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Market Trends and Opportunities

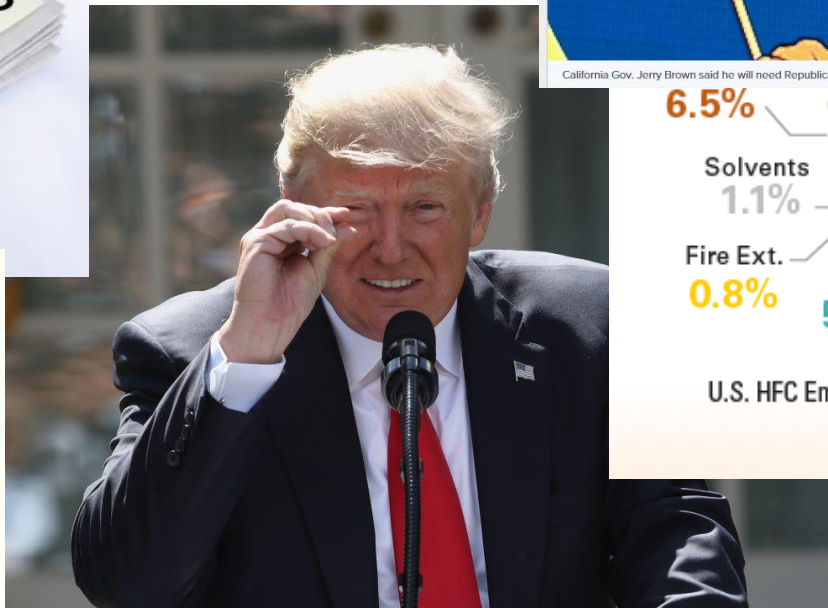
Scott Martin

Director of Business Development and
Industry Relations

HVACR industry unfazed by Paris exit

Cooling Post

The U.S. manufacturers' group AHRI insists that the U.S. withdrawal from the Accord will not change the HVACR industry's commitment to energy efficient environmental stewardship. "The fact that the United States government has chosen alternative avenues other than the Paris Accord to address its energy and environmental objectives does not in any way alter the resolve of America's HVACR and weather industry to reduce the environmental impact of the products and equipment we sell," said Stephen Yurek, AHRI president and CEO. [READ MORE](#)



California, New York, Washington unite to back climate pact

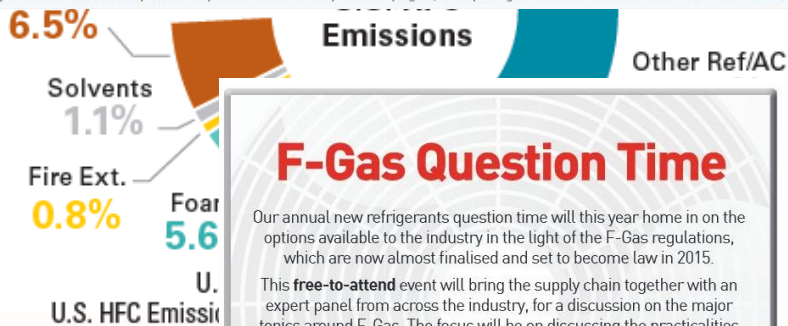
By KATHLEEN RONAYNE, ASSOCIATED PRESS · SACRAMENTO, Calif. — Jun 1, 2017, 9:06 PM ET

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California Gov. Jerry Brown said he will need Republican's help to renew California's cap-and-trade program, while speaking at the California Chamber of Commerce 92nd... more +



F-Gas Question Time

Our annual new refrigerants question time will this year home in on the options available to the industry in the light of the F-Gas regulations, which are now almost finalised and set to become law in 2015.

This **free-to-attend** event will bring the supply chain together with an expert panel from across the industry, for a discussion on the major topics around F-Gas. The focus will be on discussing the practicalities of the new regulations and the considerations when working with new refrigerants, the standards and the training that may be necessary.

Panellists include:

Policy specialist Ray Gluckman, **Enviros**, Mike Nankivell, **ACRIB**; Barry Lyons, **F-Gas Consultant**; Graham Wright, **Daikin**.

