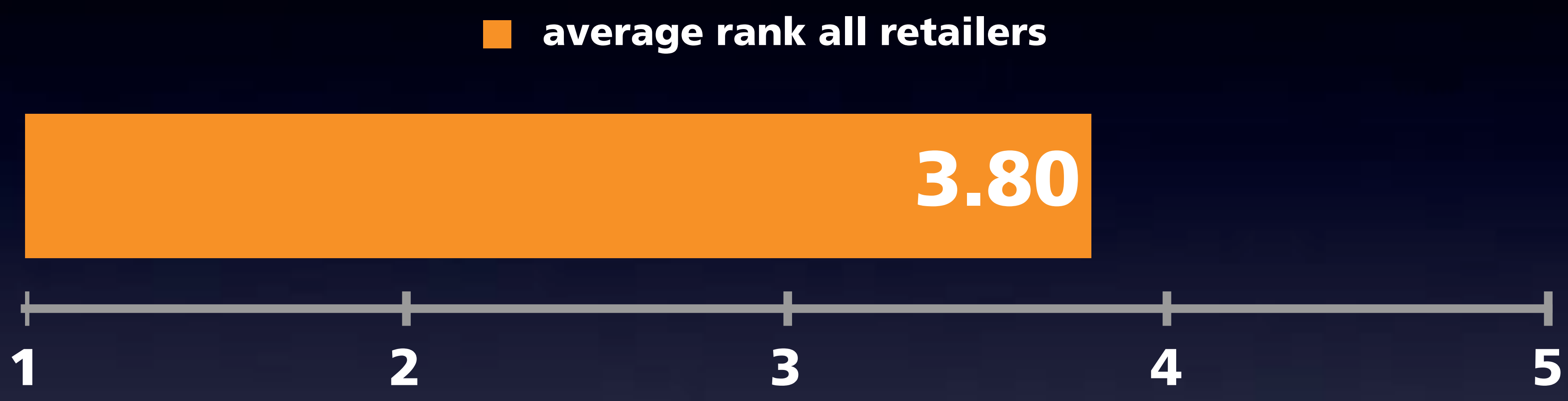
about the research

- qualitative research with quantitative elements
- period: 10 January to 21 February 2014
- interviews with leading food retailers in Germany, France, Denmark, Norway, the UK + other mainly Western and Northern European countries
- 50 initial responses, 33 used in analysis for EuroShop
- retailers that agreed to be mentioned (others opted to remain anonymous):

importance of reduced carbon footprint in stores for overall future business success



- reducing the carbon footprint in their stores is "rather important / important" to Western and Northern European mostly large food retailers
- technology choice is embedded in a broader framework of sustainability considerations
- carbon footprint reduction in stores and future business success are directly linked

importance of reduced carbon footprint in stores for overall future business success

