



# AREAVISION2025



## **ABOUT AREA**

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AREA is the European association of refrigeration, air conditioning and heat pump contractors. Contractors are the essential link between end users and manufacturers. They design, install and maintain refrigeration, air conditioning and heat pump equipment using every available solution with complete neutrality towards equipment and refrigerants, in the sole aim of ensuring the highest level of reliability, energy efficiency and cost-effectiveness.

## **AREA**

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### **IN A NUTSHELL**

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**25 national associations**

**22 countries**



**13,000 companies**

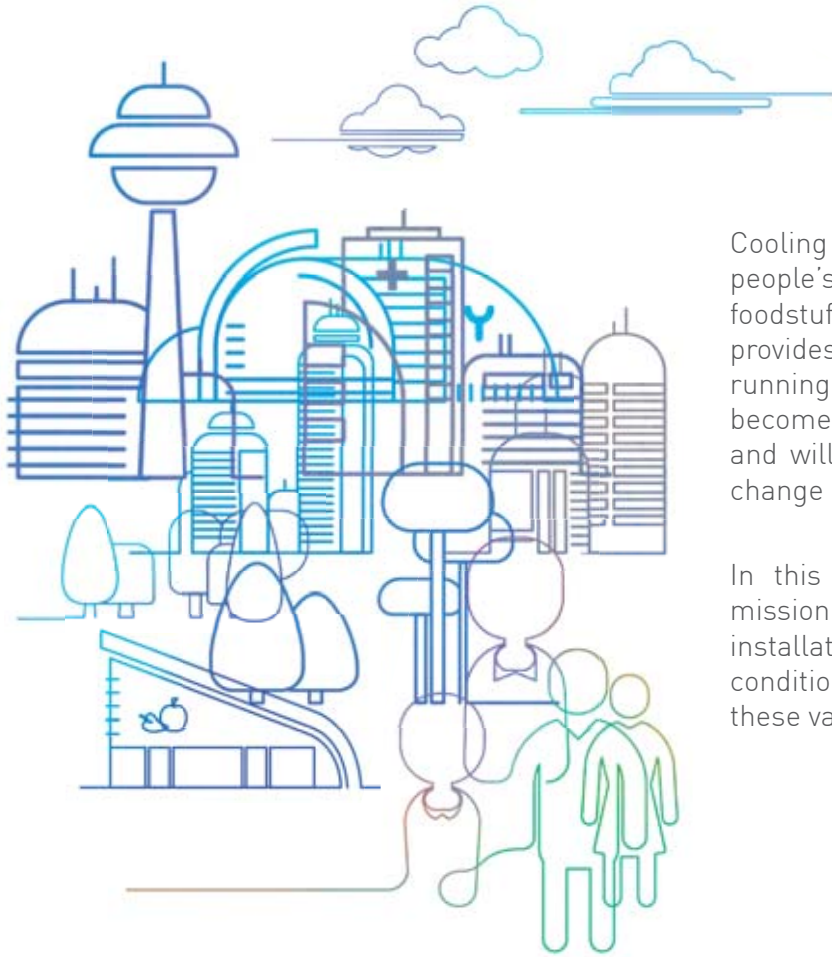
**110,000 people**



**€23bn turnover**



# COOLING FOR A BETTER LIFE



Cooling is essential to modern life and it makes people's lives better: refrigeration preserves foodstuff and vaccines whilst air conditioning provides thermal comfort and keeps data centres running. Versatile and omnipresent, cooling has become absolutely critical to people's well-being and will be even more so in the face of climate change and digital transformation.

In this context, contractors fulfil an essential mission: they ensure the proper design, installation and functioning of the refrigeration, air conditioning and heat pump systems that satisfy these various societal needs.

# CURRENT CONTEXT

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The refrigeration, air conditioning and heat pump contracting sector is undergoing profound changes driven by 4 main factors:

## **Increased demand for cooling**

Changes in people's lifestyle, digital transformation and climate change result in a surge of the demand for cooling. Such a trend will accelerate in the coming years.

