

**Commercial Refrigeration Market by Product Type, Refrigerant Type (HCFCs, HFCs, HFO, Isobutane, Propane, Ammonia, Carbon Dioxide), Application, End Use (Supermarkets & Hypermarkets, Hotels & Restaurants), Door Type, and Region - Global Forecast to 2030**

Market Report | 2025-12-05 | 307 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global commercial refrigeration market is projected to grow from USD 51.26 billion in 2025 to USD 67.31 billion by 2030, at a CAGR of 5.6% during the forecast period. The global commercial refrigeration market is growing steadily, driven by expanding food retail, stronger cold-chain needs, and rising demand from supermarkets, convenience stores, food service, and other sectors. Growth is further supported by stricter food-safety regulations, the shift to energy-efficient and eco-friendly systems, and increasing adoption of smart, digitally monitored refrigeration technologies.

<https://mnmimg.marketsandmarkets.com/Images/commercial-refrigeration-market-img-overview.webp>

"By product type, refrigerated display case segment to account for second-largest share during forecast period"

The refrigerated display case segment is anticipated to hold the second-largest share in terms of value in the commercial refrigeration market during the forecast period, as supermarkets, hypermarkets, and convenience stores expand globally and prioritize attractive, energy-efficient product presentation. Rising urbanization and shifting consumer preferences toward fresh and ready-to-eat foods are driving retailers to upgrade to modern, visually appealing display cases that enhance merchandising. Additionally, advancements such as LED lighting, improved insulation, and low-GWP refrigerants are prompting replacement demand as businesses seek to reduce energy costs and meet sustainability regulations, further accelerating the segment's growth.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

"By refrigerant type, hydrocarbons segment to account for second-largest market share during forecast period"

The hydrocarbons segment is anticipated to hold the second-largest share of the commercial refrigeration market during the forecast period. The market for this segment is expanding rapidly as retailers and foodservice operators move toward systems with lower environmental impact and improved energy efficiency. Hydrocarbon refrigerants like propane and isobutane have become increasingly favored as they offer strong cooling performance while meeting global regulations aimed at reducing high-GWP gases. Their use is also rising in modern display cases, reach-in coolers, and small commercial units as manufacturers optimize system designs for better safety and efficiency. This shift toward sustainable, regulation-compliant refrigeration solutions is making hydrocarbons the second-largest segment in the market.

"Food & beverage distribution segment to be second-largest application during forecast period"

The food & beverage distribution segment is estimated to account for the second-largest share in the commercial refrigeration market during the forecast period. The market in this segment is driven by the expanding global supply chains and the demand for temperature-controlled transport. Rising consumption of fresh produce, dairy, meat, and ready-to-cook items requires reliable cold-storage and handling across warehouses, logistics hubs, and last-mile delivery networks. Companies are also investing in modern refrigeration systems to reduce product loss, meet stricter safety standards, and support the surge in e-commerce grocery deliveries. Together, these factors are pushing the food & beverage distribution segment.

"By end use, hotels & restaurants segment to account for second-largest market share during forecast period"

The hotels & restaurants segment is anticipated to hold the second-largest share in terms of value in the commercial refrigeration market during the forecast period, driven by rising consumer demand for fresh, high-quality meals. Moreover, the growing preference for dining out is prompting businesses to upgrade their kitchens with more efficient and reliable refrigeration systems. Hotels and restaurants are adopting advanced, space-saving, and energy-efficient units to improve food safety, reduce operating costs, and meet tightening health regulations. These trends are driving steady investment in commercial refrigeration.

"North America to account for second-largest market share during forecast period"

The North America region is estimated to account for the second-largest share in terms of value in the commercial refrigeration market during the forecast period, due to ongoing upgrades in food retail infrastructure, a well-established cold-chain network, and rising demand for fresh and frozen foods. Supermarkets, convenience stores, and foodservice operators are investing heavily in modern, energy-efficient refrigeration systems to meet stringent environmental regulations and reduce operating costs. Additionally, the expansion of e-commerce grocery delivery and increased focus on food safety standards are accelerating the adoption of advanced refrigeration solutions.

Profile break-up of primary participants for the report:

-□By Company Type: Tier 1 - 65%, Tier 2 - 20%, and Tier 3 - 15%

-□By Designation: Directors- 25%, Managers- 30%, and Others - 45%

-□By Region: North America - 30%, Asia Pacific - 40%, Europe - 20%, Middle East & Africa - 7%, and South America - 3%

Daikin (Japan), Johnson Controls (US), Hussmann Corporation (US), Danfoss (Denmark), Dover Corporation (US), Haier Inc. (China), and EPTA Corporate (Italy) are some of the major players operating in the commercial refrigeration market.

