MONTREAL PROTOCOL

ON SUBSTANCES THAT DEPLETE

THE OZONE LAYER

UNEP

REPORT OF THE
TECHNOLOGY AND ECONOMIC ASSESSMENT PANEL

SEPTEMBER 2013

VOLUME 2

DECISION XXIV/7 TASK FORCE REPORT
ADDITIONAL INFORMATION TO ALTERNATIVES ON ODS

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On Substances that Deplete the Ozone Layer

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The text of this report is composed in Times New Roman.

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Layout:	Lambert Kuijpers, Katerina Gargalasis, Paul Ashford and UNEP's Ozone Secretariat
Reproduction:	UNON Nairobi
Date:	September 2013

Under certain conditions, printed copies of this report are available from:

UNITED NATIONS ENVIRONMENT PROGRAMME
Ozone Secretariat, P.O. Box 30552, Nairobi, Kenya

This document is also available in portable document format from
http://ozone.unep.org/new_site/en/assessment_panels_main.php

Printed in Nairobi, Kenya, 2013.

ISBN: 978-9966-20-017-4

UNEP
SEPTEMBER 2013 REPORT OF THE TECHNOLOGY AND ECONOMIC ASSESSMENT PANEL

VOLUME 2

DECISION XXIV/7 TASK FORCE DRAFT REPORT
ADDITIONAL INFORMATION ON ALTERNATIVES TO ODS

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ACKNOWLEDGEMENT

The UNEP Technology and Economic Assessment Panel and the XXIV/7 Task Force co-chairs and members wish to express thanks to all who contributed from governments, both Article 5 and non-Article 5, furthermore in particular to the Ozone and the Multilateral Fund Secretariat, as well as to a large number of individuals and organisations involved in Protocol issues, without whose involvement this assessment would not have been possible.

The opinions expressed are those of the Panel and its Task Force and do not necessarily reflect the reviews of any sponsoring or supporting organisation.

The TEAP and its XXIV/7 Task Force thank the Academy for Fire Protection in Moscow, Russian Federation, for hosting the TEAP meeting, 9-12 April 2013 where inputs from Parties were reviewed, the outline for a draft report was discussed and proposals were made for a next round of drafting in April 2013, after which reviews took place by email circulation during the first week of May 2013. The draft report was then made available to the Parties, who commented during and after the 33rd OEWG meeting in Bangkok, June 2013. All comments were taken on board in finalising the report, which was done via email circulation. The final Task Force report was then again circulated to all Task Force members and to TEAP for a final review round in August 2013. Thanks are indebted to all reviewers. The report was subsequently submitted to Parties for consideration at the MOP-25 in Bangkok, October 2013.

Foreword

The May 2013 TEAP Report

The May 2013 TEAP Report consists of three volumes:

Volume 1: May 2013 TEAP Progress Report

Volume 2: September 2013 TEAP XXIV/7 Task Force Report

Volume 3: May 2013 TEAP XXIV/8 Task Force Report

Volume 1
Volume 1 contains the MTOC essential use report, progress reports, the MB CUN report etc.

Volume 2
Volume 2 is the Report of the TEAP XXIV/7 Task Force on additional information on alternatives to ozone-depleting substances. A draft report was made available May 2013, the final report was made available the beginning of September 2013.

Volume 3
The separate Volume 3 of the TEAP Progress Report contains the report of the Task Force responding to Decision XXIV/8.

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UNEP
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DECISION XXIV/7 DRAFT TASK FORCE REPORT
ADDITIONAL INFORMATION ON ALTERNATIVES TO ODS

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Executive Summary

Introduction

This Final Report builds on the Draft Report on Decision XXIV/7 presented to the 33rd meeting of the Open Ended Working Group in June 2013 and has sought to accommodate the helpful comments provided by Parties and other stakeholders at that meeting. It has been substantially restructured to separate out the consideration of 'what could have been avoided' (now Chapter 3), a substantial and updated review of alternatives as required by Clause 1 of the Decision (now Chapters 4, 5, 6 and 7) and also a summary of 'what could be avoided' between now and 2020 (now Chapter 8). As directed, the Task Force has sought to focus its additional efforts on further analysis of the current situation and future opportunities.

In restructuring the Report, the Task Force has also sought to address some methodological deficiencies of the Draft Report. In particular, it has refined its interpretation of Technical Feasibility and Commercial Availability (e.g. by the introduction of Technical Readiness Levels) in such a way as to recognise more specifically the circumstances of high ambient temperatures and high urban population density, both of which were highlighted at the discussions that took place at the 33rd Open Ended Working Group meeting. Inclusions and changes of emphasis are summarised in Chapter 2.

Refrigeration and air conditioning

In Chapter 3, a number of considerations are given to 'what could have been avoided'. Domestic refrigeration and mobile air conditioning are the subsectors highlighted; here the conversion away from ODSs has been completed and low GWP alternatives have been applied or considered for quite some time. This is continued in Chapter 8 with a determination of amounts 'that could be avoided' for the two main refrigeration and air conditioning subsectors cases where servicing plays an important role. In Chapter 4, an updated review of alternatives is given. Initially, the chapter provides generic information relating to selected **alternative substances**. This includes a description of five classes of alternatives:

- Ammonia (R-717)
- Carbon dioxide (R-744)
- Hydrocarbons (HC-290 and others)
- HFCs (medium and high GWP), and
- HFCs (low GWP)

For each alternative, general efficiency aspects, cost effectiveness and barriers and restrictions are given. Subsequently, additional information, including current trends, is presented in the sub-sector specific sections that follow, wherever applicable. For this report it was considered under the current circumstances to discuss a small number of currently unassigned refrigerant blends where it is anticipated that they are close to commercialisation and receiving R-number designations.

In **domestic refrigeration**, the main refrigerants used are hydrocarbon HC-600a (isobutane) and HFC-134a. More than 50% of current new production (globally) employs HC-600a, the remainder uses HFC-134a. HC-600a continues to be the main alternative to HFC-134a. Concerns in connection with the high flammability no longer exist for the low charges applied. No new alternative has matured to become energy-efficient and cost-competitive. Considering the product costs, HC-600a is less expensive than HFC-134a, but additional investment cost for HC-600a products are due to the larger size of compressors. Production cost for refrigerators can be higher due to the requirements for safety systems.

Initial developments to assess HFC-134a replacement with HFC-1234yf have begun, but is not being pursued as a high priority. Still HFC-1234yf has demonstrated the potential for comparable efficiency to HFC-134a. The lower flammability makes its application easier in countries with strong reservations about HC-600a. R-744 (CO_2) is also being evaluated, but its application implies additional costs.

In **commercial refrigeration** stand-alone equipment HFC-134a and R-404A are still the dominant refrigerants. HC-600a and HC-290 are used for small commercial equipment with refrigerant charges varying from 15 g to 1.5 kg. R-744 is mainly used in vending machines; the technology is operating well but it is a technical challenge and only one supplier is able to provide an efficient system. The small additional cost associated with safety in HC equipment is integrated in the price, and is not much different compared with HFC equipment. Where it concerns low GWP HFCs, HFC-1234yf can replace HFC-134a in any application. Due to its comparable energy-efficiency with HFC-134a, vending machines with HFC-1234yf have been introduced in countries such as Japan (two manufacturers).. Currently a main barrier is still (the wide) availability of the chemical.

Regarding condensing units, some new R-744 based units are sold in northern Europe, but the penetration in the market is slow. Several indirect condensing units with HC-290 or HC-1270 are operating in Europe with typical refrigerant charges varying from 1 to 20 kg, with good energy efficiency. Costs for these HC based systems are typically 5 to 15% higher compared with HFC systems.

HFC-134a, R-404A, and, at a small level, R-410A are HFCs of choice for condensing units. As in all other commercial applications, high GWP HFCs are seen as short-term options.

The preferred option for large European commercial companies is HFC-134a at the medium-temperature level (-10 to -15°C) cascading with a R-744 direct system for the low temperature (-35 to -38°C) since it is a global option for all climates.

Ammonia is used in indirect centralised systems for large capacities; usually R-744 is used at the low-temperature level. Due to safety issues the number of installations so far is limited. For applying lower GWP options, HFC-134a can be replaced by HFC-1234yf or HFC-1234ze where the lower flammability of these refrigerants can be addressed during the design stage. For non-flammable options, small temperature-glide blends --such as N-13 and XP-10-- can also be used in existing facilities For the non-low GWP refrigerants, R-404A is currently the dominant refrigerant, even if it is now replaced in new installations by HFC-134a at the medium-temperature level. R-407F is proposed as an intermediate option. There are also non-flammable options with lower GWP such as the HFC blends N-40 and DR-33. Two-stage R-744 systems for the medium-temperature level and the low-temperature level have taken a certain market share in Europe and are now installed in more than 1300 stores. R-744 trans-critical cycle developments are on-going to make the technology more energy-competitive under higher ambient conditions. The additional cost is limited to 10 to 15%.