## **Sustainable cooling**

Whilst the need for cooling increases, its impact on the environment conversely decreases under the combined effect of several factors: transition towards alternative refrigerants with low global warming potential (GWP), decarbonisation and circular economy measures, technological developments and increased competence of personnel.



# AND LOOKING FORWARD

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## **Technological developments**

Plug-and-play equipment, essentially unserviceable, is growing in numbers. However, the biggest change our sector faces certainly lies in the industry's transition from product-based towards a system approach: versatile systems working with different energy sources and adapting to weather and climate conditions, and more technologically advanced systems integrating artificial intelligence abilities.

## **Attracting, retaining and upskilling personnel**

As demand for cooling increases, so does the need for personnel. Yet, attracting and retaining talents is challenging. At the same time, regular upskilling is necessary to adapt to fast technological developments.

In this context and with a new EU political cycle starting, AREA would like to present its strategic vision for the European refrigeration, air conditioning and heat pump contracting industry for the next 5 years. This also follows on from the Vision 2020 presented in 2014.





# OUR VISION

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## Refrigerants

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*'succeeding in the transition towards alternative refrigerants'*

The Kigali Amendment to the Montreal Protocol has set ambitious global targets on HFC consumption reduction. In Europe, the transition towards low GWP alternative refrigerants has already started under the F-Gas Regulation. The European refrigeration, air conditioning and heat pump contracting industry is committed to help reduce greenhouse gases emissions thanks to highly efficient alternatives handled safely by competent personnel.

To support the transition towards alternative refrigerants, we will:

- >>> Support initiatives aimed at tackling refrigerants' availability and illegal trade*
- >>> Promote mandatory certification for alternative refrigerants*
- >>> Support a balanced approach between environmental effectiveness and safety imperatives*



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## Sustainable Innovation

*'supporting energy and resource efficiency principles in a lifecycle approach'*



Installers can play a key role in the decarbonisation efforts by designing refrigeration systems that are both energy efficient and that use refrigerants with a low GWP. AREA will support the different interlinkages between the decarbonisation of the sector (more energy efficient systems, using renewable energy resources) and the introduction of Circular Economy criteria (durability, reparability, recyclability of materials).

We will work to support decarbonisation in our industry by:

- >>> Promoting energy efficiency gains that can be achieved through proper design, installation and maintenance of refrigeration systems*
- >>> Encouraging life-cycle assessments of refrigeration systems to measure the sustainability of systems throughout their lifetime*
- >>> Ensuring that sustainability of the refrigeration and air conditioning sector remains high on the political agenda*

# OUR VISION

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## Human Capital

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*'supporting members in attracting and retaining skilled personnel'*

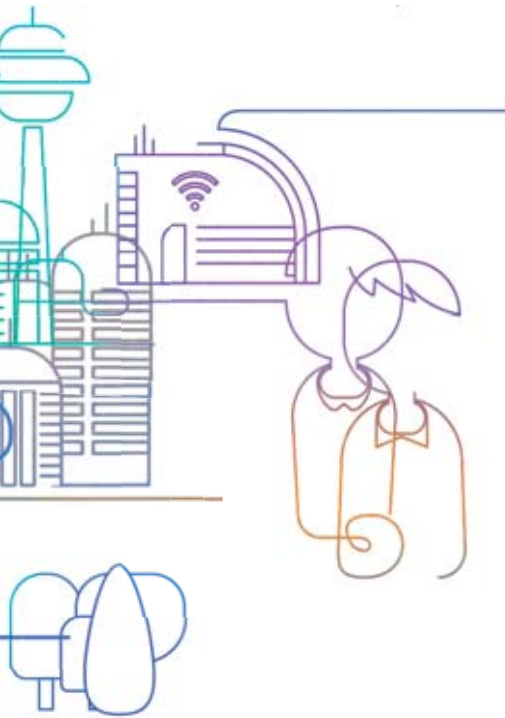
Human capital certainly is contractor's most valuable asset. Yet, it is also the most fragile one. As demand for cooling increases, so does the need for qualified personnel. Like many other industries, refrigeration and air conditioning contractors find it challenging to attract and retain new talents. Reasons are numerous, ranging from misperceptions to a lack of visibility of the sector and of understanding of its technological edge and societal purpose.