Research Coverage:

The report defines segments and projects the commercial refrigeration market based on product type, refrigerant type, door type, application, end use, and region. It provides detailed information regarding the major factors influencing the market's growth, such as drivers, restraints, opportunities, and challenges. It strategically profiles commercial refrigeration manufacturers, comprehensively analyzing their market shares and core competencies.

Reasons to Buy the Report:

The report is expected to help the market leaders/new entrants by providing them with the closest approximations of revenue

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

numbers of the commercial refrigeration market and its segments. This report is also expected to help stakeholders obtain an improved understanding of the market's competitive landscape, gain insights to improve the position of their businesses, and develop suitable go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of critical Drivers (Rapid expansion of cold chain infrastructure driven by e-commerce grocery and pharmaceutical sectors, Growth in retail food and hospitality sectors, and Integration of IoT-enabled, energy-efficient, and smart control systems in commercial refrigeration), Restraints (Stringent regulations against the use of fluorocarbon refrigerants enforced by the United Nations Environment Programme (UNEP) under the Montreal Protocol and Kigali Amendment), Opportunities (High demand for frozen & processed food worldwide and Rising demand for energy-efficient refrigeration systems utilizing natural refrigerants (CO<sub>2</sub>, ammonia, hydrocarbons)), and Challenges (Growing skilled labor shortage in refrigeration industry) influencing the growth of the commercial refrigeration market

- Product Development/Innovation: Detailed insights on upcoming technologies and research & development activities in the commercial refrigeration market.

- Market Development: Comprehensive information about lucrative markets - the report analyses the commercial refrigeration market across varied regions.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Daikin (Japan), Johnson Controls (US), Hussmann Corporation (US), Danfoss (Denmark), Dover Corporation (US), Haier Inc. (China), and EPTA Corporate (Italy) in the commercial refrigeration market

## **Table of Contents:**

1	INTRODUCTION	30
1.1	STUDY OBJECTIVES	30
1.2	MARKET DEFINITION	30
1.3	STUDY SCOPE	31
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	31
1.3.2	INCLUSIONS AND EXCLUSIONS	32
1.3.3	YEARS CONSIDERED	32
1.3.4	CURRENCY CONSIDERED	33
1.4	RESEARCH LIMITATIONS	33
1.5	STAKEHOLDERS	33
1.6	SUMMARY OF CHANGES	34
2	EXECUTIVE SUMMARY	35
2.1	MARKET HIGHLIGHTS AND KEY INSIGHTS	35
2.2	KEY MARKET PARTICIPANTS: MAPPING OF STRATEGIC DEVELOPMENTS	36
2.3	DISRUPTIVE TRENDS IN COMMERCIAL REFRIGERATION MARKET	37
2.4	HIGH GROWTH SEGMENTS	38
2.5	REGIONAL SNAPSHOT: MARKET SIZE, GROWTH RATE, AND FORECAST	39
3	PREMIUM INSIGHTS	40
3.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN COMMERCIAL REFRIGERATION MARKET	40
3.2	COMMERCIAL REFRIGERATION MARKET, BY REGION	40
3.3	COMMERCIAL REFRIGERATION MARKET, BY KEY COUNTRIES	41
4	MARKET OVERVIEW	42