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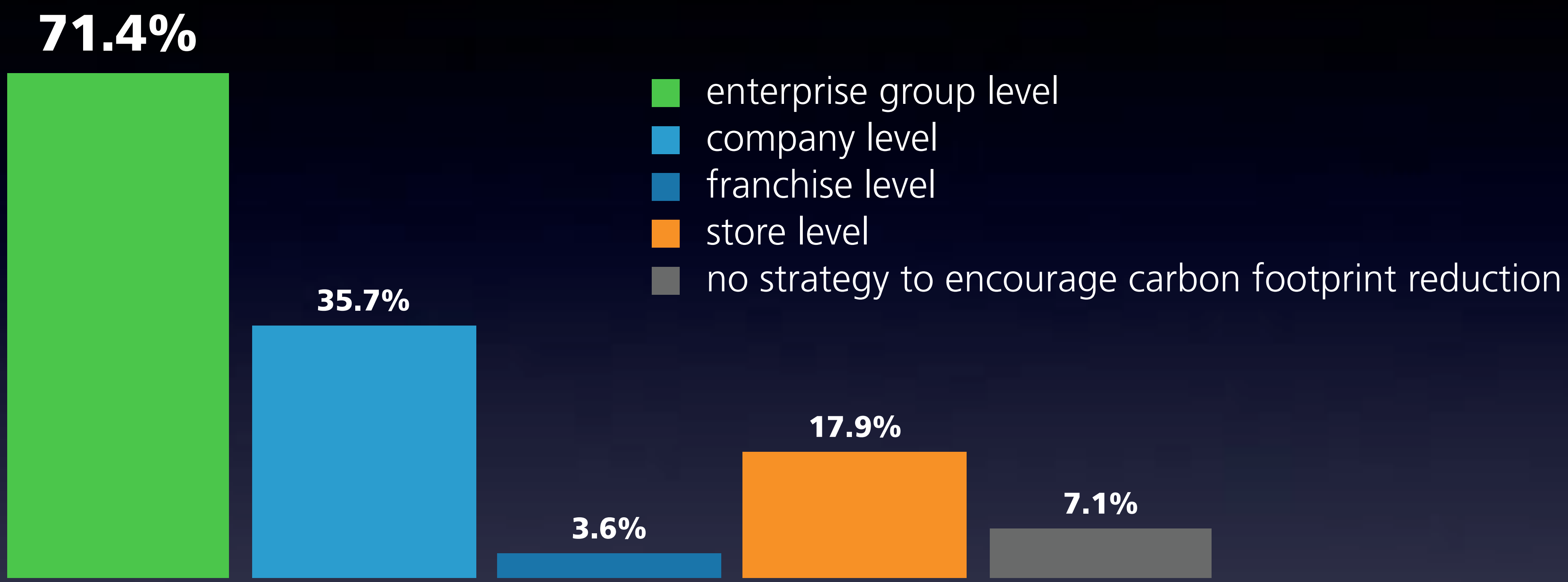
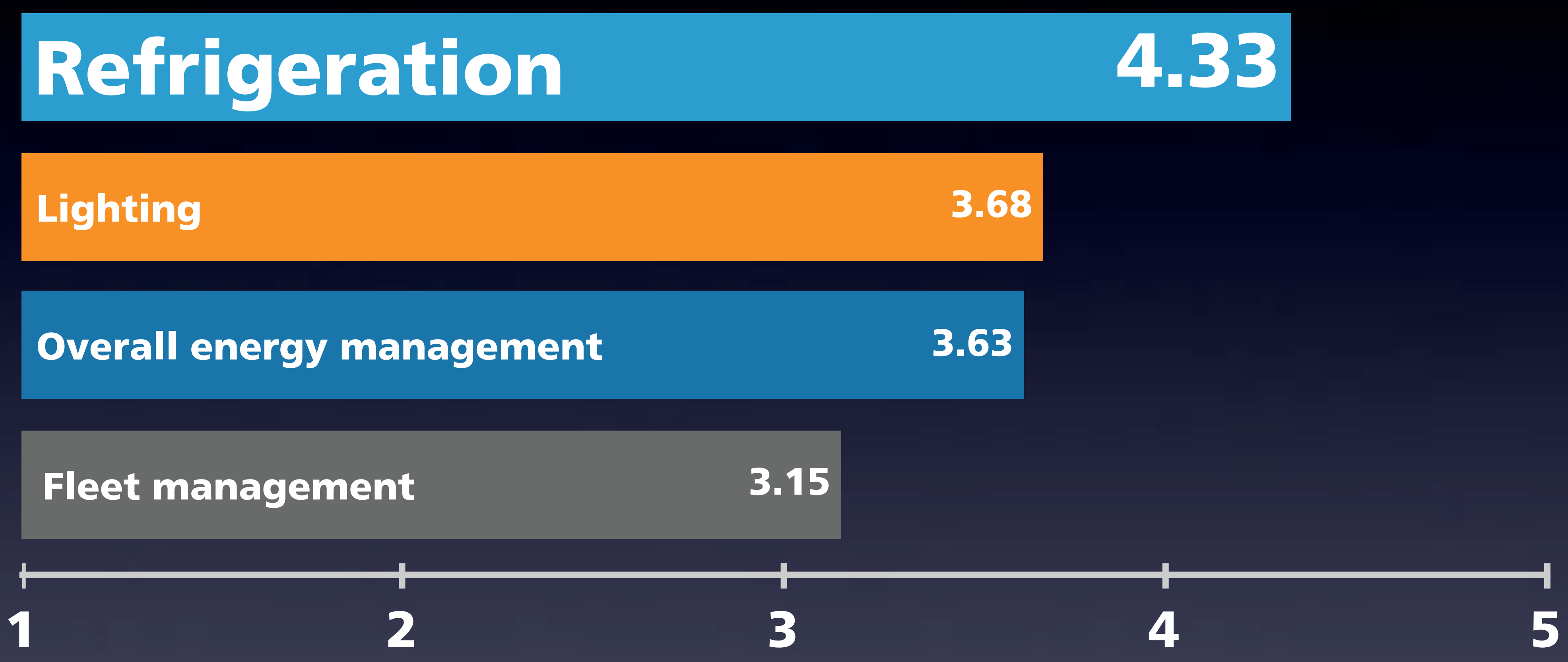
- technology choice is embedded in a broader framework of sustainability considerations
- carbon footprint reduction in stores and future business success are directly linked
- German food retailers attach the greatest value to carbon footprint reduction as a tool to increase or maintain future business success (4.43 average rank)

strategy to encourage carbon footprint reduction in stores



- an overwhelming majority follows a strategy at the enterprise level to encourage carbon footprint reduction across all enterprise group members = carbon footprint reduction is driven from the highest-possible level
- more than 1/3 follows only or also such a strategy at the company level
- only very few state there is no such strategy available at any level