To attract and retain new talents, we will:

- >>> Highlight the industry's societal purpose and positive contribution to citizens' daily life*
- >>> Put forward the technological dimension of the industry, where digitalisation is an integral aspect of many working tasks*
- >>> Promote a more inclusive workforce, notably attracting more women in the profession*
- >>> Emphasise the numerous career advancement opportunities that the sector has to offer*







The industry is also experiencing profound changes under the combined effect of digital transformation and the transition towards alternative refrigerants. More than ever, regular upskilling is necessary to maintain the high level of expertise that the industry takes pride for.

To continuously enhance personnel's competence, we will:

- >>> Promote lifelong learning and strong vocational training curricula to address digital transformation and the transition towards alternative refrigerants*
- >>> Work to ensure that education systems match industry's evolving needs as the sector is moving from mechanical (products) to digital/automation (smart and innovative systems)*
- >>> Facilitate the exchange of information and best practices among members*

# OUR VISION

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## Framework Conditions

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***'promoting a coherent and supportive regulatory and standardisation framework'***

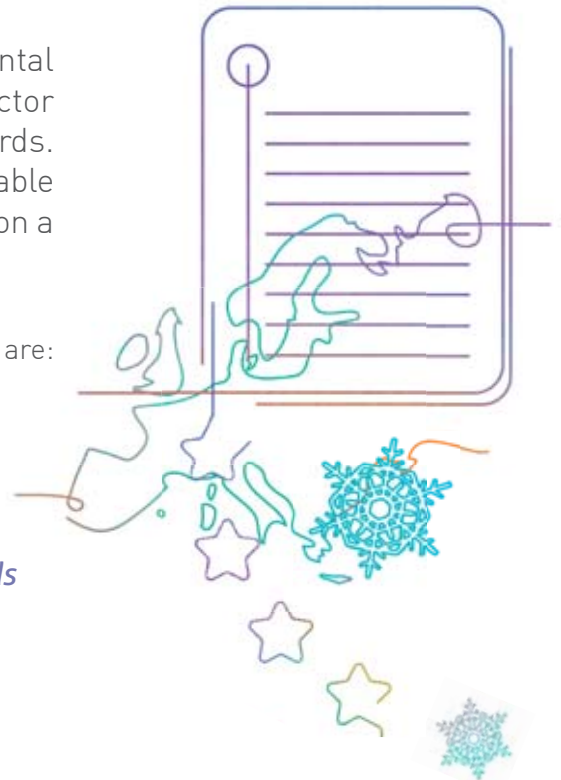
Because of its technological feature and environmental dimension, the refrigeration and air conditioning sector falls under a large amount of legislation and standards. Consequently, industry's success with refrigerants, sustainable innovation and human capital depends to a large extent on a coherent and supportive framework.

We will work for competence, safety and product standards that are:

- >>> *Consistent with the regulatory framework*
- >>> *Supporting contractors' trading landscape*

We will work for a supportive legal framework:

- >>> *At national level, by supporting our members towards their national authorities*
- >>> *At EU level, through advocacy, networking and cooperation*
- >>> *At international level, by collaborating with both institutional and industry stakeholders*



# LOOKING TOWARDS 2030

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In a continuously evolving working environment, the cooling sector is already looking further ahead. Whereas this Vision & Strategy paper is focused on the medium term, we are already identifying longer term trends and opportunities for the industry.



A future where:

>>> *We will have moved from owning equipment to renting thermal conditions (e.g. comfort temperature levels at home, in a refrigeration plant).*

>>> *We will have achieved a more uniform education framework.*

>>> *Refrigeration and air conditioning equipment will be smarter and more connected to achieve optimal efficiency from an energy, environmental and comfort point of view.*

>>> *AREA will have increased its representativeness at European level and international outreach.*

*The future starts now, let's write it together.*

AREA

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