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.1	INTRODUCTION	42
4.2	MARKET DYNAMICS	43
4.2.1	DRIVERS	43
4.2.1.1	Rapid expansion of cold chain infrastructure driven by e-commerce grocery and pharmaceutical sectors	43
4.2.1.2	Integration of IoT-enabled, energy-efficient, and smart control systems in commercial refrigeration	44
4.2.1.3	Growth in retail food and hospitality sectors	44
4.2.2	RESTRAINTS	46
4.2.2.1	Stringent regulations against use of fluorocarbon refrigerants	46
4.2.3	OPPORTUNITIES	46
4.2.3.1	Rising demand for energy-efficient refrigeration systems utilizing natural refrigerants	46
4.2.3.2	High demand for frozen & processed food worldwide	47
?		
4.2.4	CHALLENGES	47
4.2.4.1	Growing skilled labor shortage	47
4.3	UNMET NEEDS AND WHITE SPACES	48
4.3.1	UNMET NEEDS IN COMMERCIAL REFRIGERATION MARKET	48
4.3.2	WHITE SPACE OPPORTUNITIES	48
4.4	INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES	49
4.4.1	INTERCONNECTED MARKETS	49
4.4.2	CROSS-SECTOR OPPORTUNITIES	49
4.5	EMERGING BUSINESS MODELS AND ECOSYSTEM SHIFTS	50
4.5.1	EMERGING BUSINESS MODELS	50
4.5.2	ECOSYSTEM SHIFTS	50
4.6	STRATEGIC MOVES BY TIER-1/2/3 PLAYERS	51
4.6.1	KEY MOVES AND STRATEGIC FOCUS	51
5	INDUSTRY TRENDS	52
5.1	PORTER'S FIVE FORCES ANALYSIS	52
5.1.1	BARGAINING POWER OF SUPPLIERS	53
5.1.2	BARGAINING POWER OF BUYERS	53
5.1.3	THREAT OF NEW ENTRANTS	53
5.1.4	THREAT OF SUBSTITUTES	54
5.1.5	INTENSITY OF COMPETITIVE RIVALRY	54
5.2	MACROECONOMIC OUTLOOK	54
5.2.1	INTRODUCTION	54
5.2.2	GDP TRENDS AND FORECAST	54
5.2.3	TRENDS IN GLOBAL COMMERCIAL REFRIGERATION INDUSTRY	56
5.3	VALUE CHAIN ANALYSIS	57
5.3.1	RESEARCH & DEVELOPMENT	57
5.3.2	RAW MATERIAL	57
5.3.3	MANUFACTURING	57
5.3.4	DISTRIBUTION NETWORK	58
5.3.5	END-USE INDUSTRIES	58
5.4	ECOSYSTEM ANALYSIS	58
5.5	TRADE DATA	59
5.5.1	IMPORT SCENARIO (HS CODE 8418)	59
5.5.2	EXPORT SCENARIO (HS CODE 8418)	60
5.6	KEY CONFERENCES AND EVENTS, 2025-2026	61

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.7	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	62
5.8	INVESTMENT AND FUNDING SCENARIO	62
5.9	CASE STUDY ANALYSIS	63
5.9.1	CARRIER CASE STUDY: KEEPING ICE CREAM REFRIGERATED	63
5.9.2	CARRIER CASE STUDY: KEEPING BANANAS REFRIGERATED	63
5.9.3	VERDE GROUP LIMITED: REFRIGERATION CASE STUDIES	64
5.10	US TARIFF IMPACT ON COMMERCIAL REFRIGERATION MARKET	64
5.10.1	KEY TARIFF RATES	65
5.10.2	PRICE IMPACT ANALYSIS	65
5.10.3	IMPACT ON KEY COUNTRIES/REGIONS	65
5.10.3.1	US	65
5.10.3.2	Europe	66
5.10.3.3	Asia Pacific	66
5.10.4	IMPACT ON END-USE INDUSTRIES OF COMMERCIAL REFRIGERATION	66
5.10.4.1	Hotels & restaurants (HoReCa)	66
5.10.4.2	Supermarkets & hypermarkets	66
5.10.4.3	Convenience stores	66
5.10.4.4	Bakeries	66
6	TECHNOLOGICAL ADVANCEMENTS, AI-DRIVEN IMPACT, PATENTS, INNOVATIONS, AND FUTURE APPLICATIONS	67
6.1	KEY EMERGING TECHNOLOGIES	67
6.1.1	VAPOR COMPRESSION REFRIGERATION USING INORGANIC REFRIGERANTS	67
6.2	COMPLEMENTARY TECHNOLOGIES	67
6.2.1	SMART COMMERCIAL REFRIGERATION TECHNOLOGY (IOT-ENABLED & INTELLIGENT CONTROL SYSTEMS)	67
6.3	TECHNOLOGY/PRODUCT ROADMAP	68
6.3.1	SHORT-TERM (2025-2027)   PROCESS OPTIMIZATION & ENVIRONMENTAL COMPLIANCE	68
6.3.2	MID-TERM (2027-2030)   INNOVATION & SUSTAINABLE TRANSFORMATION	68
6.3.3	LONG-TERM (2030-2035+)   CIRCULARITY, DECARBONIZATION & NEW APPLICATIONS	69
6.4	PATENT ANALYSIS	70
6.4.1	METHODOLOGY	70
6.5	FUTURE APPLICATIONS	73
6.5.1	SMART COLD CHAIN LOGISTICS: DIGITAL REFRIGERATION NETWORKS	73
6.5.2	LOW-GWP REFRIGERANTS & CARBON-NEUTRAL SYSTEMS	74
6.5.3	MODULAR & PORTABLE COOLING UNITS	74
6.5.4	FOOD WASTE REDUCTION TECHNOLOGIES	74
6.5.5	HEALTHCARE & BIOPHARMA COLD STORAGE	75
6.6	IMPACT OF GENERATIVE AI ON COMMERCIAL REFRIGERATION MARKET	75
6.6.1	INTRODUCTION	75
6.6.2	DIAGNOSTICS AND TROUBLESHOOTING	75
6.6.3	ENERGY OPTIMIZATION AND PREDICTIVE MAINTENANCE	76
6.6.4	TRAINING AND INVENTORY MANAGEMENT	76
6.6.5	DESIGN INNOVATION AND SUSTAINABILITY	76
?		
7	SUSTAINABILITY AND REGULATORY LANDSCAPE	77
7.1	REGULATORY LANDSCAPE	77
7.1.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
7.1.2	INDUSTRY STANDARDS	80
7.2	SUSTAINABILITY INITIATIVES	81

