

Industrial Refrigeration System Market with COVID-19 Impact Analysis by Component (Compressor, Condenser, Evaporator), Application (Fruit & Vegetable Processing, Refrigerated Warehouse), Refrigerant Type, and Region - Global Forecast to 2026

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Abstracts

The global industrial refrigeration system market is estimated to grow from USD 19.4 billion in 2021 to USD 25.1 billion by 2026 at a CAGR of 5.3% during 2021–2026. The growth of the industrial refrigeration system market is driven by factors such as the rising demand for innovative and compact refrigeration systems; increasing government support to strengthen cold chain infrastructure in developing countries; and growing inclination toward eco-friendly refrigerant-based refrigeration systems due to stringent regulatory policies.

“Compressor segment is estimated to hold the largest share of the market during the forecast period”

The compressor segment of the industrial refrigeration system market is estimated to register the largest market share in 2026, by component. In industrial refrigeration systems, compressors play a vital role by increasing refrigerant vapor pressure in a condenser to ensure suitable temperature for food storage and preservation applications, thereby propelling the refrigerant compressor market growth. Reciprocating and screw compressors are mainly used in industrial refrigeration systems. However, an increase in the demand for screw compressors has been witnessed owing to various benefits such as high reliability, less frequent maintenance, and compactness offered by them. Also, screw compressors do not have high

discharge temperatures. With the increase in the application areas of industrial refrigeration systems, companies are developing new compressors to meet the diverse needs of customers and explore the untapped market, which is expected to drive the market for compressors during the forecast period.

“CO₂-based refrigeration systems to register higher CAGR during the forecast period”

The industrial refrigeration system market for CO₂-based refrigeration systems is projected to register the higher CAGR during the forecast period, by refrigerant type. The key factor for the market's growth is the rising popularity of CO₂ cascade refrigeration systems in various applications. CO₂ is abundant and stays in the atmosphere for a longer time. Large CO₂-based industrial refrigeration systems are less expensive to build than their glycol counterparts; thus, the initial and life cycle costs of CO₂-based industrial refrigeration systems are comparatively low. Moreover, all these advantages, coupled with increasing awareness about the thermodynamic properties of CO₂ refrigerants, are expected to propel the market for CO₂-based refrigeration systems.

“Refrigerated warehouse segment is estimated to hold the largest share of the market during the forecast period”

The refrigerated warehouse segment of the industrial refrigeration system market is estimated to register the largest market share in 2026, by application. The ever-growing population and rising demand for frozen and processed food have resulted in an increase in the number of refrigerated warehouses, globally, with improved capacity in the last few years. According to the Global Cold Chain Alliance (GCCA), the total capacity of refrigerated warehouses worldwide was 616 million cubic meters in 2018. The Indian government is promoting the creation of cold chain facilities through its Scheme for Cold Chain, Value Addition and Preservation Infrastructure, and the Scheme of Mega Food Park. These initiatives toward strengthening cold storage and warehousing infrastructure facilities in developing countries are expected to support the growing use of industrial refrigeration systems in refrigerated warehouse applications during the forecast period.

“APAC is projected to become the fastest geographical market between 2021 and 2026”

The market in APAC is expected to grow at the highest CAGR during the forecast period. The market's growth can be attributed to the growing pharmaceutical industry in

the region, coupled with government subsidies for improving the cold chain and preservation infrastructure. Refrigerated storage capacities are growing in APAC countries such as India, China, and Japan. Additionally, increasing disposable incomes and the ever-growing population are propelling the demand for processed food products and beverages in the region. As a result, there is an increase in the number of food processing facilities in APAC, which, in turn, is expected to drive the market for industrial refrigeration systems market.

Breakdown of profiles of primary participants:

By Company: Tier 1 = 45%, Tier 2 = 30%, and Tier 3 = 25%

By Designation: C-level Executives = 40%, Directors = 35%, and Others (sales, marketing, and product managers, as well as members of various organizations) = 25%

By Region: Americas = 45%, Europe= 30%, APAC=15%, and ROW=10%

Major players profiled in this report:

The industrial refrigeration system market is dominated by a few established players such as Johnson Controls (Ireland), Emerson Electric Co. (US), GEA Group Aktiengesellschaft (Germany), Danfoss (Denmark), and Mayekawa (Japan).

Research coverage

This report offers detailed insights into the industrial refrigeration system market based on component (compressor, condenser, evaporator, control, vessel, pump, valves, & auxiliary equipment), refrigerant type (ammonia, CO₂, others (HFC, HCFC, HFO, HC)), application (fruit and vegetable processing; beverage processing; refrigerated warehouses; chemical, petrochemical, and pharmaceutical; dairy and ice cream processing; meat, poultry, and fish processing; and refrigerated transportation), and region (North America, Europe, Asia Pacific (APAC), and Rest of the World (RoW) which includes the Middle East and Africa (MEA)) and Africa.

The report also provides a comprehensive review of industrial refrigeration system market drivers, restraints, opportunities, and challenges in the market. The report also covers qualitative aspects in addition to the quantitative aspects of these markets.

Key Benefits of Buying the Report

The report will help the leaders/new entrants in this industrial refrigeration system market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the industrial refrigeration system market and provides them information on key market drivers, restraints, challenges, and opportunities.

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*Details on Business Overview, Products/solutions/services offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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