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*Market Opportunities*

# The McDonald's You Don't Know



# Why Natural Refrigerants?



De-listing likely to continue



Minimizes number of transitions



Makes long term business sense



Right thing to do for environment

# Transition Plan & Accomplishments



## Launched Fall of 2010

Phase	Equipment	Availability	Where
1	Small Refrigeration (150 grams or less R290)	Yes	Scaling in Europe Released in US
2	Medium Refrigeration (walk-ins, shake machine)	Pilot testing	N/A
3	Large Refrigeration (HVAC)	?	N/A

## Accomplishments

- 14 pieces of R290 equipment available
- Up to 30% more energy efficient
- Deployed > 9,000 pieces of equipment, primarily in Europe
- R290 equipment released in US

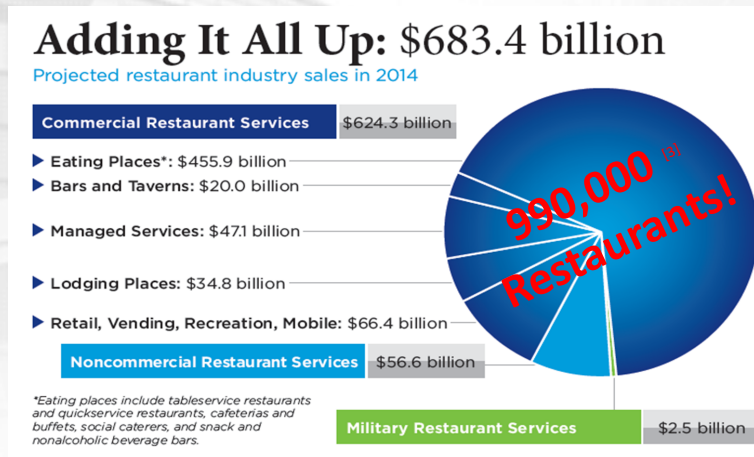


## McDonald's – 35,000 restaurants (globally)

700,000<sup>[1]</sup>

- OJ dispenser
- Cream dispenser
- Refrigerated rails
- Reach-in refrigerators (multiple)
- Reach-in freezers (multiple)
- Sundae/shake machine
- Frozen fry dispenser
- Walk-in cooler
- Walk-in freezer
- HVAC (multiple)

## US Restaurant Industry



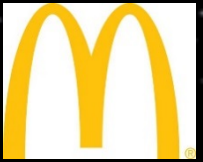
[1] Estimated number of pieces of refrigerated equipment in the System  
 [2] System means company owned and franchised restaurants  
 [3] Based on 2014 National Restaurant Association's Restaurant Industry Report



Natural refrigerant solutions need to meet to the following criteria to be **practical** for McDonald's:

1. Change needs to be supported by local regulations
2. Service infrastructure needs to be in place
3. Improved energy efficiency
4. Upfront and maintenance cost parity





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25 & 26 June - Atlanta, Georgia