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.2.1	CARBON IMPACT AND ECO-APPLICATIONS OF COMMERCIAL REFRIGERATION	81
7.2.1.1	Carbon impact reduction	81
7.2.1.2	Eco-applications	81
7.3	SUSTAINABILITY IMPACT AND REGULATORY POLICY INITIATIVES	82
7.4	CERTIFICATIONS, LABELING, AND ECO-STANDARDS	83
8	CUSTOMER LANDSCAPE & BUYER BEHAVIOR	84
8.1	DECISION-MAKING PROCESS	84
8.2	KEY STAKEHOLDERS AND BUYING CRITERIA	85
8.2.1	KEY STAKEHOLDERS IN BUYING PROCESS	85
8.2.2	BUYING CRITERIA	86
8.3	ADOPTION BARRIERS & INTERNAL CHALLENGES	87
8.4	UNMET NEEDS IN VARIOUS END-USE INDUSTRIES	88
8.5	MARKET PROFITABILITY	89
8.5.1	REVENUE POTENTIAL	89
8.5.2	COST DYNAMICS	89
8.5.3	MARGIN OPPORTUNITIES IN KEY APPLICATIONS	90
9	COMMERCIAL REFRIGERATION MARKET, BY DOOR TYPE	91
9.1	INTRODUCTION	91
9.2	SINGLE	91
9.2.1	OFFERS COMPACT AND EFFICIENT SINGLE DOOR SOLUTIONS FOR SMALL-SCALE COMMERCIAL NEEDS	91
9.3	DUAL	91
9.3.1	DEMAND FOR VERSATILE STORAGE SOLUTIONS TO PROPEL MARKET GROWTH	91
9.4	MULTI	92
9.4.1	ADOPTION IN LARGE-SCALE COMMERCIAL APPLICATIONS TO DRIVE MARKET	92
10	COMMERCIAL REFRIGERATION MARKET, BY REFRIGERANT TYPE	93
10.1	INTRODUCTION	94
10.2	FLUOROCARBONS	96
10.2.1	STRONG COOLING EFFICIENCY AND STABLE THERMODYNAMIC PROPERTIES TO DRIVE ADOPTION	96
10.2.2	HYDROCHLOROFLUOROCARBONS (HCFCs)	97
10.2.3	HYDROFLUOROCARBONS (HFCS)	97
10.2.4	HYDROFLUOROOLEFINS (HFOS)	97
10.3	HYDROCARBONS	97
10.3.1	DEMAND FOR NATURAL AND NON-TOXIC REFRIGERANTS TO DRIVE MARKET	97
10.3.2	ISOBUTANE	98
10.3.3	PROPANE	98
10.3.4	OTHERS	98
10.4	INORGANICS	99
10.4.1	INCREASING ADOPTION OF ENVIRONMENTALLY FRIENDLY SOLUTIONS TO DRIVE MARKET	99
10.4.2	AMMONIA	100
10.4.3	CO <sub>2</sub>	100
10.4.4	OTHERS	100
11	COMMERCIAL REFRIGERATION MARKET, BY PRODUCT TYPE	101
11.1	INTRODUCTION	102
11.2	TRANSPORTATION REFRIGERATION	103
11.2.1	INCREASING DEMAND FOR TEMPERATURE-CONTROLLED FOOD SYSTEMS AND CONTAINERS TO DRIVE MARKET	103
11.2.2	TYPES OF TRANSPORTATION REFRIGERATION	103
11.2.2.1	Shipping container	103