The refrigerant of choice for **transport refrigeration** systems in non-Article 5 countries is HFCs. R-404A has become a preferred choice for practically all trailers and large trucks. HFC-134a is used in small trucks and vans as well as reefer containers. Testing of low-GWP HFC and non-HFC alternatives are in progress elsewhere, but not one option seems viable in the short term. The main issue is that the performance of R-404A is difficult to meet. Current and previous tests with trucks using R-744 suggest that introduction of R-744 will be possible when more efficient compressors with more than one compression stage, which are under development, will be commercially available. The use of hydrocarbons (mainly HC-290) in truck refrigeration units has been tested; they would be the preferred choice because they can provide lower energy consumption in the order of 20% or more. HFC-1234yf can be an interesting alternative to HFC-134a due to its lower discharge temperature.

On vessels, hydrocarbons are technically feasible, but the strict safety concerns currently do not favour application of flammable refrigerants aboard. Natural refrigerants have been commercialised to a small extent aboard marine vessels worldwide. For European fishing vessels highly efficient ammonia- CO_2-cascade systems are the systems of choice.

Over 90% of the large **industrial refrigeration** installations use R-717 whereas the market share of R-717 is only 5% (India and China) to 25% (Europe and Russia) for smaller industrial refrigeration systems. Energy efficiency is in general 15% better than HFCs systems. Hydrocarbons are not widely used, other than in situations where safety measures are already required, e.g. in a petrochemical plant or in compact chillers.

In Small Self-Contained (SSC) **air conditioners** R-744 is not widely considered for use. The main barriers for SSC air conditioners are related to efficiency and cost implications, such as due to its very high operating pressure. Due to efficiency implications, the use of cooling only R-744 systems is not really feasible. However, there are developments on units for specific purposes, where both cooling and heating is needed. HC-290 has been used in portable ACs for many years and several companies are producing them. Window units are also under development. HC-290 seems to be preferred over HC-1270 for smaller capacity systems.

R-410A is used in most SSC ACs, where HCFC-22 is not used. It is feasible to use HFC-32 in SSC ACs, for example, where R-410A is already used. HFC-32 energy efficiency is similar to or a few per cent higher than HCFC-22 and R-410A although its deterioration at high ambient temperatures is a few per cent worse than HCFC-22, but not as severe as R-410A.

R-410A is most popular refrigerant for mini-split air conditioners where R-22 is phased out. HC-290 has been used in split ACs for many years on a limited scale but now several companies are developing and beginning to produce them on a larger scale. Although HC-290 seems to be the preferred HC option, HC-1270 is under evaluation by some companies. HC-290 units are available from several companies. Currently, no split air conditioners are available using R-744 or HFC-1234yf, although some studies have been carried out. One manufacturer has started producing mini-split air conditioners with HFC-32 in 2012. Another company has produced proto-type units with “L-41”.

In hot **water heat pumps and space heating heat pumps**, R-410A is most common refrigerant. R-717 is used fairly widely in capacities from 250 kW to very large/industrial-scale (>1 MW). Such systems are located outside or in special machinery rooms in order to handle the higher toxicity characteristics. As with R-717 systems in general, the main barriers are related to the minimal capacity required for cost-effectiveness and certain national regulation controlling installation. A large number of manufacturers globally are producing domestic and small commercial sized hot water heating heat pumps using R-744. Generally, the efficiency that can be achieved by R-744 in hot water heaters is equivalent to or slightly higher than HFC refrigerants even at high temperature difference condition. It is feasible to use HFC-32 in hot water heat pumps, for example, where R-410A is already used. HCs, particularly HC-290, had been used widely in Europe for small (domestic) heat pumps, and at a minor level, there are also large commercial-sized heat pumps being marketed, which use HC-290 or HC-1270. It is feasible to use HFC-32 and the L-20 blend in space heating heat pumps, but R-744 is not considered by some as a suitable refrigerant for space heating only heat pumps at the present time.

Considering the use of low-GWP refrigerants in reciprocating and screw **chillers** the following describes the current situation. R-717 is used fairly widely for process refrigeration, food storage facilities and air conditioning. The efficiency of R-717 is high for chillers in both medium and high temperature applications. The barriers for chillers are consistent with R-717 systems in general. R-744 is now used in reciprocating chillers by many manufacturers. As with other types of systems, the efficiency is compromised with increasing ambient temperatures. The main barrier for R-744 chillers is the poorer efficiency in climates with consistently higher ambient temperatures and high cost due to various reasons including its high operating pressure. Both HC-290 and HC-1270 units are produced by a number of manufacturers in Europe and some countries in other regions, although the total number is minor compared to conventional HFC technology. There are certain barriers in the case of HC applications, depending upon chiller configurations.

HFC-1234ze(E) is a refrigerant that can be used in existing HFC-134a technologies with minor modifications (compressor sizing), and it has been trialled in systems in Europe. When used in reciprocating, scroll or screw type of compressors, it produces efficiency levels comparable to HFC-134a. In centrifugal compressors, this refrigerant produces efficiency levels slightly better than HFC-134a. HCFC-1233zd(E) (a low-GWP HCFC) can replace HCFC-123 in low pressure centrifugal chillers with slightly better efficiency levels. In chiller applications, both HFC-1234ze(E) and HCFC-1233zd(E) should perform very well in warm climates, due to their high critical temperatures.

Both R-407C and R-410A are widely used in positive displacement chillers as is HFC-134a. HFC-134a is used widely in various capacities of centrifugal and screw chillers.

In **mobile air conditioning** systems), the preferred option is to shift from HFC-134a to HFC-1234yf when it is required as it is by the EU regulation, but the delayed introduction is related to several issues: global availability, flammability concerns, regulation and. Other future options are still being reconsidered by certain car manufacturers; in fact R-744, while staying with HFC-134a until R-744 would have been commercialised. R-744 has been demonstrated to be as efficient as the best in class HFC-134a system except under high ambient conditions (above 35°C). However, the main barriers for R-744 systems have been costs, reliability and servicing aspects..

In developed countries, the change from HFC-134a to HFC-1234yf seems to be the likely solution because the car industry favours global options for AC systems. HFC-134a is currently the only refrigerant in use except the refilling of existing AC systems with HFC and HC blends
In public transports, the two dominant refrigerants are currently HFC-134a and R-407C in developed countries and HFC-134a and HCFC-22 in developing countries. Future options to be considered includeHFC-1234yf, R-744, new blends, possibly the air cycle.

In order to calculate amounts that can be avoided, a certain BAU case has been developed using a number of assumptions:

- a certain consumption pattern during the period 1995-2012 for the subsectors
- a certain consumption pattern in separate Article 5 and non-Article 5 countries, which determines the specific starting point of 2012 (in tonnes for the various refrigerants in the various subsectors)
- a conservative servicing percentage (of the existing bank) of 15% per year
- an economic growth (and an extrapolated economic growth) taken from percentages over the period 2005-2012 (for separate countries or separate groups of countries)

The important subsectors considered are commercial refrigeration and stationary air conditioning.

All countries, stationary air conditioning

	Total consumption (ktonnes)				Total consumption (Mt CO_2-eq)			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)*
2015	354.6	220.0	35.6	610.1	634.6	431.9	17.6	**1084.1 (1136.3)**
2020	255.8	249.9	132.1	637.9	457.9	492.0	65.3	**1015.3 (1113.9)**
Aggregated 2013-20	2600.6	1832.8	524.3	4957.8	4655	3601	259	**8515 (9288)**

All countries, commercial refrigeration

	Total consumption (ktonnes)				Total consumption (Mt CO_2--eq)			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	157.3	90.2	18.8	266.3	281.7	268.1	3.6	**553.4 (653.4)**
2020	195.5	114.0	66.9	376.4	350.0	278.9	13.4	**642.3 (875.6)**
Aggregated 2013-20	1349.7	778.7	269.9	2398.3	2417	2170	53.0	**4640 (6245)**

	Total consumption (ktonnes)				Total consumption (Mt CO_2-eq)			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	511.8	310.2	54.3	876.3	916.3	700.0	21.2	**1637.5 (1740.7)**
2020	451.4	363.9	199.1	1014.3	807.9	770.9	78.7	**1657.6 (2085.7)**
Aggregated 2013-20	3950.3	2611.5	794.2	7356.0	7072	5771	312	**13155 (15533)**

* Note; the amounts given in parentheses are the ones without using (lower GWP) alternatives

Looking at the totals for 2020 it can be observed that

- stationary air conditioning is twice as large as commercial refrigeration in ktonnes
- stationary air conditioning is 30% larger than commercial refrigeration without the application of lower GWP alternatives, is about 50% larger with the application of lower GWP alternatives

Looking at the aggregated values it can be observed that

- stationary air conditioning is about twice as large in ktonnes, about 50% larger in Mt CO_2-eq. if commercial refrigeration would apply HFCs
- stationary air conditioning would (again) be twice as large in Mt CO_2-eq. if a large amount of lower GWP alternatives would be used instead of the refrigerants R-404A and R-507.

