NEW

US industry forecasts for 2012 & 2017

Commercial Refrigeration Equipment

Study # 2365 **July 2008** **$4500**

Demand to rise more than 4% annually through 2012

Demand for commercial refrigeration equipment in the US is forecast to grow more than four percent per year through 2012, exceeding $9 billion. Gains will result from the growing number of foodservice operators and food retailers. However, these firms face narrow margins due to high food prices and intense competition for the consumer dollar, thereby limiting replacement opportunities at existing locations.

Foodservice is expected to be the most rapidly growing market through 2012. About 48 percent of all consumer food expenditures in 2007 occurred outside the home at foodservice outlets such as restaurants, bars and cafeterias. Growth in the number of foodservice operators will continue to increase, benefitting commercial refrigeration equipment demand. The food and beverage retail market will post gains, due to the rising number of food retailers in the US. In addition, consumers' growing appetite for a widening range of refrigerated foods will increase the amount of equipment per store.

US Commercial Refrigeration Equipment Demand by Market
($8 billion, 2007)

Cryogenic equipment, display cases to exhibit best growth

Commercial refrigeration products expected to experience the best growth are cryogenic equipment and display cases. Cryogenic equipment will benefit from the rising level of expenditures on health care in the US, as well as from increasing medical and scientific research. Display cases will benefit from the need of retailers to maintain new, aesthetically pleasing displays to encourage impulse purchasing. In addition, the number of display cases per store is expected to rise.

Transportation refrigeration equipment is the largest product segment, due to the high unit cost of this equipment and to the rising level of refrigerated food shipped in the US. Gains in this segment will be adversely affected by high fuel prices, which will continue to affect profit margins for fleet operators.

Industry structure

Manufacturers of commercial refrigeration equipment for the US market range from small privately held concerns to multinational corporations with billions of dollars in annual sales. Many commercial refrigeration equipment manufacturers are also involved in the broader heating, air conditioning or residential refrigeration industries.

Study coverage

Commercial Refrigeration Equipment, a new Freedonia industry study, is now available for $4500. It offers historical demand data for 1997, 2002 and 2007, as well as forecasts for 2012 and 2017 by product and market. In addition, this study also assesses market environment factors, evaluates company market share and profiles 38 US industry participants such as Enodis, Ingersoll-Rand, Manitowoc and United Technologies.

NEW *US Industry Study with Forecasts for 2012 & 2017*

Commercial Refrigeration Equipment

Table of Contents

List of Tables

List of Charts

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

PRODUCTS

Display Cases

Display ca[...] annually through 2012, reaching $[...]ted by the sluggish capital inves[...]me retailers from upgrading their e[...] from a growing number of refrig[...]umer demand for a widening range c[...]

SAMPLE PAGE
Explanations that support each table's data and forecasts

Display ca[...]eel that an attractive display case helps sell product. Unlike shipping equipment, which can be used until obsolete, display cases need to be attractive to keep customers coming to a store. Growth will also result from the development of more efficient and attractive models, which retailers will seek as a means of improving sales and profit margins. Steady growth in the number of food stores will also provide opportunities, as will the rising number of eating and drinking establishments.

Shipments of display cases are expected to remain flat through 2012, at [...]ited by competition from overseas produc-[...]and Western Europe, tripled from 2002 to [...]xporter to a net importer, a trend that is [...]

COMPANY PROFILES
Profiles for 38 competitors such as Enodis, Ingersoll-Rand, Manitowoc and United Technologies

[...]wo basic types: low temperature and nor-[...]e display cases have historically comprised [...] over 70 percent of display case shipments [...]d to trend toward low temperature cases due to the growing popularity of frozen foods. Normal temperature cases will benefit from the continued popularity of home meal replacements (HMRs), since these [...]ducts are usually held at normal temperatures. Both open and closed low [...]perature cases are expected to post gains. Small stores tend to prefer closed [...]s because they generally occupy less floor space and save energy when used [...]mall numbers. Larger stores tend to prefer open display cases, which are

MARKETS

The foodservice industry, like the food retail industry, utilizes a wide [...]ducts. Beverage refrigeration equipment [...]nt to dispense soda, beer, milk or other [...]use with beverages, as well as to provide [...]isplay cases are used by many establish-[...] cakes and pies, and vending machines are [...]s sales. Reach-in and walk-in freezers and [...]preparation. Reach-in and walk-in units [...]ugh reach-ins are usually preferred in situations where multiple refrigeration levels are needed.