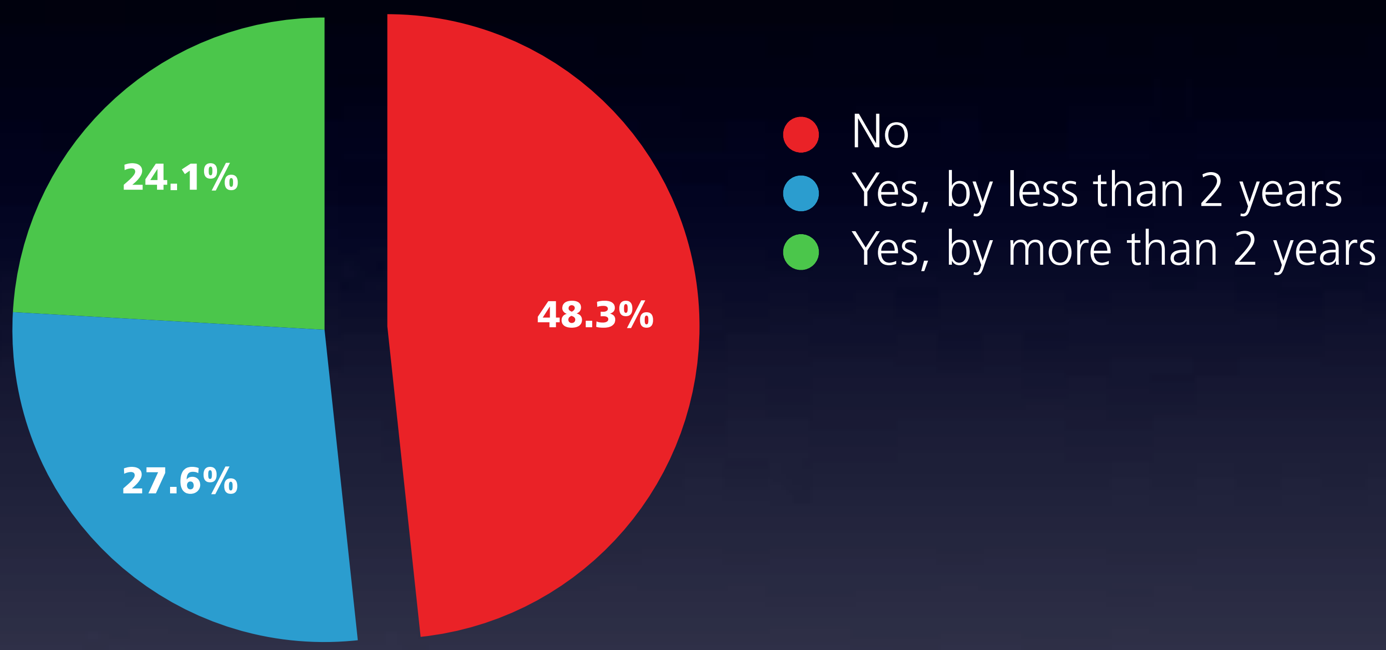
importance of environmental features to increase energy efficiency in stores



- refrigeration - energy-efficient systems & the use of low-global warming refrigerants - has the highest priority among surveyed European food retailers, translating to "rather important / important" in their strategy to increase their stores' energy efficiency

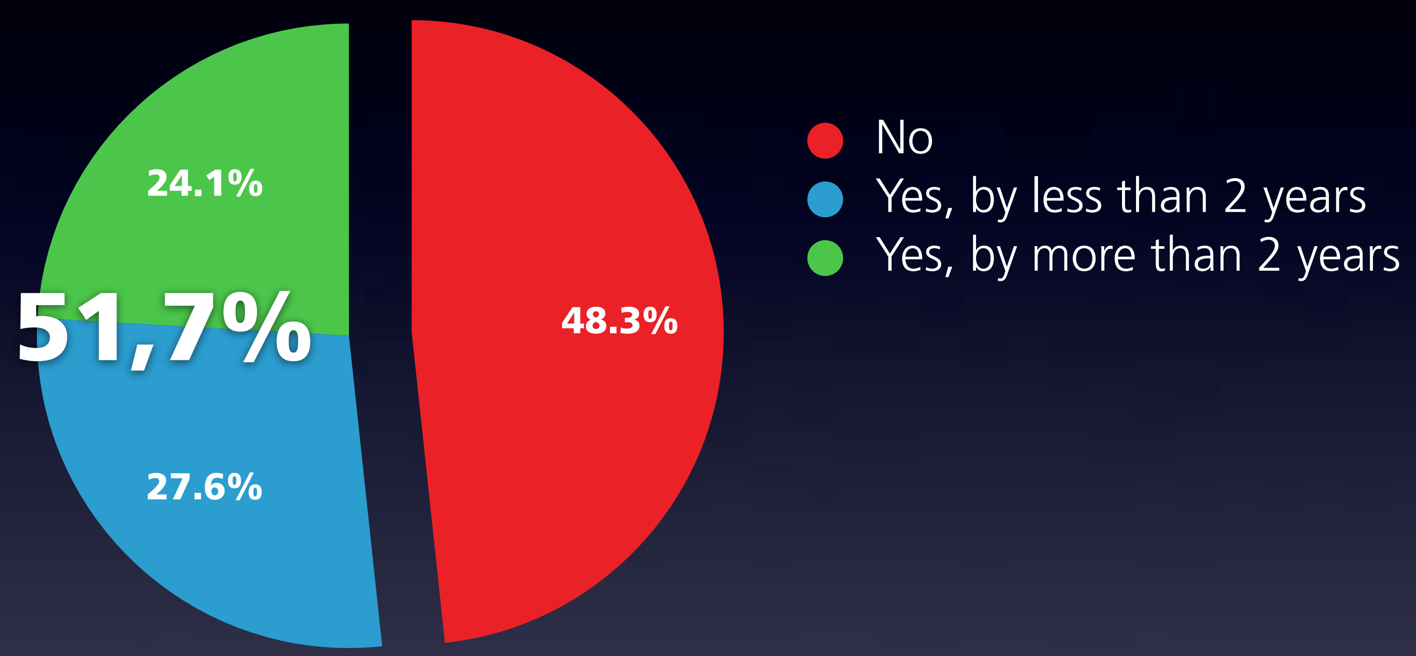
- German food retailers attach a more equal value to the different means of increasing a store's energy efficiency