In total, for all countries, for both new manufacture and servicing, 794 ktonnes can be avoided during the period 2013-2020, which is 11% of the total (7356 ktonnes). During that same period 2378 Mt CO_2-eq. can be avoided, which is more than 15% of the total.
It should be realised that these numbers are derived for 15% servicing. Should this percentage be substantially higher, the amounts that can be avoided calculated in percentages would decrease. This could be a subject for a more detailed scenario analysis.

Aggregated for the period 2013-2020, for all countries, both non-Article 5 and Article 5, 184 ktonnes of refrigerants (with higher GWP) can be avoided from a total of 1304 ktonnes, which equals 14%. Expressed in Mt CO_2-eq. for that same period, 247 Mt CO_2-eq. can be avoided from a total of 1791 Mt CO_2-eq., which equals 13.8% (the numbers should be more or less the same, since it only concerns amounts of HFC-134a that can be avoided, by a mix of low GWP alternatives, which give a very small contribution in Mt CO_2 eq.). It should be emphasised here that the percentage of the amount that can be avoided for non-Article 5 countries would be higher than for Article 5 countries (17% vs. about 10%, in Mt CO_2-eq., aggregated over 2013-2020).

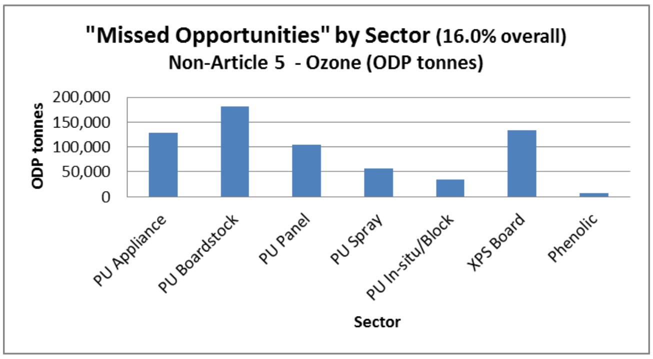
Foams

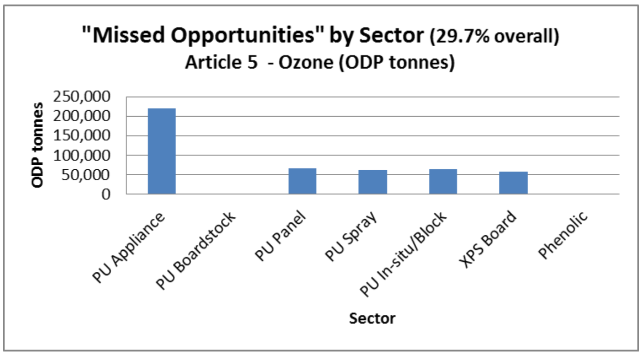
The foams sector has made transitions from its CFC baseline, through HCFCs in some cases, to either high-GWP or low-GWP non-ozone depleting solutions. As of 2013, the residual reliance on HCFC use in Article 5 regions rests to some extent in polyurethane appliance foams, but mostly in PU Spray and XPS Board.

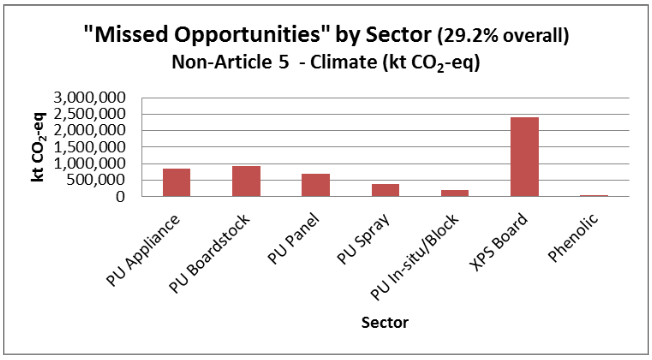
It is important to note that, of the 5.6 million ODP baseline footprint[1] of the foam sector between 1990 and 2012, over 80% of the footprint was avoided. Similarly, for a cumulative baseline climate footprint of 26.3 billion tonnes CO_2-eq over 66% has been avoided. This assessment has taken the rather stringent approach of not correcting for the 10 year grace period given to Article 5 Parties, so the avoided baseline percentages against regulatory requirements are considerably higher. A similarly stringent approach has been taken with respect to the availability of non-ozone depleting alternatives and low-GWP solutions.

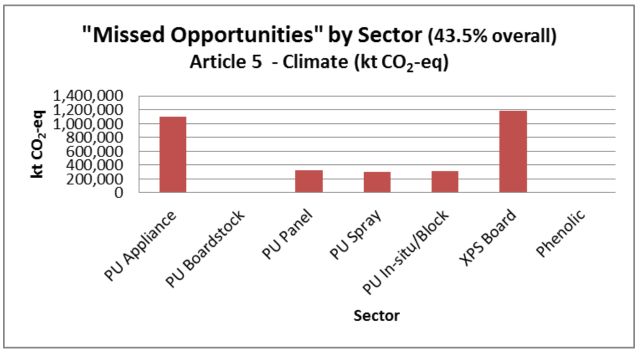
[1] That which would have occurred if not action had been taken on ozone depleting substances.

It has effectively been assumed that these were available throughout the period of analysis and thereby the analysis over-estimates the 'missed opportunities' in order to place a worst case perspective to the data generated and avoid subjective scenarios. The following graphs illustrate the missed opportunities analysed in this way for both ozone and climate:









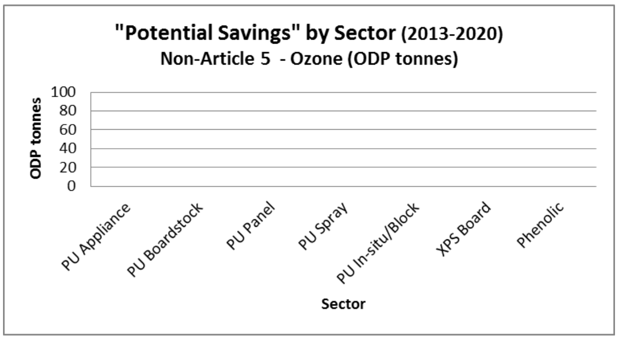
The reasons for these 'missed opportunities', especially for the XPS board sector, are fully explained in Chapters 3 & 5. It remains difficult to identify significant areas where the transition process could have been accelerated substantially given the constraints faced. It should also be noted that the effect of changes in thermal performance have not been factored into the climate assessment in view of the complex and non-determinable usage patterns to which most building insulation foams are subject.

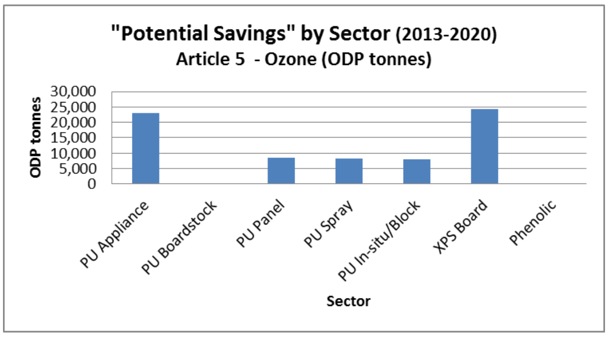
As of 2013, the proportion of blowing agent being consumed by sector that can be considered as high-GWP is shown in the following table. It can be seen that some sectors have virtually completed their phase-out while others still have major hurdles to overcome. Particular examples are the PU Spray Foam and XPS Board sectors, where major product and processes challenges remain. In general, the remaining challenges are greater in Article 5 Parties where there is often less to be gained from economies of scale.

	non-A5	***A5***
PU Appliance	41.34%	41.34%
PU Boardstock	2.48%	0.00%
PU Panel	44.68%	78.60%
PU Spray	99.63%	100.00%
PU In-situ/Block	36.08%	99.64%
XPS Board	81.84%	99.98%
Phenolic	15.98%	32.51%
Total	***35.61%***	***48.37%***

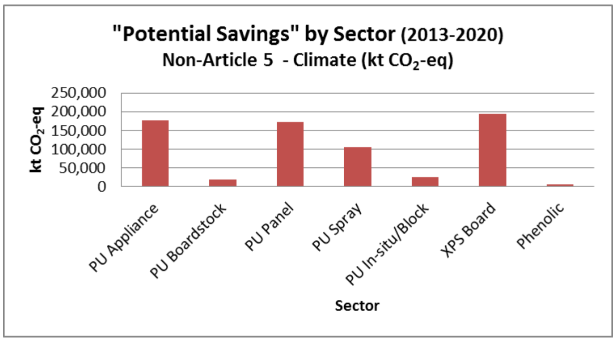
Many of these sectors are still reliant on the emergence of a new generation of alternatives which can display the performance associated with their high-GWP counterparts while delivering limited direct global warming impact. In particular, unsaturated HFCs (HFOs) are likely to have a strong role to play, with other emerging blowing agents, such as methyl formate, meeting some of the more specific niche applications. Drivers in non-Article 5 Parties will be market and regulatory pressure, while the main driver in Article 5 Parties will be the phase-out of HCFCs under the Montreal Protocol through the implementation of HCFC Phase-out Management Plans.