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 11.2.2.2☐Trailer☐103
- 11.2.2.3☐Truck☐103
- 11.3☐REFRIGERATOR & FREEZER☐104
- 11.3.1☐INCREASING EMPHASIS ON FOOD SAFETY AND PRODUCT QUALITY TO DRIVE MARKET☐104
- 11.3.2☐REFRIGERATOR & FREEZER TYPES☐105
- 11.3.2.1☐Walk-in☐105
- 11.3.2.2☐Reach-in☐105
- 11.3.2.3☐Chest☐105
- 11.4☐REFRIGERATED DISPLAY CASE☐106
- 11.4.1☐GROWING NUMBER OF SUPERMARKETS, GROCERY STORES, AND OTHER FOOD RETAIL OUTLETS TO DRIVE MARKET☐106
- 11.5☐BEVERAGE REFRIGERATION☐107
- 11.5.1☐INCREASING DEMAND FOR CHILLED PACKAGED DRINKS TO FUEL ADOPTION☐107
- 11.6☐ICE CREAM MERCHANDISER☐108
- 11.6.1☐INCREASING CONSUMPTION OF ICE CREAM AND FROZEN DESSERTS TO DRIVE DEMAND☐108
- 11.7☐REFRIGERATED VENDING MACHINE☐109
- 11.7.1☐LOW OPERATIONAL & FUNCTIONAL COSTS AND GROWING DEMAND FOR HEALTHY FOODS TO SUPPORT MARKET GROWTH☐109
- ?
- 12☐COMMERCIAL REFRIGERATION MARKET, BY APPLICATION☐110
- 12.1☐INTRODUCTION☐111
- 12.2☐FOOD SERVICE☐112
- 12.2.1☐INCREASING DEMAND FOR SAFE STORAGE TO DRIVE MARKET☐112
- 12.3☐FOOD & BEVERAGE RETAIL☐112
- 12.3.1☐NEED FOR APPEALING PRESENTATION TO FUEL MARKET GROWTH☐112
- 12.4☐FOOD & BEVERAGE DISTRIBUTION☐113
- 12.4.1☐INCREASING DEMAND FOR MODERN COMMERCIAL REFRIGERATION SYSTEMS TO SUPPORT MARKET GROWTH☐113
- 12.5☐FOOD & BEVERAGE PRODUCTION☐113
- 12.5.1☐NEED FOR PRODUCT SAFETY AND QUALITY TO DRIVE DEMAND☐113
- 12.6☐OTHER APPLICATIONS☐113
- 13☐COMMERCIAL REFRIGERATION MARKET, BY END USE☐114
- 13.1☐INTRODUCTION☐115
- 13.2☐HOTELS & RESTAURANTS☐116
- 13.2.1☐GROWING MIDDLE-CLASS POPULATION IN EMERGING COUNTRIES TO DRIVE MARKET☐116
- 13.3☐SUPERMARKETS & HYPERMARKETS☐117
- 13.3.1☐NEED FOR INCREASE EFFICIENCY AND REDUCE COSTS TO DRIVE MARKET☐117
- 13.4☐CONVENIENCE STORES☐118
- 13.4.1☐GROWING TREND OF PACKAGED FOOD CONSUMPTION TO DRIVE DEMAND☐118
- 13.5☐BAKERIES☐119
- 13.5.1☐REQUIREMENT FOR CONTROLLED TEMPERATURE TO PRESERVE INGREDIENTS AND STORE FINISHED PRODUCTS TO DRIVE MARKET☐119
- 14☐COMMERCIAL REFRIGERATION MARKET, BY REGION☐121
- 14.1☐INTRODUCTION☐122
- 14.2☐ASIA PACIFIC☐123
- 14.2.1☐CHINA☐127
- 14.2.1.1☐Expansion of cold chain logistics to support e-commerce grocery deliveries to boost market growth☐127
- 14.2.2☐JAPAN☐129
- 14.2.2.1☐Expansion of retail and hospitality sectors to drive market growth☐129