willingness to reduce investment cycles to promote the uptake of more environmentally-friendly refrigeration



- more than half of all respondents would be willing to reduce their normal investment cycles to promote the uptake of more environmentally-friendly refrigeration technology
- among those, 24.1% would even be willing to reduce investment cycles by more than 2 years
- the average investment cycle for refrigeration systems in surveyed food retailers is mostly between 9-15 years

willingness to reduce investment cycles to promote the uptake of more environmentally-friendly refrigeration



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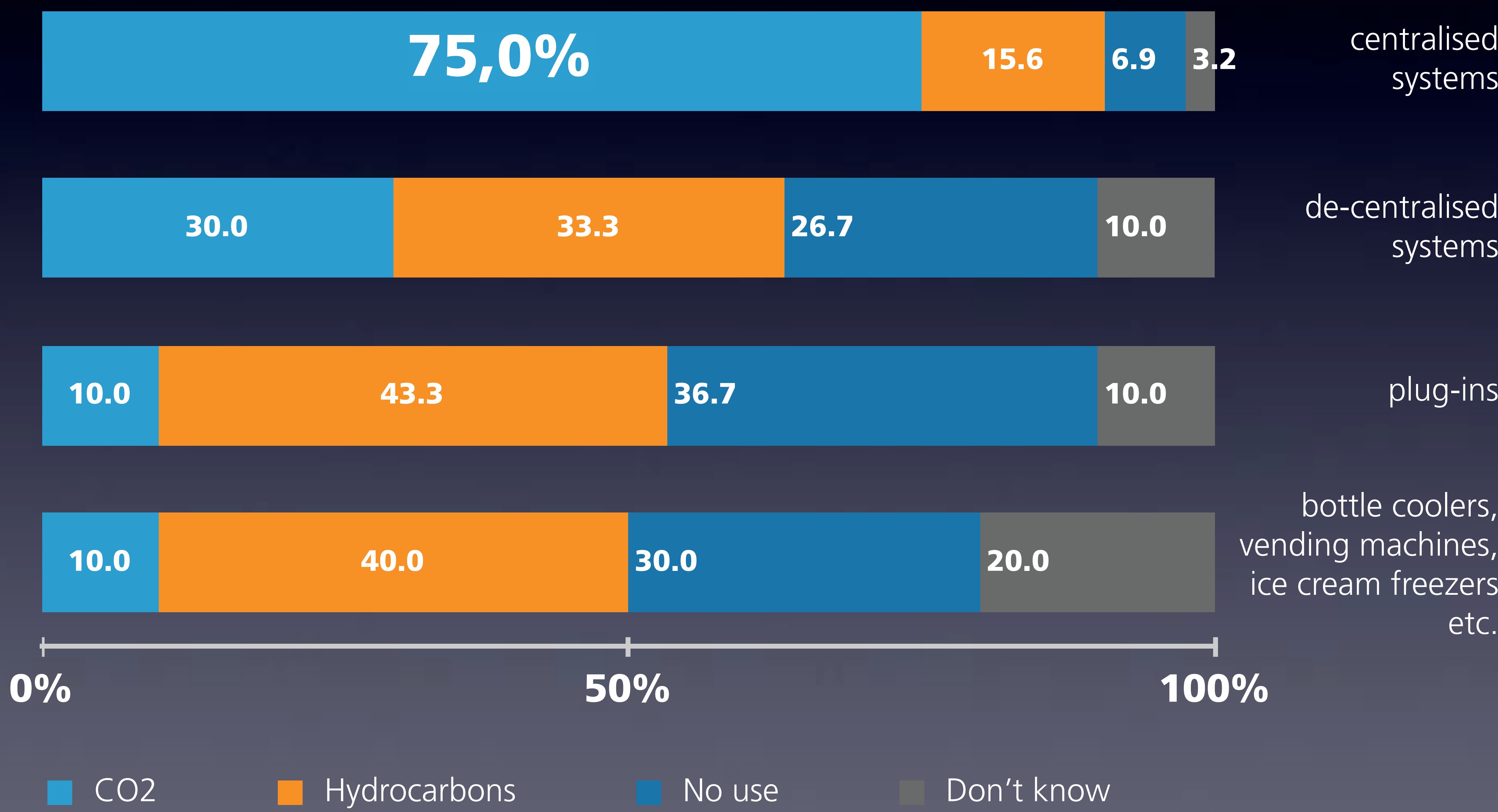
use of natural refrigerants among European food retailers, by application