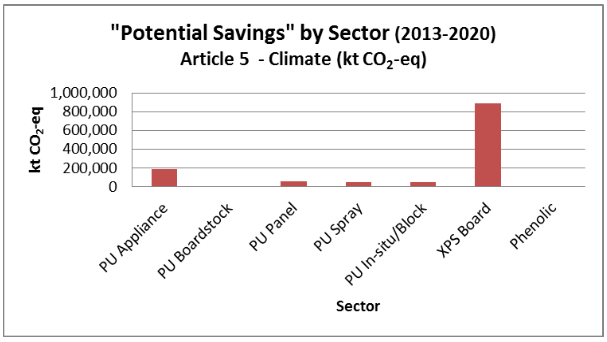
Moving forward to assess the potential for further avoided consumption, the period of assessment has been limited to 2013-2020 in view of the uncertainties surrounding market growth in the foam sector beyond that date. However, it should be noted that the potential savings will be under-estimated by taking this relatively cautious approach. The following four charts show the potential savings available assuming an immediate transition in 2013. While recognizing that this is not possible in most cases, it does compensate to some extent for the relatively short assessment period:





Again, it should be noted that, although these savings are assumed to remove all of the remaining ozone and climate impacts for the period 2013-2020, the ozone-related savings represent only 2.3% of the footprint that would have existed without the Montreal Protocol. Similarly, the removal of the remaining climate impacts only represents 13.3% of the climate footprint that would have existed without the Montreal Protocol.





With HCFC Phase-out Management Plans now well into their first phase, it is clear that most of the significant sectors identified in Article 5 Parties are already being addressed. However, this is not necessarily the case in non-Article 5 Parties where the drivers for further transition need to come from the climate agenda, bearing in mind that the phase-out of ozone-depleting substances is already complete. Apart from the market and regulatory intervention mentioned earlier, one of the key drivers may ultimately be the improvement in thermal efficiency offered by low-GWP substitutes such as unsaturated HFCs, unsaturated HCFCs or blends containing them.

It is clear that the timing of further transitions is less critical to the environment than was the case for CFC phase-out, where delay had substantial consequences. There are still some difficult transitions to address (e.g. in the XPS sector) and it may be that waiting for the maturing of emerging technologies will offer better long-term solutions than forcing the transition too soon. Where this is unavoidable because of ODS phase-out commitments, it may still be better to consider a low-cost interim solution in order allow for a subsequent transition.

Having reviewed the potential for avoided consumption, this Report has also sought to make some assessment of the percentage reduction of cumulative consumption that might be realistically achieved in the 2013-2020 period. The following table illustrates those outputs:

	Cumulative High-GWP Consumption to 2020				*Est. % Avoidance*		*Estimated Avoided Consumption to 2020*			
	Non-Article 5		Article 5		Non-A5	A5	Non-Article 5		Article 5	
	tonnes	*ktCO2-eq*	*tonnes*	*ktCO2-eq*			*tonnes*	*ktCO2-eq*	*tonnes*	*ktCO2-eq*
PU Appliance	159,132	176,652	225,420	189,564	55%	75%	87,523	97,158	169,065	142,173
PU Boardstock	17,054	19,747	-	8	50%	50%	8,527	9,874	-	4
PU Panel	148,542	172,550	77,374	54,710	50%	40%	74,271	86,275	30,950	21,884
PU Spray	103,966	105,824	75,895	53,582	25%	25%	25,992	26,456	18,974	13,395
PU In-situ/Block	26,881	25,910	71,839	50,711	25%	25%	6,720	6,478	17,960	12,678
XPS Board	202,705	192,878	457,667	891,499	10%	25%	20,271	19,288	114,417	222,875
Phenolic	5,196	4,978	408	282	50%	50%	2,598	2,489	204	141
Total	***663,476***	***698,539***	***908,603***	***1,240,356***			***225,901***	***248,017***	***351,569***	***413,150***
							34.05%	*35.51%*	*38.69%*	*33.31%*

In summary, the foam sector might be expected to deliver a further 575,000 tonnes of avoided high-GWP blowing agent consumption yielding approximately 660,000 ktCO$_2$-eq of additional climate benefit beyond business-as-usual by 2020, with further benefits to accrue thereafter.

Fire protection

Ozone depleting substances (ODS) used as fire extinguishants possess unique efficacy and safety properties that serve as a basis of fire protection systems where the application of water (by hose stream or sprinkler heads), dry chemical agents, or aqueous salt solutions is problematic. This is especially true in high-value, commercial electronics environments and in military systems, to name only two of many applications where such systems had many serious technical disadvantages.

Commercially available, technically proven alternatives to ODS for Fire Protection have been developed and include: halocarbon agents, e.g., HFCs and a fluoroketone (FK); inert gases, e.g., nitrogen and argon and their blends; carbon dioxide; water mist technologies; inert gas generators; fine solid particles (powders); dry chemicals; and aqueous film-forming foam. Several environmentally sound alternatives to ODS fire extinguishing agents for both total flooding and local applications uses have been introduced to the market. If an environmentally sound alternative agent works in any specific application, there is no barrier to its adoption other than economic considerations. Additional environmentally sound alternatives are presently under development that may increase the number of applications where environmentally sound alternatives are technically viable but it is too soon to make any realistic assessments.

The production of PFCs and HFCs for use in fire extinguishing systems and portable fire extinguishers as well as the production of alternatives (without negative environmental impacts) to these agents for uses in the same applications is performed by very few manufacturers, all of whom treat the information on their historical, present and projected production as proprietary. Without a clear understanding of these production levels for the alternatives without negative environmental impacts, and also for the PFCs and HFCs, there is no basis for making a sound judgment about the overall utility of any alternatives in replacing PFCs and HFCs in the fire protection sector.

Nevertheless, we can say that the fire protection community has acted responsibly in dealing with what have turned out to be unsuitable alternatives from an environmental impact perspective. The availability of several HFCs that collectively could perform as well as the PFCs in certain applications, and at the same time present a more favourable environmental impact, led to the collapse of the use of PFCs in those applications.

However, the need for chemical agents remains as inert gases, water mist and other agents are not suitable for many fire protection applications that had previously used halon. HFCs have filled that role and, since about 2005, a fluoroketone (FK) has increasingly become more accepted. The fire protection industry is still evaluating alternatives that have low environmental impacts. In addition, the Halons Technical Options Committee is assessing regional biases in fire protection agent, systems and costs across the spectrum of available choices.

The use of HCFCs in fire protection is declining, with the only total flood agent being provided for the maintenance of legacy systems that are themselves phasing out. Only HCFC-123 is used in any quantity in portable extinguishers. However, if the development of 2-Bromo-3,3,3-trifluoropropene proves to be commercially successful, owing to its fire extinguishing characteristics being closer to halon 1211 and it having a low environmental impact, means that it would be the natural replacement for HCFC-123 and halon 1211 – particularly in the aviation industry.

Solvents

The HCFC solvents currently used are HCFC-141b and HCFC-225ca/cb with ODP of 0.11 and 0.025/0.033 and GWP-100yr of 713 and 120/586, respectively. The elimination of HCFCs from solvent applications still leaves many options available. Many alternative solvents and technologies developed so far since 1980s are the candidates for HCFC alternatives, which include, not- in kind technologies such as aqueous cleaning, semi-aqueous cleanings, hydrocarbon and alcoholic solvents, and in-kind solvents such as chlorinated solvents, a brominated solvent, and fluorinated solvents with various levels of acceptance. However, no single option seems well suited to replace HCFCs completely.

Recently unsaturated fluorochemical HFOs (hydrofluoroolefins) with zero ODP and HCFOs (hydrochlorofluoroolefins) with negligibly small ODP are said to be under development. They have ultra low GWP (<10) and are expected to replace high GWP-HFC and low or moderate GWP HFE solvents. Among them, HCFOs are unique in their balanced solvency due to the presence of chlorine and fluorine atom in the molecule. If HCFOs with appropriate boiling points, low toxicity and enough stability to the practical use be on market, they may replace HCFCs totally in the future.

1 Introduction

1.1 Terms of Reference

Decision XXIV/7 of the Twenty-fourth Meeting of the Parties requested the Technology and Economic Assessment Panel (TEAP) to prepare a draft report for consideration by the Open-ended Working Group at its 33rd meeting and this final report for the Twenty-fifth Meeting in 2013.