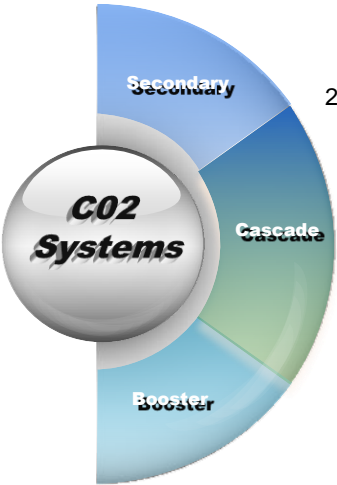
Hillphoenix

GREEN COMPANY



Acceptance and Growth of CO₂ Booster Technology

Evolution of CO₂ Technology Applications



CO₂ Secondary (pumped) Systems

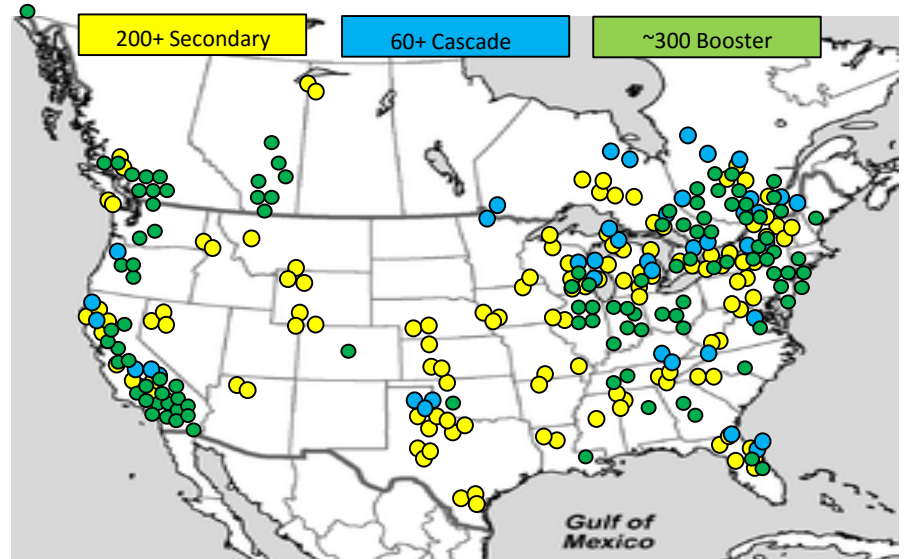
2006 - Low (2007) and Medium (2010) Temperature
Over 200 Installation in North America

CO₂ Cascade (subcritical) Systems

Low temperature (2008)
Over 60 Installation in North America

CO₂ Booster (transcritical) Systems

Low & Medium temperature (2012)
Over 3000 Installations Worldwide
Close to 300 in N. America



 **Approximately 400 Booster Installations in North America ~ 300 Hillphoenix**

Understanding the ROI and Impact on Total Cost of Ownership

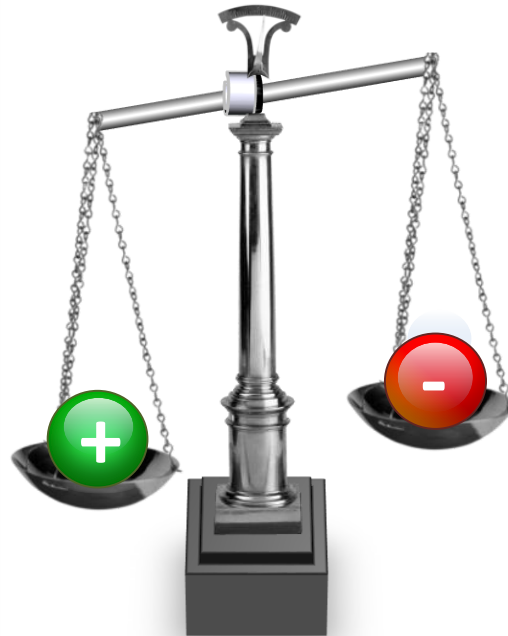
Measureable Savings

Save on ...