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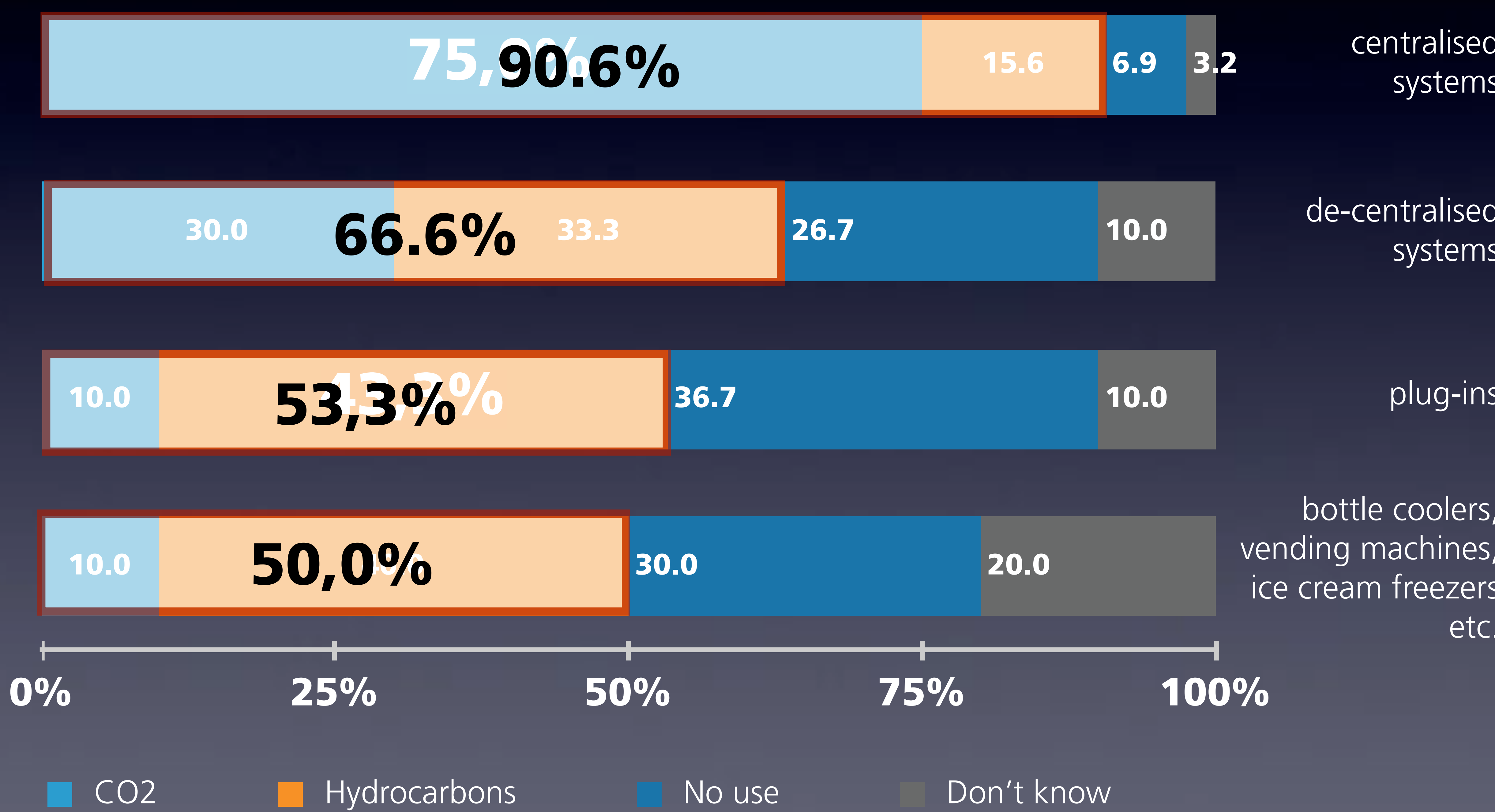
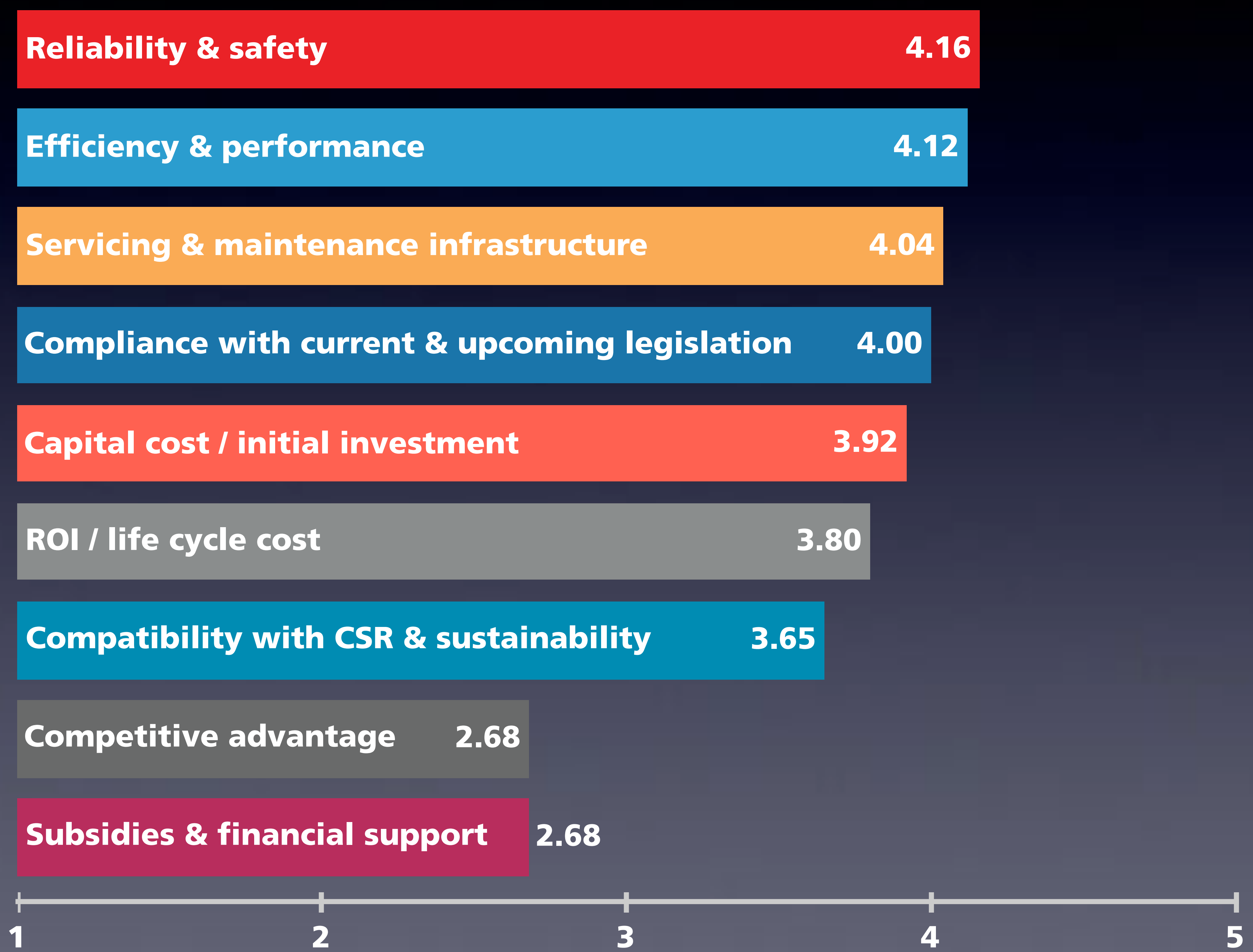