1.2 Scope and coverage

The text of Decision XXIV/7 is as follows:

1. To request the Technology and Economic Assessment Panel in consultations with experts from outside the Panel with the relevant expertise if necessary, to update information on alternatives and technologies in various sectors and prepare a draft report for consideration by the Open-ended Working Group at its thirty-third meeting and a final report to be submitted to the Twenty-Fifth Meeting of the Parties that would by end use:

(a) Describe all available alternatives to ozone-depleting substances that are commercially available, technically proven, environmentally-sound, taking into account their efficacy, health, safety and environmental characteristics, cost-effectiveness, and their use including in high ambient temperatures and high urban density cities;

(b) Update information provided by previous Panel reports on alternatives under development;

(c) Identify barriers and restrictions to the adoption and commercial use of certain environmentally-sound alternatives to ozone-depleting substances;

(d) Estimate, if possible, the approximate amount of alternatives with negative environmental impacts that could be or could have been avoided or eliminated by both non-Article 5 and Article 5 Parties in the process of phasing-out ozone-depleting substances;

(e) Identify the opportunities for the selection of environmentally-sound alternatives to HCFCs in the future;

2. To invite the Panel to take into account any information relevant for the report to be prepared under paragraph 1 of the present decision provided by Parties to the Secretariat.

1.3 Composition of the Task Force

The TEAP established a XXIV/7 Task Force to prepare this report to respond to Decision XXIV/7. The composition of the Task Force is as follows:

- Lambert Kuijpers (The Netherlands, co-chair TEAP, co-chair RTOC);
- Roberto Peixoto (Brazil, co-chair RTOC);
- Paul Ashford (UK, co-chair FTOC);
- Samir Arora (India, member FTOC)
- Dave Catchpole (UK, co-chair HTOC)
- Denis Clodic (France, member RTOC)
- Daniel Colbourne (UK, member RTOC)
- Mike Jeffs (UK, member FTOC)
- Ilhan Karaagac (Turkey, FTOC member)
- Osami Kataoka (Japan, outside expert)
- Michael Kauffeld(Germany, member RTOC)
- Tingxun Li (China, RTOC member)
- Keiichi Ohnishi (Japan, co-chair CTOC);
- Rajan Rajendran (USA, RTOC member)

- Enshan Sheng (China, member FTOC);
- Helen Walter Terrioni (USA, member FTOC)
- Samuel Yana-Motta (Peru, outside expert)
- Fred Wang (China, FTOC member)

The XXIV/7 Task Force has been co-chaired by Paul Ashford, Lambert Kuijpers and Roberto Peixoto.

A preliminary outline of this draft report was discussed by the TEAP during its meeting in Moscow, Russian Federation, 9-12 April 2013 and key challenges in responding to the Decision were highlighted, especially as they related to Clause 1(d). Co-chairs were also able to review the latest submissions from Parties, including those received immediately prior to the Moscow meeting, before assembling the draft materials already received from the Task Force members and continuing with the drafting activities. Subsequent chapter drafts were then circulated to relevant sub-groups of the Task Force before the final draft was circulated by email to the XXIV/7 Task Force as a whole and the TEAP for endorsement in early May. Although the timescale for wider TEAP review was short, it was recognised that this was a working document (draft report) for the consideration of the Parties at the Open Ended Working Group in June and that further opportunity for comments by TEAP and Parties would exist once additional direction had been received from Parties and duly considered by the Task Force.

At the OEWG in June 2013 in Bangkok, Parties agreed a deadline of 15 July 2013 for the submission of comments, additional information and relevant references. The Task Force received submissions from the EU and Japan (and from the Shecco company, whose references were supported by the EU). On the bases of all materials received and additional input from all Task Force members, a semi-final report was composed during 20 July - 20 August 2013, coordinated by the Task Force co-chairs (only via e-mail contacts and exchanges). This semi-final report was again reviewed by the full Task Force and by the TEAP during the last part of August 2013 and subsequently submitted as final TF report to UNEP’s Ozone Secretariat for publication on its website.

1.4 The Structure of the XXIV/7 report

The structure of the TEAP XXIV/7 Task Force Report is as follows:

Chapter 1, “Introduction”, presents the Terms of Reference, establishment of the Task Force and the consultative processes used to prepare this report.

Chapter 2, “Methodological Approach in Addressing the Decision” describes how the Task Force gave consideration to the request of the Parties, especially with respect to the quantification of negative environmental impact, and explains the decision to allow sectors covered within the report to address the requirements of Clause 1(d) from perspectives seen as most pertinent to their situations.

Chapter 3, “Dealing with what could have been avoided”, assesses the amounts that could have been avoided for some subsectors of refrigeration and air conditioning and for the foams sector, assuming conversions in a certain timeframe. It also seeks to derive some assessment of the impact of ‘missed opportunities’. It refers to chapter 8 for the amounts that could be avoided in the period to 2020.

Chapter 4, “Refrigeration and air-conditioning”, describes the commercially available and technically proven environmentally sound ODS alternatives in refrigeration and air conditioning. It also describes the barriers against uptake of alternatives. The sub-sectors considered are domestic, commercial, transport and large size refrigeration, unitary air conditioning and mobile air conditioning.

Chapter 5, “Foams”, describes the technical and economic experience gained with commercially available and emerging ODS alternatives. It also updates the timelines for the commercialisation of the emerging alternatives.

Chapter 6, “Fire protection”, describes the use of ODS alternatives in fire protection, and relevant issues pertaining to the Decision.

Chapter 7, “Solvents”, describes the ODS alternatives for solvents, as well as relevant issues pertaining to the Decision.

Chapter 8, as a response to Clause 1(d), seeks to describe the consequences of conversions on the ‘amounts that can be avoided’, including the lower impact from the different amounts that will be needed in servicing as a result of the conversion. In a first instance, this is done for a certain BAU case in refrigeration and air conditioning. It further elaborates on the potential incremental mitigation from future actions (‘the amounts that can be avoided’) in the foams sector.

2 Methodological approach in addressing the Decision

Clause 1(a) of Decision XXIV/7 requires the Task Force to describe all available alternatives that are *'commercially available, technically proven, environmentally sound, taking into account their efficacy, health, safety and environmental characteristics and their use including in high ambient temperatures and high urban density cities'*. The choice of language sets these terms as qualifiers for the alternatives to be included in this report. However, there is no suggestion that any quantitative threshold should be applied against each parameter, nor is there any suggestion that one parameter carries more importance than the others. Additionally, the inclusion of particular conditions such as environments with high ambient temperatures and high urban density creates scenarios in which otherwise technically and environmentally sound alternatives could be disqualified in those circumstances.

Those seeking to select appropriate alternative technologies, including experts on the Task Force seeking to write about them, apply an intuitive series of decision processes, linked to selection criteria, in order to reach an appropriate list of candidates as alternatives. Although the selection processes remain the same throughout, the criteria for selection may vary depending on the sector being addressed, and the outcomes, even within the same sector, may also be very different depending on the local conditions. It is therefore clear that ultimate alternative selection has to be completed on a case-by-case basis. The primary purpose of this section is to set out the way in which these selection criteria are developed and applied in this Report.

2.1 Commercial availability

Although this might seem a relatively simple criterion to establish for an ODS replacement, there are a number of factors that enter into any specific decision at installation level. These include:

- Currently installed manufacturing or refining capacity – both by quantity and location
- Current distribution channels within a specified locality
- Likely changes in supply/demand relationships over the life of the project
- For those alternatives under development, projected availability for project implementation

In this Report it is clear that the authors cannot and should not focus on specific project requirements. However, in order to maintain a project perspective, all of these variables are addressed in the sector-specific considerations covered in Chapters 4 to 7. It should be noted that efforts to project the commercialisation of alternatives that are currently 'under development' (as requested under Clause 1(b)) will always carry greater uncertainties than those for which commercial supply is already established. These uncertainties could be both in terms of available quantities and timing. Price could be a further uncertainty which, itself, may be impacted by the development of the supply/demand relationship.

2.2 Proof of technical feasibility

The Decision calls for alternatives under consideration to be 'technically proven'. This, again, is a seemingly simple concept, but carries with it a number of aspects that will ultimately need specific consideration at project level. These can include:

- Evidence of satisfactory use in similar or identical equipment
- Evidence of satisfactory use in a similar working environment
- Evidence that the system costs and efficiencies are sufficiently competitive to support economic viability (see also Cost Effectiveness)
- Confirmation that there are no regulatory impediments or standards approval deficiencies

These factors can combine to make some alternatives technically feasible on a broad (global) basis while technically infeasible in a specific set of circumstances or vice versa. Hence, it can be expected that some otherwise acceptable alternative technologies might not be technically feasible in areas, for example, of high ambient temperature.

In the Refrigeration and Air Conditioning sector, a specific assessment scheme has been developed, based on a NASA scale. This approach determines Technical Readiness Levels (TRLs) and these levels are defined in (US DOE, 2011). In general, this approach allows for the identification and tracking of alternatives from an earlier stage, but clearly enterprises still need to make their own decisions about the level which is needed to support investment.