- ✓ Start-up refrigerant charge
- ✓ Refrigeration installation
- ✓ Electrical installation
- ✓ Case performance with EEV's
- ✓ Energy

Intangible Benefits

- ✓ Future HFC retrofit cost avoidance
- ✓ Relief from leak & recordkeeping requirements
- ✓ Savings PM program w/ lower cost refrigerant
- ✓ Better quality product w/ better case controls
- ✓ Impact on social responsibility

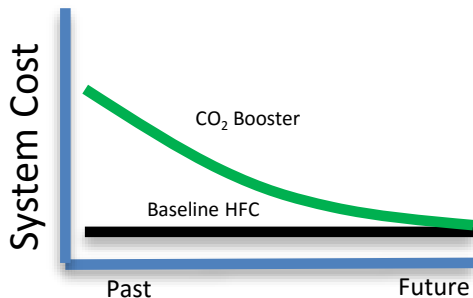


Challenges

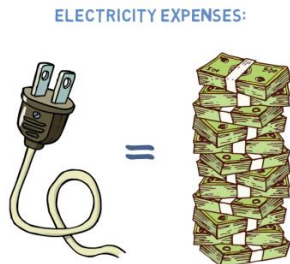
- ✓ Capital cost of the equipment
- ✓ Technician availability/capability
- ✓ Energy evaluation

Robust Processes and Capabilities

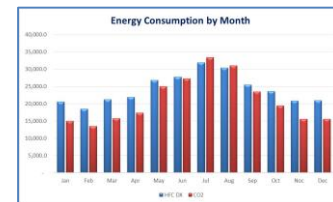
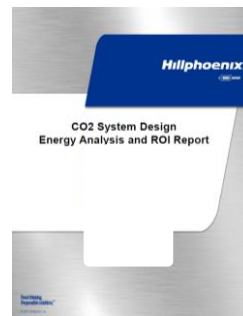
Drive Toward Cost Parity



Aggressively Target Incentives and Rebates



Improved ROI



Comprehensive Training (Customer and Technician)