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 14.2.3 INDIA 131
  - 14.2.3.1 Expansion of quick service restaurant chains and cloud kitchens to boost demand 131
- 14.2.4 SOUTH KOREA 132
  - 14.2.4.1 Growth in frozen food segment to support market growth 132
- 14.2.5 THAILAND 134
  - 14.2.5.1 Growing penetration of hypermarkets and quick service restaurants to fuel market growth 134
- 14.2.6 MALAYSIA 135
  - 14.2.6.1 Rising demand for chilled and frozen food products to support market growth 135
- 14.2.7 SINGAPORE 137
  - 14.2.7.1 Adoption of compact, high-efficiency refrigeration solutions in hospitality and retail sectors to drive demand 137
- 14.2.8 INDONESIA 139
  - 14.2.8.1 Expansion of food service sector and supermarket chains to boost market growth 139
- 14.2.9 REST OF ASIA PACIFIC 140
- 14.3 NORTH AMERICA 142
  - 14.3.1 US 145
    - 14.3.1.1 Construction of cold storage and ice manufacturing facilities to drive market 145
  - 14.3.2 CANADA 147
    - 14.3.2.1 Expanding quick-service restaurant chains and higher consumption of ready-to-eat foods to fuel demand 147
  - 14.3.3 MEXICO 149
    - 14.3.3.1 Increasing urbanization, young consumer base, and ongoing investment in modern retail infrastructure to drive market 149
- 14.4 EUROPE 151
  - 14.4.1 UK 154
    - 14.4.1.1 Growing supermarkets, hypermarkets, and convenience stores to drive market 154
  - 14.4.2 GERMANY 156
    - 14.4.2.1 Regulations to increase adoption of natural refrigerants in commercial refrigeration impacting market growth 156
  - 14.4.3 ITALY 158
    - 14.4.3.1 Increasing adoption of vending machines to drive market 158
  - 14.4.4 FRANCE 159
    - 14.4.4.1 Shift toward natural refrigerants to support market growth 159
  - 14.4.5 SPAIN 161
    - 14.4.5.1 Expansion of food retail, hospitality, and food processing sectors to propel market 161
  - 14.4.6 REST OF EUROPE 163
- 14.5 MIDDLE EAST & AFRICA 164
  - 14.5.1 GCC COUNTRIES 167
    - 14.5.1.1 Saudi Arabia 168
      - 14.5.1.1.1 Expanding cold chain infrastructure to boost adoption 168
    - 14.5.1.2 Rest of GCC Countries 169
      - 14.5.1.2.1 Increasing investments in food retail and logistics infrastructure to support market growth 169
  - 14.5.2 EGYPT 171
    - 14.5.2.1 Expansion of cold chain and improving agricultural cold storage capacity to drive growth 171
  - 14.5.3 TURKEY 173
    - 14.5.3.1 Expanding food manufacturing base, retail modernization, and vibrant hospitality sector to increase adoption 173
  - 14.5.4 REST OF MIDDLE EAST & AFRICA 174
- 14.6 SOUTH AMERICA 176
  - 14.6.1 BRAZIL 179

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.6.1.1	Rising demand for frozen and ready-to-eat foods to fuel adoption	179
14.6.2	ARGENTINA	181
14.6.2.1	Expanding network of supermarkets and restaurant chains to fuel market	181
14.6.3	CHILE	182
14.6.3.1	Investments in logistics and cold storage infrastructure to boost market expansion	182
14.6.4	REST OF SOUTH AMERICA	184
15	COMPETITIVE LANDSCAPE	186
15.1	INTRODUCTION	186
15.2	KEY PLAYERS' STRATEGIES/RIGHT TO WIN	186
15.3	REVENUE ANALYSIS	188
15.4	MARKET SHARE ANALYSIS, 2024	189
15.4.1	DAIKIN INDUSTRIES LTD. (JAPAN)	190
15.4.2	JOHNSON CONTROLS (US)	191
15.4.3	HUSSMANN CORPORATION (US)	191
15.4.4	DANFOSS (DENMARK)	191
15.4.5	DOVER CORPORATION (US)	191
15.4.6	HAIER INC. (CHINA)	192
15.4.7	EPTA CORPORATE (ITALY)	192
15.5	BRAND/PRODUCT COMPARISON	193
15.5.1	MULTIDECKS	194
15.5.2	CORAL	194
15.5.3	DA420IFTECH	194
15.5.4	HR-120A	194
15.5.5	VERTICAL FREEZER DISPLAY	194
15.6	COMPANY VALUATION AND FINANCIAL METRICS	195
15.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	196
15.7.1	STARS	196
15.7.2	EMERGING LEADERS	196
15.7.3	PERVASIVE PLAYERS	197
15.7.4	PARTICIPANTS	197
15.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	198
15.7.5.1	Company footprint	198
15.7.5.2	Region footprint	199
15.7.5.3	Product type footprint	200
15.7.5.4	Door type footprint	201
15.7.5.5	End use footprint	202
15.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	203
15.8.1	PROGRESSIVE COMPANIES	203
15.8.2	RESPONSIVE COMPANIES	203
15.8.3	DYNAMIC COMPANIES	203
15.8.4	STARTING BLOCKS	204
15.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	205
15.8.5.1	Detailed list of key startups/SMES	205
15.8.5.2	Competitive benchmarking of key startups/SMEs	206
15.9	COMPETITIVE SCENARIO	206
15.9.1	PRODUCT LAUNCHES	206
15.9.2	DEALS	207