2.3 Environmentally Sound Technologies

The definition of Environmentally Sound Technologies set out under the Agenda 21 Framework (and also adopted by the Global Development Research Centre) offers a list of criteria against which an alternative can be assessed. It states that:

Environmentally Sound Technologies (ESTs) encompass technologies that have the potential for significantly improved environmental performance relative to other technologies. Broadly speaking, these technologies:

- *Protect the environment*
- *Are less polluting*
- *Use resources in a sustainable manner*
- *Recycle more of their wastes and products*
- *Handle all residual wastes in a more environmentally acceptable way than the technologies for which they are substitutes*

It can be seen that this approach is one which provides a measure ‘relative to other technologies’, which, in turn, is more meaningful to the language of Decision XXIV/7, bearing in mind that all alternatives have some form of environmental footprint.

The challenge for the Task Force was to use this framework without seeking to create a hierarchy of environmental impacts. Although this was something discussed in the draft Report of the Task Force presented to OEWG-33, it was agreed with Parties that any such hierarchy would not be applicable on a broad basis. For example, in regions where water shortage is an issue, the use of this resource in implementing the technology could be of pivotal importance.

The Decision also calls for *efficacy, health and safety* to be taken into account within the scope of environmentally sound technologies. This brings matters such as flammability and toxicity to the fore. This, in turn, leads to a focus on the distinctions between hazard and risk. Clearly, whilst hazards may be posed by the use of flammable or toxic substances, the risks posed are measured after consideration of the potential for human or environmental exposure. The likelihood, duration and consequences of any such exposure are also factors to be considered. These factors will vary depending on matters such as the project location (where relevant). For example, in areas of high urban population density, the technology choices may be far more limited than for less populated areas because of the consequences exposure. The Task Force has sought to draw out these issues in its discussion of each alternative but recognizes that it cannot predict the range of local scenarios that might exist. The selection of the most appropriate alternative therefore remains a project-specific activity.

2.4 Cost effectiveness

There are two basic components of cost which are well understood by the Montreal Protocol – capital cost and operating cost. In simple terms, cost effectiveness would need to be defined in the context of whole life costing based on a certain required internal rate of return. The main problem is that this requirement will vary by geographic region, company size and the competing investment environment.

Equally, there is also a need to decide whether this is going to be assessed at alternative level (only applicable to drop-ins) or system level. In addition we have to consider where the cost will be borne.

At the level at which cost effectiveness is being determined, there is no real option but to make comparisons with the economics of previous conversions and decide whether there is a benchmark that can be drawn from the existing literature, outside of the rather narrow determinations made by the Multilateral Fund.

2.5 Negative Environmental Impacts

As with the term *Environmentally Sound Technologies*, it is important to notice that any reference to *Negative Environmental Impact* has to have a reference against which to compare, since all alternatives will have some form of environmental impact which, in cumulative terms, is likely to be negative, even if it is relatively negligible in isolation. The challenge of the Decision is that it seeks a quantification of those alternatives with Negative Environmental Impacts and thereby forces a clear definition of what constitutes 'negative'. The discussion on Environmentally Sound Technologies already recognises that seeking to create a hierarchy is complex and potentially controversial.

In discussion with Parties at OEWG-33 following the completion of the draft Report, it was agreed that the meaning of the term Negative Environmental Impact should be restricted to climate impact and that this, in turn, might simplify further to a consideration of global warming potential (GWP) where the energy impacts were unclear. There were other Parties that argued for a much more holistic view of climate impacts based on global temperature potentials (GTP), but the international acceptance of this approach and the absence of a mechanism by which impacts could realistically be quantified caused the Task Force to revert to its earlier approach whilst taking note to maintain a dialogue with the Science Assessment Panel on the emergence of this form of analysis. In this respect, it is understood that the GTP approach will be briefly addressed in Chapter 5 of the 2014 SAP Report.

With climate impact as the basis of reference, the Task Force has elected to adopt a methodology by which the alternative with lowest climate impact is identified as the hypothetical 'most favourable option' for an application (i.e. ignoring practical selection constraints) and the other alternatives are then compared against it. This comparison can be based on lifecycle assessment (LCA) or LCCP/TEWI methodologies. At its most basic, it may simply be an assessment of direct emissions of the alternatives themselves over the lifecycle, where these can be shown to contribute the bulk of the Negative Environmental Impact. The duration of a lifecycle may vary considerably between application sectors.

2.6 Quantifying avoided/avoidable impacts

The Decision requires the Task Force to quantify *'the approximate amount of alternatives with negative environmental impacts that could be or could have been avoided or eliminated by both non-Article 5 and Article 5 Parties in the process of phasing-out ozone-depleting substances'*. In the development of the draft Report for OEWG-33, this created a substantial discussion within the Task Force about how to assess 'what could have been avoided'.

What could have been avoided

The challenge of back-casting to quantify such impacts, is that the Task Force would need to understand the complete scenarios (technical feasibility, economic viability, health & safety and regulatory/standards issues) as they pertained at the time the decision on technology selection was taken. To do this in any other way would otherwise criticize previous decisions without consideration of the full facts pertaining at the time. This could clearly lead to undesirable outcomes and ones which could generate contentions that could be counter-productive to the future direction of the Montreal Protocol. The situation is even more complex for the RAC sector where not only new equipment needs to be considered, but also the servicing tail. In fact the impact of the servicing component from historic installations (HCFCs and HFCs) is likely to significantly exceed any impacts from accelerated hypothetical transitions in new equipment, making meaningful quantification of "quantities that could have been avoided" very difficult.

The Task Force therefore decided to take the alternative route of quantifying the environmental footprint of individual technology choices that were made and comparing them with the environmental footprint of the theoretical 'most favourable option', without speculating about 'what might have been' or 'what should have been'. In this way, the analysis stays within bounds that are objective and largely indisputable. Even then, the complexity for the RAC sector has made this approach particularly challenging and only a limited assessment could be made for some RAC subsectors. For the fire suppression and solvents sectors, the quantitative data simply do not exist historically to allow such assessments to be made.

For sectors which have been able to be assessed (most notably foams), the approach adopted by the Task Force has been to assess the 'negative environmental impacts' from 1990 onwards, since this was viewed as the first date by which the Montreal Protocol could be seen as having its own effects. The baseline in 1990 for most sectors would either be the use of CFCs or Halons. However, in the case of refrigeration and air conditioning, HCFC-22 has had a long history of use and, in many cases, was never a substitute for CFCs. HCFC-22 is therefore a legitimate part of the baseline in a large number of applications as of 1990.

One of the consequences of this reality is that delays in subsequent transition would be less impacting on ozone depletion than similar delays would have been in other sectors. Additionally, where alternatives to HCFC-22 were likely to involve similar or higher climate impact, a delay in transition might even be beneficial to the climate. A further diluting factor to consider in the case of those sectors involving significant consumption for maintenance purposes is that technology transition for new equipment would not impact the overall environmental footprint for the sector as abruptly as for those sectors without such a maintenance component (e.g. foams).

The approach finally adopted for the 'what could have been avoided' scenario was to assess the potential of the theoretical 'most favourable option' for climate and compare it with what actually happened. This ratio can be represented formulaically for each environmental impact as follows:

(*'Baseline'* minus *'Most Favourable Option'*) compared with (*'Baseline'* minus *'Actual Impact'*)

('potential') *('actual achieved')*

…where the Baseline is defined as the situation without the Montreal Protocol. If this relationship is provided as a percentage (i.e. 'actual achieved' as a percentage of 'potential') then it is a measure of how well the sector responded to the opportunity. However, it gives no indication about how significant in real terms that shortfall in achievement might have been to the ozone layer or the climate. This only emerges when the size of the sector is considered and the difference between the 'actual achieved' and the 'potential' are quantified for each environmental impact.

Finally, it should be noted that the outcome of this analysis is an expression of Negative Environmental Impact rather than an expression of ‘amounts of alternatives’ with Negative Environmental Impact, since this was viewed as a more meaningful metric when looking backwards. A summary of findings across all of the sectors covered in this Report is shown in Chapter 3. As noted earlier, the level of analysis depends largely on the historic data available. In some cases, in particular in foams and solvents, many of the alternatives are not-in-kind making the tracking of alternative selection particularly difficult and, in some cases, making quantification impossible.

What may be avoided in future

In addressing this part of the Decision, the Task Force has focused more significantly on the amount of alternatives with Negative Environmental Impacts (as determined by climate impact). This has been carried out by making an assessment of current consumption as at 2012 and analysing the impact of any projected transitions that are likely to take place in the period through to 2020. Where these transitions may involve alternatives with higher climate impact than the theoretical ‘most favourable option’, or where no transition away from an alternative with a Negative Environmental Impact is planned, the Task Force has sought to determine these quantities by sector and region.