White Papers



Training Manuals



Online Training

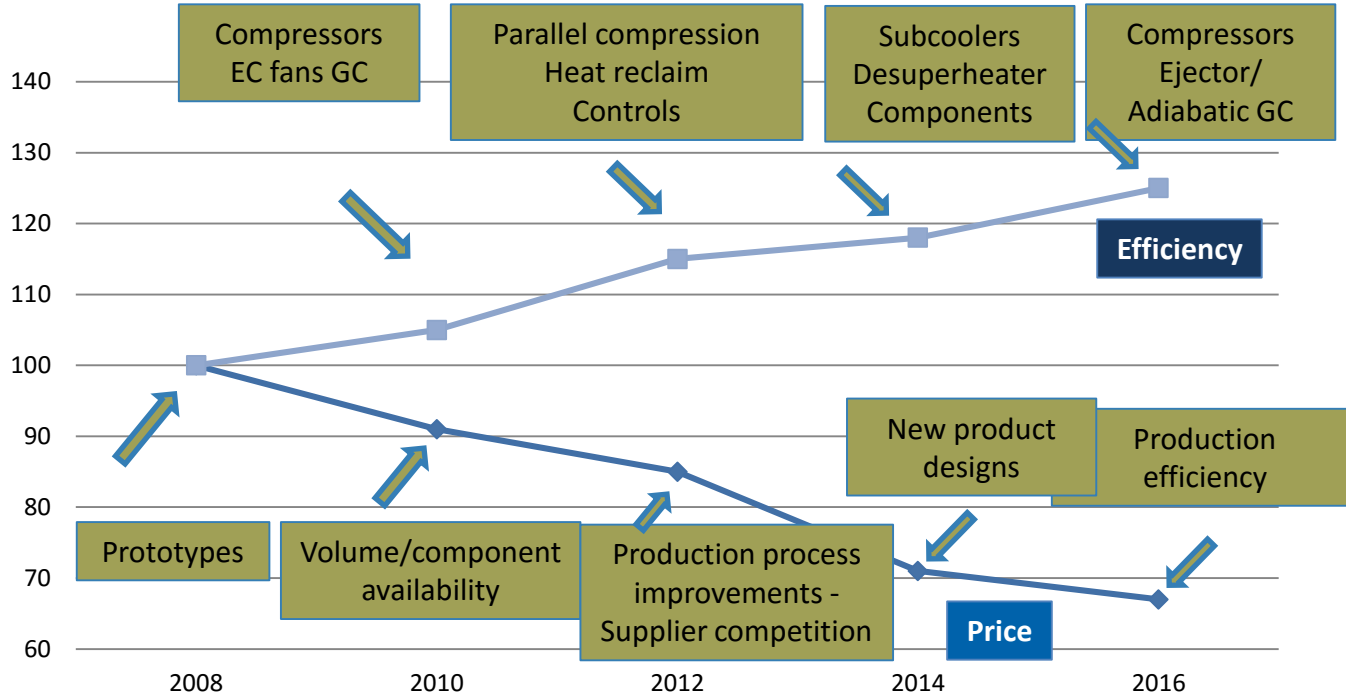


In-Person Training

Extensive Field Service Engineer and Dealer Network



Increasing System Efficiency and Driving Down Price



Energy Efficiency Deployment Update

Deployed 2013 ✓ High pressure sub coolers

- Using 45°F Facility Chilled Water - *Patents pending*
- Peak Savings 20-30%; Annual Savings 6-15+%

Deployed 2014 ✓ Adiabatic gas coolers

- Peak savings 20-30+%, Annual savings 10%

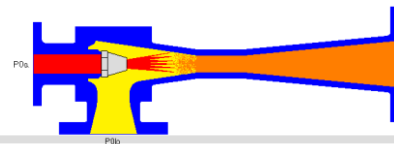
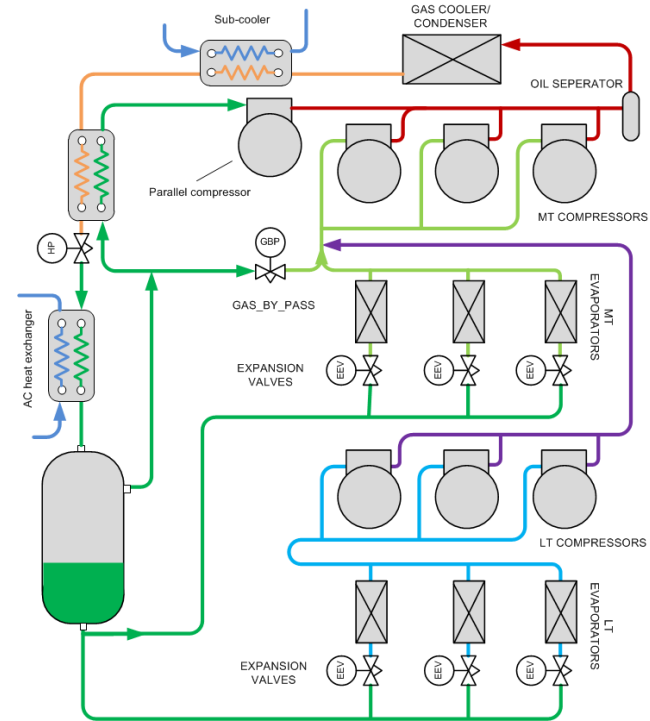
Deployed 2016 ✓ Parallel Compression systems

- Peak savings 12-17%, Annual savings 6-8%



Deployed 2017 ✓ Ejector with Parallel Compression

- Peak savings 15-20%, Annual savings 8-10%



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Leading CO₂ technology for refrigeration.

- 100% environmentally friendly • non-toxic, inflammable
- no ozone depletion • no global warming impact
- low noise • single refrigerant • low cost of installation
- low cost of maintenance • compact design
- easy installation • easy service
- low energy consumption
- future-proof solution

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Responsible solutions.**

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Thank you very much!