importance of factors for purchasing new refrigeration technology for stores



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performance of natural refrigerant technology as compared to F-gas solutions

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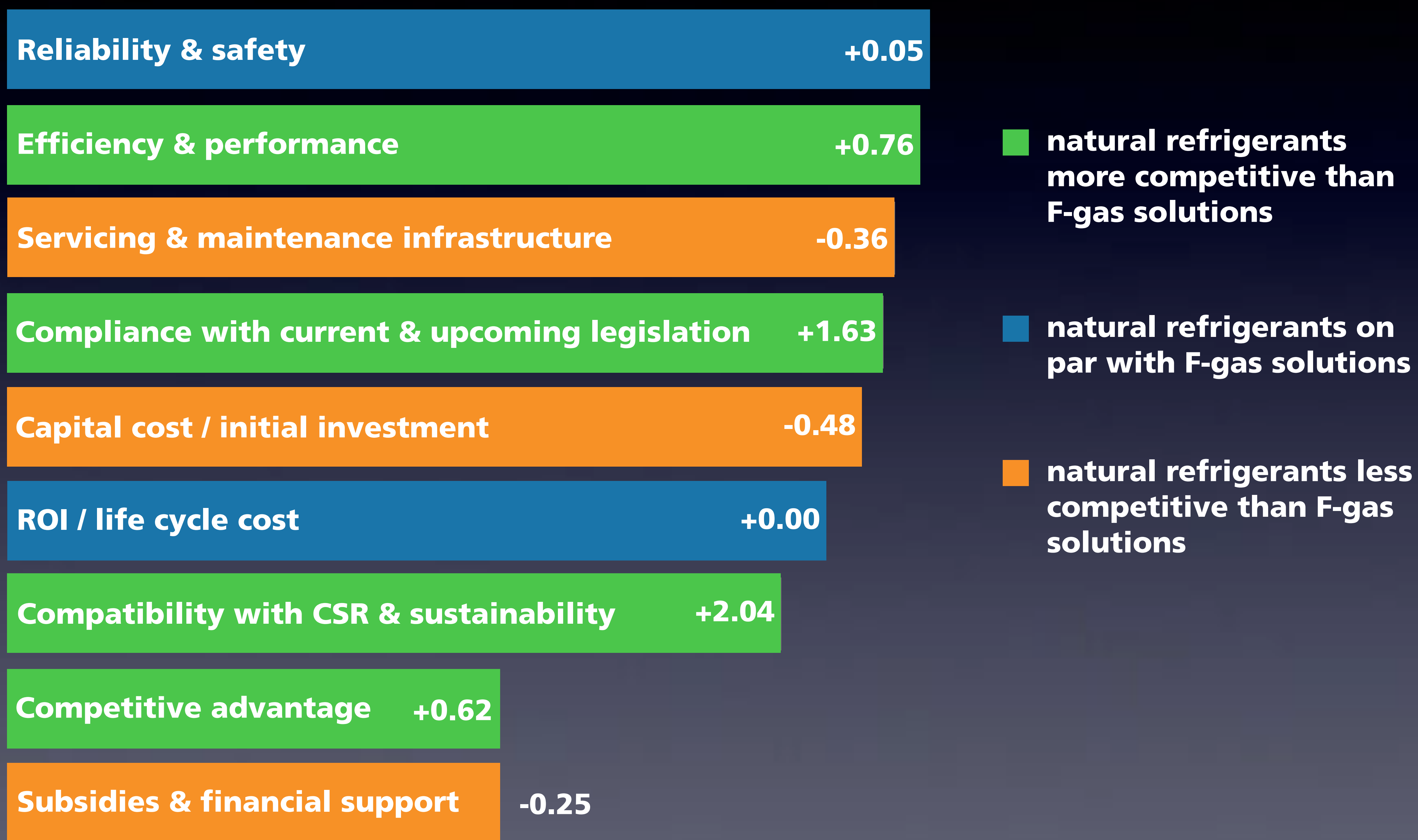

impact of F-gas bans in centralised refrigeration systems as of 2022

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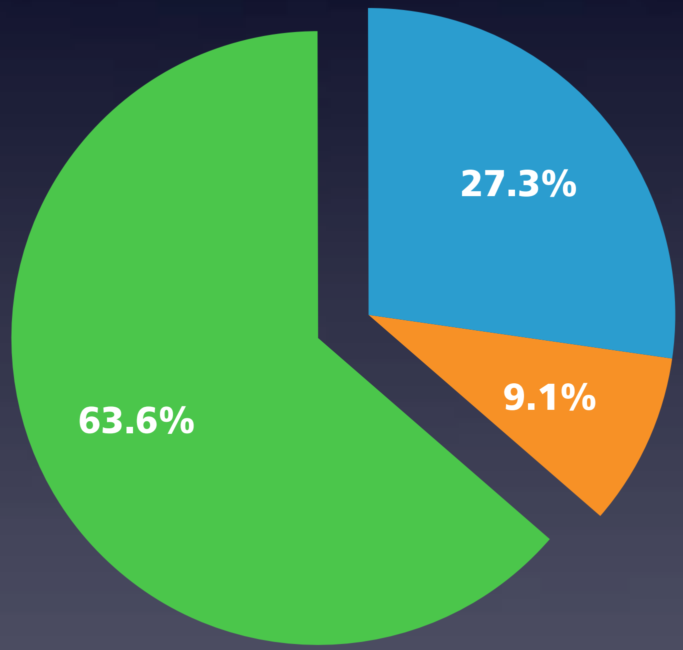
- more than 3 out of 5 food retailers anticipated upcoming bans on the use of HFCs to adapt their refrigeration strategy and use non-fluorinated (natural refrigerant) gases
- those are now well-positioned to combine long term legislative compliance with investment security, independent of upcoming F-gas rules



- without exception, all food retailers have already heard about the upcoming HFC bans and have developed an appropriate strategy
- only a minor share has adopted a wait-and-see strategy to adapt their refrigeration strategy closer to the 2022 deadline

- I need to adapt my refrigeration strategy already today/or as soon as the f-gas agreement becomes official.
- I need to adapt my refrigeration strategy, but closer to the 2022 date.
- The f-gas agreement does not change my strategy as I am already implementing f-gas alternatives in new systems.
- I have not heard about the f-gas rules and/or I have no clear strategy yet regarding the use of f-gases in my store.