Concerning forecasting, there is clearly a greater level of uncertainty about future choices, especially with respect to cost and, in particular, in respect of emerging technologies. Accordingly, for some sectors, a similar approach to the one for back-casting is considered for forecasting – i.e. to quantify the environmental footprint by alternative for specific technological options without making a judgment (whether initial or definitive) about future selection. The single alternative or group of alternatives with the lowest environmental footprint (‘most favourable option’) becomes the norm against which others are assessed. However, the assigning of the lowest environmental footprint does not automatically imply that this technological option is either technically feasible or economically viable. Indeed, since the Task Force understands that the purpose of Clause 1(d) is to limit consideration only to options that are technically feasible and economically viable, it makes sense to eliminate from the assessment those options that, for a given application, are already known not to be technically feasible or economically viable. The same might apply to other technology options where the barriers and restrictions are known to be insurmountable within the time-scale available for transition.

2.7 Low Global Warming Potential

There have been numerous discussions about the nomenclature that should characterise the level of global warming potential displayed by ODS alternatives. In some sectors, the available alternatives have all been seen to be below a GWP of 25, and these have been classed as ‘low-GWP’. In other sectors, the benchmark is a GWP of 1,500 or above and alternatives with GWPs at 1,000 or 300 can also be considered as ‘low’. In the refrigeration and air conditioning sector, the average GWP for an alternative to be considered as ‘low’ across the sub-sectors is approximately 750. The challenge is that the terms are used in a ‘relative’ rather than an ‘absolute’ way.

The Task Force has considered whether there should be a formal nomenclature applied across all sectors involving terms such as ‘moderate’ (<1,000), ‘low’ (<300) and ultra-low (<25), but this type of approach was seen as controversial when proposed in the response to Decision XXIII/9.

The definition of environmentally sound technologies adopted under Agenda 21 makes an important further point in its expanded version. It notes that *‘…environmentally sound technologies are not just “individual technologies” but total systems which include know-how, procedures, goods and services, equipment as well as organisational and managerial procedures’* The implication is that a systems approach is essential to truly identify what is environmentally sound.

The evaluation of ODS alternatives has embraced this concept through a number of methodologies such as TEWI, LCCP and wider Life Cycle Assessment (LCA). However, such analyses are inevitably specific to the applications against which they are applied and are difficult to extrapolate for wider policy purposes.

With these factors in mind, the Task Force has concluded that it is better to refer to holistic approaches such as TEWI, LCCP and LCA only qualitatively unless there is specific quantitative information on individual applications and scenarios. It also believes that adopting a formal nomenclature for classes of global warming potential is misleading, since it implies a hierarchy which is not always borne out when other factors are taking into consideration (e.g. energy efficiency). Therefore, references to climate impacts are mostly related to the overall impact of technologies where such information is available. In addition, where reference is made to ‘low-GWP’ solutions, the terminology should be treated as a generic label of improved climate performance rather than a prescribed band of GWP values.

3 Dealing with ‘what could have been avoided’

Section 2.6 of Chapter 2 has already addressed some of the challenges presented by Clause 1(d) of Decision XXIV/7 in respect of the ‘*approximate amounts of alternatives with negative environmental impacts that could be or could have been avoided*’. It has already been noted that any effort to quantify such amounts will be speculative and, when practised retrospectively (i.e. to determine *‘what could have been avoided’*), may unavoidably misrepresent the situation facing decision-makers at that point. In order to avoid this, the Task Force has sought to assess and present the magnitude of the issues in the context of the negative environmental impact of what actually happened when compared with the impact that would have occurred when considering a hypothetical ‘most favourable option’ from a climate perspective.

Even with such an approach, it has proved very difficult in some sectors to make this retrospective assessment. In sectors such as fire protection and solvents, the overall consumption data is simply not available for the market as a whole to put the substitution of ozone depleting substances into a quantitative historical perspective. This is particularly the case, because the applications are specialist in nature and technology selection is made on a case-by-case basis. This makes it meaningless to go back to review decisions made since 1990 on anything other than a case-by-case basis. Clearly, the work involved in doing this would be immense and the data is unlikely to exist in any other place than individual enterprise records. Even then, any effort to collate such data would depend on the reliable archiving of those enterprises and a willingness to share what may be perceived to be Confidential Business Information. For these reasons, neither Fire Protection nor Solvent uses are further covered in this Chapter.

In dealing with the refrigeration and air conditioning sector, the major challenge in quantifying *‘what could have been avoided’* is the need to have a complete inventory of the installed equipment, since decisions to transition out of ozone depleting substances can relate to either new equipment only, retrofit and subsequent servicing of existing equipment or a combination of both. Again, the challenge of completing such a retrospective analysis in a systematic fashion was assessed by the Task Force to be beyond reasonable expectations for a Report being delivered within one year of the Decision. The discussions with Parties at OEWG-33 had also indicated that the primary emphasis should be placed on what can still be avoided.

Despite these limitations, the Task Force members with expertise in the refrigeration and air conditioning sector have sought to provide a qualitative commentary on ‘what could have been avoided at a sub-sectoral level. In addition, where servicing has not been an issue (e.g. in domestic refrigeration), the Task Force has sought to present some semi-quantitative assessments based on some ‘what-if’ scenarios. These discussions are included in Section 3.1 below.

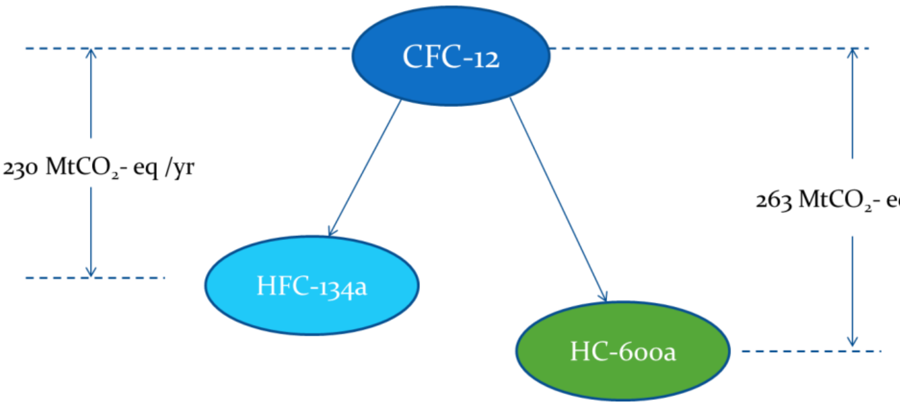
For the foam sector, the matter of a servicing requirement does not arise and therefore the analysis is rather easier to complete. It is also made possible by the fact that the Foams Technical Options Committee has sought to keep an historic assessment of consumption patterns, with periodic cross-checks between supply-side information (e.g. AFEAS data) and demand-side information collected from the global foam industry. Although, this data still remains a considerable approximation, it is sufficient to allow ‘*approximate amounts of alternatives with negative environmental impacts that […………..] could have been avoided*’ to be assessed. However, it was felt more meaningful to carry out this retrospective assessment in terms of cumulative global warming impact rather than the ‘amounts of alternatives’. The ‘amount of alternatives’ approach was therefore reserved for *‘what could be avoided in future’*.

3.1 ‘What could have been avoided’ - Refrigeration and air conditioning

As mentioned in Section 2.6, the most transparent approach for investigating “amounts avoided” would be to investigate the environmental impact of certain refrigerants or chemical choices, compared to a specific baseline. As can be seen in Section 3.2 for foams and its subsectors this is feasible. Consumption is then seen as potential emissions over the lifecycle. Domestic refrigeration has parallels with PUR appliance foam. In the case of domestic refrigeration a consumption could be assumed as baseline or as consumption profile over the period 1990-2020 using the original chemical (CFC-12), since consumption is rather straightforward and, as noted previously, the domestic refrigeration sector is not significantly impacted by servicing, maintenance and safety concerns, as is the case with some of the other sectors of refrigeration and air conditioning. Particularly considering a baseline for CFC-12 up to the year 2020 in domestic refrigerator applications makes the negative environmental impact decrease (or the smallest negative environmental impact) by the selection of the two available options very clear. It is obvious in this case that a large step is made by the conversion from CFC-12 to HFC-134a, both in ODP and in GWP (climate) terms. Use of the hydrocarbon option HC-600a reduces the negative environmental impact even further, but compared to the first step from CFCs to HFCs (when 85% of the reduction in tonnes CO_2 equivalent can be made), a further reduction (to hydrocarbons) can at maximum be another 15% of the baseline, as implied by the respective GWPs of the refrigerants.

Assuming a total global consumption of 330,000 tonnes over the period of 1990-2012 (where there are leakage percentages of a few percent per year, which are not considered relevant here), this would be equal to 3.40 Gt CO_2-eq. in the case of CFC-12. The use of HFC-134a (compared to CFC-12) would yield a decrease of the negative environmental impact by 2.94 Gt CO_2-eq.; the use of the low GWP alternative HC-600a would add the remaining 0.46 Gt CO_2-eq. to the decrease.