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 15.9.3 EXPANSIONS 208
- 16 COMPANY PROFILES 210
- 16.1 MAJOR PLAYERS 210
- 16.1.1 DAIKIN INDUSTRIES, LTD. 210
  - 16.1.1.1 Business overview 210
  - 16.1.1.2 Products/Solutions/Services offered 211
  - 16.1.1.3 Recent developments 212
    - 16.1.1.3.1 Product launches 212
    - 16.1.1.3.2 Expansions 212
  - 16.1.1.4 MnM view 212
    - 16.1.1.4.1 Right to win 212
    - 16.1.1.4.2 Strategic choices 213
    - 16.1.1.4.3 Weaknesses and competitive threats 213
- 16.1.2 JOHNSON CONTROLS 214
  - 16.1.2.1 Business overview 214
  - 16.1.2.2 Products/Solutions/Services offered 215
  - 16.1.2.3 Recent developments 216
    - 16.1.2.3.1 Deals 216
    - 16.1.2.3.2 Expansions 216
  - 16.1.2.4 MnM view 217
    - 16.1.2.4.1 Right to win 217
    - 16.1.2.4.2 Strategic choices 217
    - 16.1.2.4.3 Weaknesses and competitive threats 217
- 16.1.3 HUSSMANN CORPORATION 218
  - 16.1.3.1 Business overview 218
  - 16.1.3.2 Products/Solutions/Services offered 218
  - 16.1.3.3 MnM view 219
    - 16.1.3.3.1 Right to win 219
    - 16.1.3.3.2 Strategic choices 219
    - 16.1.3.3.3 Weaknesses and competitive threats 219
- 16.1.4 DANFOSS 220
  - 16.1.4.1 Business overview 220
  - 16.1.4.2 Products/Solutions/Services offered 221
  - 16.1.4.3 Recent developments 222
    - 16.1.4.3.1 Deals 222
  - 16.1.4.4 MnM view 222
    - 16.1.4.4.1 Right to win 222
    - 16.1.4.4.2 Strategic choices 222
    - 16.1.4.4.3 Weaknesses and competitive threats 223
- 16.1.5 DOVER CORPORATION 224
  - 16.1.5.1 Business overview 224
  - 16.1.5.2 Products/Solutions/Services offered 225
  - 16.1.5.3 Recent developments 226
    - 16.1.5.3.1 Product launches 226
    - 16.1.5.3.2 Expansions 227
  - 16.1.5.4 MnM view 227
    - 16.1.5.4.1 Right to win 227

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 16.1.5.4.2 Strategic choices 227
- 16.1.5.4.3 Weaknesses and competitive threats 227
- 16.1.6 HAIER INC. 228
- 16.1.6.1 Business overview 228
- 16.1.6.2 Products/Solutions/Services offered 229
- 16.1.6.3 Recent developments 231
- 16.1.6.3.1 Deals 231
- 16.1.6.4 MnM view 231
- 16.1.6.4.1 Right to win 231
- 16.1.6.4.2 Strategic choices 231
- 16.1.6.4.3 Weaknesses and competitive threats 232
- 16.1.7 EPTA CORPORATE 233
- 16.1.7.1 Business overview 233
- 16.1.7.2 Products/Solutions/Services offered 234
- 16.1.7.3 Recent developments 236
- 16.1.7.3.1 Deals 236
- 16.1.7.4 MnM view 236
- 16.1.7.4.1 Right to win 236
- 16.1.7.4.2 Strategic choices 236
- 16.1.7.4.3 Weaknesses and competitive threats 237
- ?
- 16.1.8 BALTIMORE AIRCOIL COMPANY 238
- 16.1.8.1 Business overview 238
- 16.1.8.2 Products offered 238
- 16.1.8.3 Recent developments 239
- 16.1.8.3.1 Product launches 239
- 16.1.8.3.2 Deals 239
- 16.1.9 TRUE MANUFACTURING CO., INC. 241
- 16.1.9.1 Business overview 241
- 16.1.9.2 Products/Solutions/Services offered 241
- 16.1.10 BLUE STAR LIMITED 243
- 16.1.10.1 Business overview 243
- 16.1.10.2 Products offered 244
- 16.1.10.3 Recent developments 245
- 16.1.10.3.1 Product launches 245
- 16.1.10.3.2 Expansions 245
- 16.1.11 IMBERA 246
- 16.1.11.1 Business overview 246
- 16.1.11.2 Products/Solutions/Services offered 246
- 16.1.12 DE RIGO REFRIGERATION 247
- 16.1.12.1 Business overview 247
- 16.1.12.2 Products/Solutions/Services offered 247
- 16.1.12.3 Recent developments 248
- 16.1.12.3.1 Product launches 248
- 16.1.12.3.2 Deals 249
- 16.1.13 FOGEL GROUP 250
- 16.1.13.1 Business overview 250