SAMPLE TEXT
Data illustrated with the aid of 50 tables and charts

TABLE III-6

FOODSERVICE MARKET DEMAND FOR COMMERCIAL REFRIGERATION EQUIPMENT BY SECTOR & TYPE (million dollars)

Item	1997	2002	2007	2012	2017
Eating & Drink Establishments (000)					[illegible]
$ refrig equip/ establishment					[illegible]
Foodservice Refrig Equip Demand					[illegible]
By Sector:					
Restaurants & Bars					[illegible]
Other					[illegible]
By Type:					
Reach-Ins					[illegible]
Beverage Refrigeration					[illegible]
Ice Machines					[illegible]
Other					[illegible]
% food service					[illegible]
Comm Refrig Equip Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE
Historical data for 1997, 2002 and 2007 as well as Freedonia forecasts for 2012 and 2017

Source: The Freedonia Group, Inc.

Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end-users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

Order Information

To order fill out the coupon below and mail to The Freedonia Group, or place your order by phone **toll free (800) 927-5900** (US) or **(440) 684-9600**, or by fax **(440) 646-0484**, or by e-mail at **info@freedoniagroup.com**

Free Handling and Shipping

There is **NO** charge for handling and UPS shipping in the US. Expect delivery in 3 to 5 days. Outside the US, Freedonia provides free airmail service. If you require express delivery, Freedonia provides this to you at cost.

Save Fifteen Percent

If you order three (3) different titles at the same time, you can receive a discount of 15%. **If your order is accompanied by a check, you may take a 5% cash discount** (discounts do not apply to corporate use licenses).

Credit Card Orders

You may charge your order to either **American Express**, **MasterCard** or **Visa**. Please include your credit card account number, expiration date and your signature.

Orders Outside of the US

Checks must be paid in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfer instructions please contact our customer service department at info@freedoniagroup.com. Or you may use a credit card.

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2,300 you receive unlimited use of an electronic version (PDF) of the study. Place it on your Intranet, e-mail it to coworkers around the world, or print it as many times as you like! Order it today.

Online Access

The complete text and tables from our studies and reports can be purchased at our website **www.freedoniagroup.com** and through major commercial online hosts.

Other Titles from The Freedonia Group

World Pumps

The global pump market is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by pump product (e.g., centrifugal, positive displacement); market (e.g., process manufacturers, utilities); world region (e.g., Asia/Pacific, North America, Western Europe); and major country. The study also considers market environment and regulatory factors, details industry composition, evaluates company market share and identifies and profiles major industry players worldwide.

#2349 .... 05/2008 .... $5800

Filters in China

Demand for filters in China will jump 14.4% annually through 2011. Air filters will post the fastest gains, spurred by rising output of products that include filters or are made in clean-air factories. The motor vehicle market will remain dominant while the water and waste treatment segment of the utilities and consumer markets grows the fastest. This study analyzes the ¥20.9 billion Chinese filter industry, with forecasts for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.

#2310 .... 05/2008 .... $5100

HVAC Equipment

US HVAC equipment demand will rise 3.2% annually through 2011, driven mainly by robust growth in nonresidential construction and ongoing strength in residential replacement. Heat pumps are now the largest heating type and will continue to leads gains. Unitary air conditioners will remain the leading type of cooling equipment. This study analyzes the $14.3 billion US HVAC equipment industry, with forecasts for 2011 and 2016 by fuel, type and market. It also details market share and profiles major players.

#2259 .... 11/2007 .... $4500

Industrial Valves

US industrial valve demand will top $16 billion in 2011, driven by the construction and public utilities markets. Imports will approach 60% of demand. Key export markets include Canada, Mexico, Western Europe, and the Asia/Pacific and Africa/Mideast regions. Steel and alloys will remain the dominant valve material. This study analyzes the $13.9 billion US industrial valve industry, with forecasts for 2011 and 2016 presented by type and market. It also evaluates market share and profiles major manufacturers.

#2205 .... 05/2007 .... $4400

World Commercial Refrigeration Equipment

World commercial refrigeration equipment demand will rise 4.8% yearly through 2010. Developing Asian countries will outpace the global average, led by China and India. Prospects are also favorable in Eastern Europe. Reach-in and walk-in coolers and freezers will be the fastest growing types. This study analyzes the $21.3 billion world commercial refrigeration equipment industry for 2010 and 2015 by product, world region and for 27 countries. It also evaluates market share and profiles major players.

#2141 .... 01/2007 .... $5400

Need analysis on a topic not covered by Freedonia Industry Studies? Call Customer Service for details on **Freedonia Custom Research**

ORDER FORM

Click here to purchase online

Name: ____________________

Title: ____________________

Company: ____________________

Division: ____________________

Street: ____________________
(no PO Box please)

City/State/Zip: ____________________

Country: ____________________

Phone: ____________ Fax: ____________

e-mail: ____________________

TITLE	PRICE
Commercial Refrigeration Equipment	**$4500**
☐ Corporate Use License (add to study price)	+ $2300
__ Additional Print Copies @ $500 each	

Total (including selected options): $__________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # ____________ MONTH YEAR Expiration Date

Signature: ____________________

INQ-2365