"In 10+ years of following natural refrigerants I have never seen so many commercial products for R744 and hydrocarbons, from so many companies" (marc chasserot)

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Epta

CAREL

Carrier
United Technologies

GREEN & COOL
Green Refrigeration Systems

FRIGO
CONSULTING AG

SCM FRIGO
refrigerating systems

Danfoss

Bitzer
THE HEART OF FRESHNESS

GEA

GÜNTNER

EMERSON

OFFICINE MARIO DORIN SINCE 1918
DORIN
INNOVATION

KIMESSA AG
Gas monitoring systems

frost-trol

arneg

eliwell FRANCE

MAJA

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AHT

Carrier
United Technologies

JBG 2

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MAFIROL GROUP

FRICON
DOMESTIC, COMERCIAL AND INDUSTRIAL REFRIGERATION

Gastro-Cool

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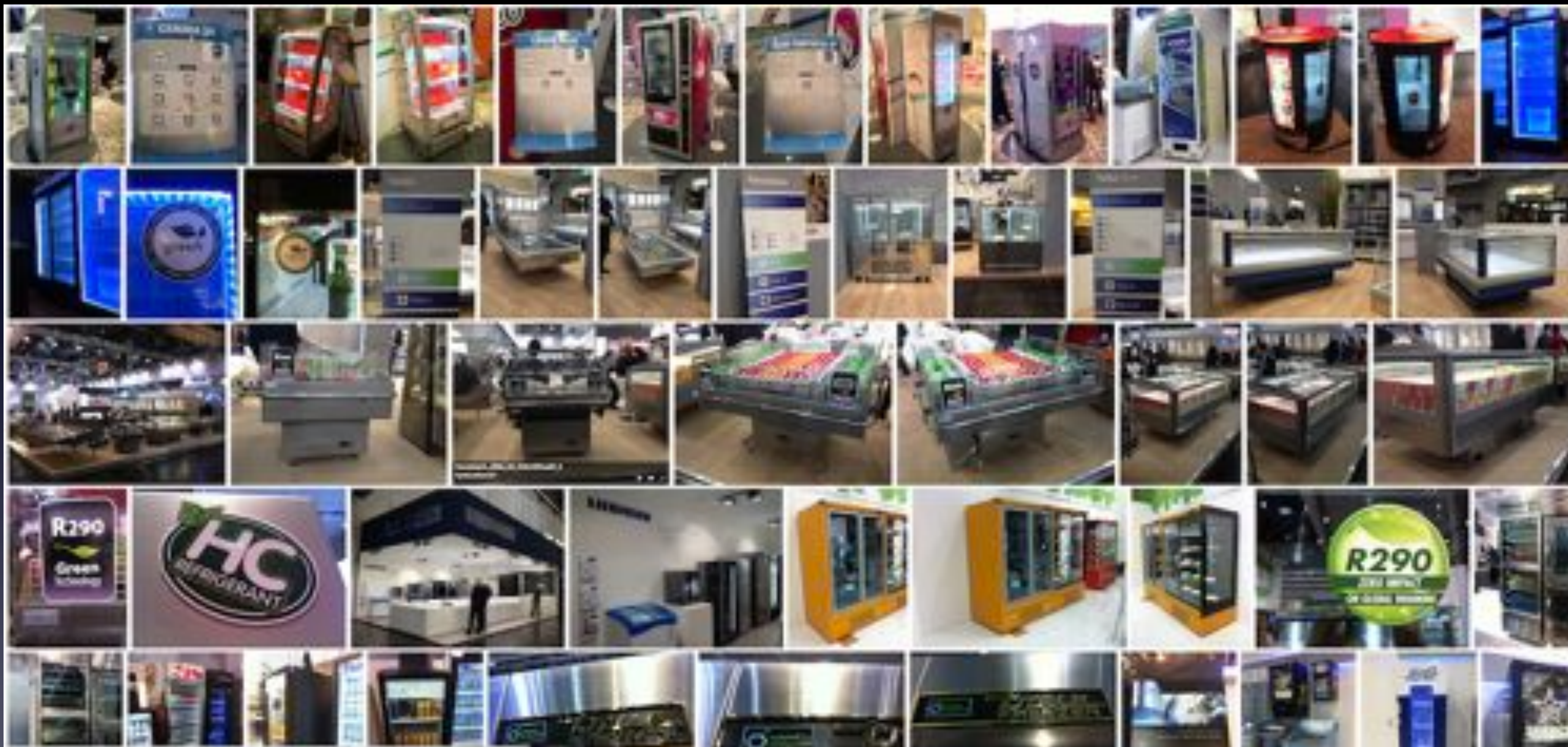

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どうも有り難うございました！