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

16.1.13.2 Products/Solutions/Services offered 250  
16.1.14 KUHLMOBELWERK LIMBURG GMBH 252  
16.1.14.1 Business overview 252  
16.1.14.2 Products/Solutions/Services offered 252  
16.1.15 SCM FRIGO S.P.A. 254  
16.1.15.1 Business overview 254  
16.1.15.2 Products/Solutions/Services offered 254  
16.1.16 MAYEKAWA MFG. CO., LTD. 255  
16.1.16.1 Business overview 255  
16.1.16.2 Products/Solutions/Services offered 255  
16.1.17 VIESSMANN KUHLSYSTEME GMBH 257  
16.1.17.1 Business overview 257  
16.1.17.2 Products/Solutions/Services offered 257  
16.1.17.3 Recent developments 258  
16.1.17.3.1 Deals 258  
?  
16.1.18 VOLTAS 260  
16.1.18.1 Business overview 260  
16.1.18.2 Products/Solutions/Services offered 261  
16.1.18.3 Recent developments 262  
16.1.18.3.1 Product launches 262  
16.1.18.3.2 Deals 262  
16.1.19 ARNEG S.P.A. 263  
16.1.19.1 Business overview 263  
16.1.19.2 Products/Solutions/Services offered 263  
16.1.19.3 Recent developments 264  
16.1.19.3.1 Deals 264  
16.1.20 BG-2 265  
16.1.20.1 Business overview 265  
16.1.20.2 Products/Solutions/Services offered 265  
16.1.21 ISA SPA 266  
16.1.21.1 Business overview 266  
16.1.21.2 Products/Solutions/Services offered 266  
16.1.22 METALFRIO 268  
16.1.22.1 Business overview 268  
16.1.22.2 Products/Solutions/Services offered 269  
16.1.23 HOSHIZAKI CORPORATION 271  
16.1.23.1 Business overview 271  
16.1.23.2 Products/Solutions/Services offered 272  
16.1.23.3 Recent developments 273  
16.1.23.3.1 Deals 273  
16.1.24 LIEBHERR 274  
16.1.24.1 Business overview 274  
16.1.24.2 Products/Solutions/Services offered 275  
16.1.25 AUCMA INTERNATIONAL 277  
16.1.25.1 Business overview 277  
16.1.25.2 Products/Solutions/Services offered 278

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

16.1.26	ZHEJIANG XINGXING REFRIGERATION CO., LTD.	279
16.1.26.1	Business overview	279
16.1.26.2	Products/Solutions/Services offered	279
16.1.27	SANDEN INTERCOOL (THAILAND) PCL	281
16.1.27.1	Business overview	281
16.1.27.2	Products/Solutions/Services offered	282
16.1.28	BITZER KUHLMASCHINENBAU GMBH	283
16.1.28.1	Business overview	283
16.1.28.2	Products/Solutions/Services offered	283
16.1.28.3	Recent developments	284
16.1.28.3.1	Deals	284
16.2	OTHER PLAYERS	285
16.2.1	SECOP GMBH	285
16.2.2	ELANPRO	286
16.2.3	NORLAKE, INC.	286
16.2.4	FRIGO BLOCK	287
16.2.5	ZERO ZONE, INC.	288
17	RESEARCH METHODOLOGY	289
17.1	RESEARCH DATA	289
17.1.1	SECONDARY DATA	290
17.1.1.1	List of key secondary sources	290
17.1.1.2	Key data from secondary sources	290
17.1.2	PRIMARY DATA	291
17.1.2.1	Key data from primary sources	291
17.1.2.2	List of primary interview participants (supply side)	291
17.1.2.3	Key industry insights	292
17.1.2.4	Breakdown of interviews with experts	292
17.1.3	DEMAND-SIDE ANALYSIS	293
17.2	MARKET SIZE ESTIMATION	293
17.2.1	BOTTOM-UP APPROACH	294
17.2.2	TOP-DOWN APPROACH	294
17.2.3	SUPPLY-SIDE ANALYSIS	295
17.2.3.1	Calculations for supply-side analysis	296
17.3	GROWTH FORECAST	296
17.4	DATA TRIANGULATION	297
17.5	FACTOR ANALYSIS	298
17.6	RESEARCH ASSUMPTIONS	298
17.7	RESEARCH LIMITATIONS	299
17.8	RISK ASSESSMENT	299
18	APPENDIX	300
18.1	DISCUSSION GUIDE	300
18.2	KNOWLEDGESTORE: MARKETSandMARKETS? SUBSCRIPTION PORTAL	303
18.3	CUSTOMIZATION OPTIONS	305
18.4	RELATED REPORTS	305
18.5	AUTHOR DETAILS	306

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Commercial Refrigeration Market by Product Type, Refrigerant Type (HCFCs, HFCs, HFO, Isobutane, Propane, Ammonia, Carbon Dioxide), Application, End Use (Supermarkets & Hypermarkets, Hotels & Restaurants), Door Type, and Region - Global Forecast to 2030**

Market Report | 2025-12-05 | 307 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code\*

Country\*

Date

2026-03-02

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)