



Business Case for  
Natural Refrigerants

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# TECHNOLOGY LEADERSHIP ROUND TABLE

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## Creating market demand – across the industry

In many markets natural refrigerant growth is driven by a combination of

1. Regulation
  1. F-Gas
  2. SNAP / CARB regulations
2. Monetary devices ( Taxation / Subsidies )
  1. ETS / Carbon price tools, as used in NZ ( has lead to a > 20% reduction in R404A use)

These are driving the move to natural refrigerants much faster, how do we, when relying on a 18 year phase-out manage to convince a contractor/end user.

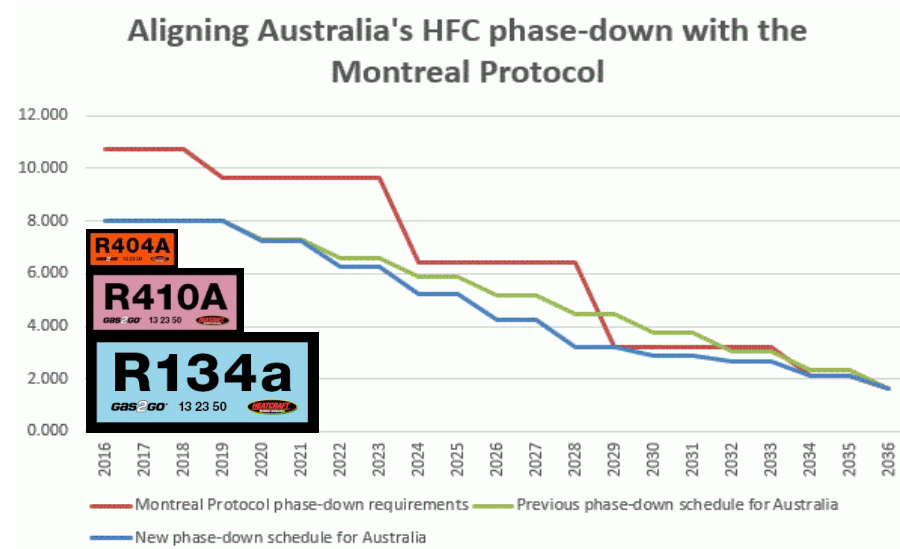
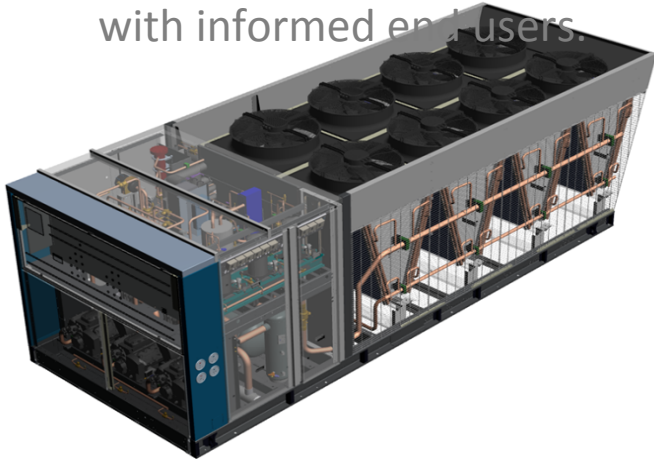


Figure 3: Aligning Australia's HFC phase-down with the Montreal Protocol

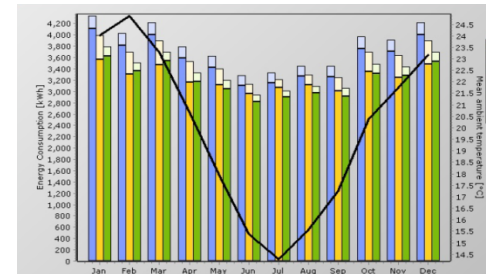
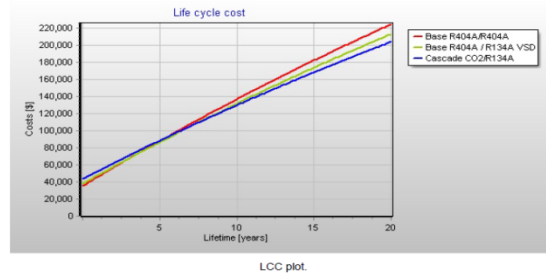
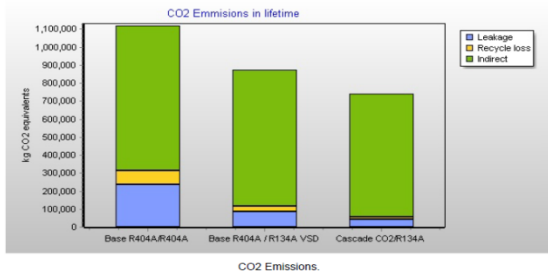
## Opportunities, Growth and Demand.

- Increasing use of natural refrigerants in the heavy commercial/light industrial.
- Ongoing efforts from suppliers to improve the warm weather efficiency
- Demand for “Ready to Run” solutions
- Integrated Solutions, Refrigeration and HVAC from the same Rack(s)
- Contractors wanting to be able to have Total Cost of Ownership discussions with informed end users.



## Moving beyond lowest capital cost

- Refrigerant choice is becoming a primary discussion with customers
- Contractors are needing to have a much more complex conversation.
- Understanding the end user needs for a future proof solution that is reliable, cost effective with lowest possible ongoing costs
- Suppliers partnering and supporting contractors to talk with end users.
- Provide compelling success stories to make end users comfortable with saying yes.



## Conveying the message to people outside this room

Almost everyone here is a believer in the potential for Natural refrigerants and the opportunities that they create for the industry.

We represent a small percentage of the total industry

Expanding the audience via education, knowledge sharing, and technology is an ongoing and important trend moving forward.

- Conferences like today's
- Supplier lead training opportunities
- Knowledge sharing programs
- Potential cross training within industry.
- TAFE Programs for Natural refrigeration technologies