> *As a specific case for the period 2010-2013, while assuming a global consumption of 25,000 tonnes annually for this period, the use of HFC-134a (compared to CFC-12) would yield a lower negative environmental impact of 230 Mt CO_2-eq. per year; the use of HC-600a would add another 33 Mt CO_2-eq. annually. In practice, the entire global domestic refrigeration has been converted, with about 50% to HFC-134a, the rest to HC-600a. So the conversion of all now (2013) remaining HFC-134a to HC-600a would yield a saving of about 17 Mt CO_2-eq. annually.*



During the period 1990-2020 the Mobile Air Conditioning sector (MAC) started with full use of CFC-12 in new manufacture (and servicing). As of 1993, HFC-134a was phased in non-Article 5 and Article 5 countries, at a more rapid pace in non-Article 5 countries. The CFC-12 market in MAC had not yet reached maturity in Article 5 countries during the period 1990-1995, the amounts therefore remained relatively moderate. Where the market had matured (in non-Article 5 countries) the servicing amounts were two-thirds of the total demand annually.

Within the framework of this chapter, it is not assumed to investigate scenarios for a CFC-12 phase-out in new manufacture (and in servicing, via retrofits). However, since it concerns the conversion to the same type of chemical globally, as in the domestic refrigeration subsector, one could present numbers for amounts that could have been avoided, accepting a certain simplification of the servicing sector. In this way, one effectively assumes that other options were available throughout the entire period considered.

If the entire global MAC market would have been using one chemical, it would have been 1747 ktonnes during the period 1990-2012, for both new manufacture and servicing (Clodic, 2010). Potential emissions would then be 31.1 Gt CO_2-eq when applying CFC-12. By only using the HFC-134a alternative (in new manufacture and servicing) during the above period, the potential emissions would be 4.13 Gt CO_2-eq., or rather, 27 Gt CO_2-eq. could have been avoided over this period, being 87% of the total. Virtually all of the remaining potential emissions could have been avoided by the use of low GWP alternatives (being low GWP HFCs or CO_2 in the case of MACs).

It would be desirable if one could make a similar exercise for other sectors in refrigeration and air conditioning. This could be possible, in principle, by assuming a baseline of HCFCs starting in the 20th century (1990) and going to 2020-2030 following a BAU trend. Other cases would be the consideration of only R-404A or R-410A starting in the 20th century (i.e., hypothetically in 1990) and simply proceeding into the future following the BAU scenario, or mixtures of HFC-32 with low GWP HFCs, other blends or simply hydrocarbons (HC-290 or HC-1270).

Whereas this kind of consideration gives insight in the case of domestic refrigeration and similar other uses that do not have to deal with complicated servicing issues etc., the question in the case of many other RAC sectors where refrigerant handling and large charge sizes of refrigerant are involved, is whether a consideration of a sole replacement with, e.g., R-410A or a sole replacement with, e.g. hydrocarbon in making selections early has any value for common practice.

Two issues are important here:

- the fact that one would assume low GWP options (or others) to start at a very early phase, would also imply that regulatory decisions and costs considerations how to deal with flammability issues, would have been resolved in all sub-sectors of RAC, which could have led to a completely different reality in a given year, far from the usual discussion on conversions and retrofits to reduce the need for common refrigerants (such as HCFCs, and also HFCs at present).
- the fact that a change from a refrigerant such as HCFC-22 to a certain other refrigerant or blends of refrigerants in new manufacture would occur in a given year, does not mean that the new refrigerant would make much contribution to the overall negative environmental impact. For 10-15 years, the servicing needs for the "old" refrigerant (which are in the order of 40-80% in the total in an equilibrium scenario, dependent on the servicing percentage) will play a substantive role in the total negative environmental impact, before that the change to new refrigerants would become clearly visible. This of course will depend on the economic growth (the growth in the numbers of equipment), the percentage of (the new) refrigerant that will be taken up in manufacture, and the lifetime of the average equipment.

As an example, assuming that a certain group of countries is completely dependent on a certain chemical (i.e., HCFC-22), with 80% of the total consumption of say, 1,000,000 tonnes per year, used for servicing, it means that 200,000 tonnes per year would be used in new manufacture. A change of 100% in a given year to a certain refrigerant or blend with a negligible GWP means that one would avoid 200,000 tonnes of HCFCs in that year, and servicing amounts of HCFC-22 for the equipment that has not been manufactured in that year during future years, i.e., for a 15 years lifetime of the equipment it would be something like 2,400,000 tonnes over a period of 15 years, due to a conversion of 200,000 tonnes in one first year.

In fact, this is already a first estimate of amounts that could be avoided in the RAC case where it concerns both new manufacture and servicing. In order to make further, more precise calculations for amounts that can be avoided in future, this would quickly lead to the introduction of scenarios, given the complicated nature of replacements in the main subsectors of the RAC sector. This is not assumed to be the basis for considerations in this chapter. The calculation of the amounts that can be avoided in future in the RAC sector are therefore all presented in chapter 8.

3.2 'What could have been avoided' – Foams

The foams sector has made transitions from its CFC baseline, through HCFCs in some cases, to either high-GWP or low-GWP non-ozone depleting solutions. As of 2013, the residual reliance on HCFC use in Article 5 regions rests to some extent in polyurethane appliance foams, but mostly in PU Spray and XPS Board.

It is important to note that, of the 5.6 million ODP tonne baseline footprint of the foam sector between 1990 and 2012, over 80% of the footprint was avoided. Similarly, for a cumulative baseline climate footprint of 26.3 billion tonnes CO_2-eq over 66% has been avoided. This assessment has taken the rather stringent approach of not correcting for the 10 year grace period given to Article 5 Parties, so the avoided baseline percentages against regulatory requirements are considerably higher. A similarly stringent approach has been taken with respect to the availability of non-ozone depleting alternatives and low-GWP solutions. It has effectively been assumed that these were available throughout the period of analysis and thereby over-estimates the 'missed opportunities' in order to place a worst case perspective to the data generated and avoid subjective scenarios. The following graphs in Figure 3-1 illustrate the missed opportunities analysed in this way for both ozone and climate:

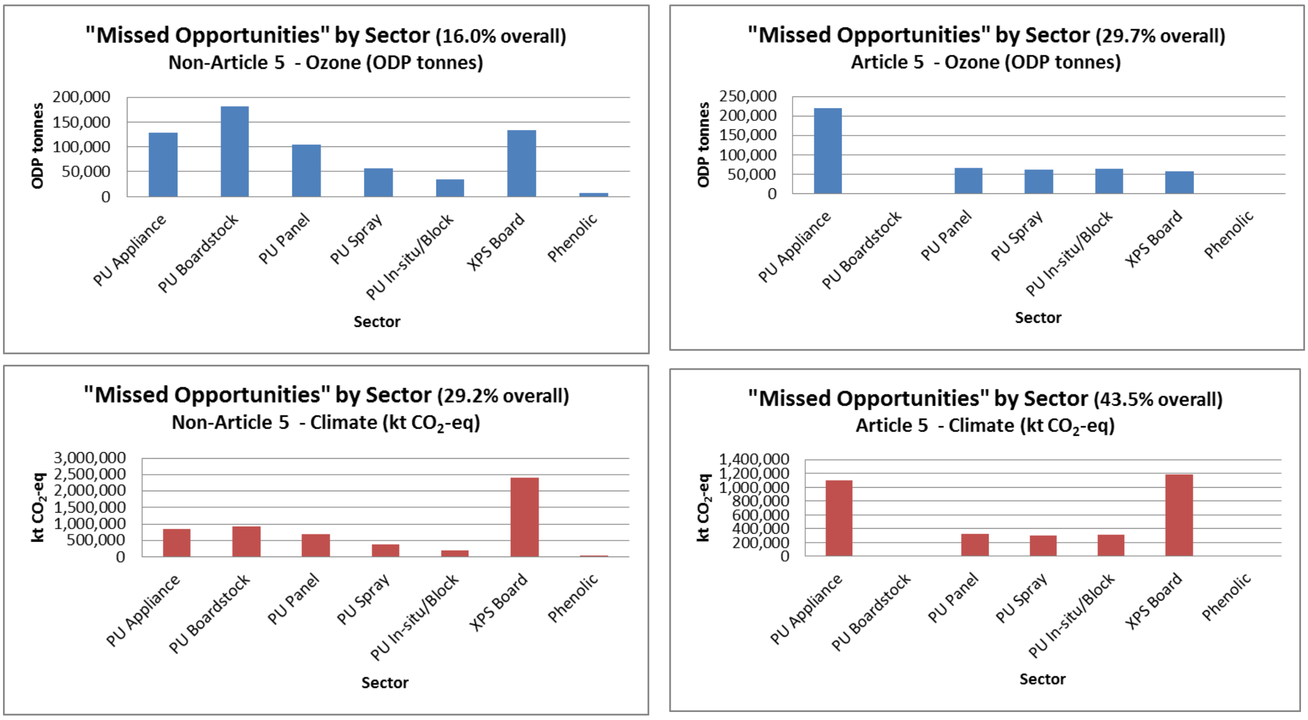


Figure 3-1: Missed opportunities for the avoidance of blowing agents with negative environmental impacts when compared with the 'most favourable option' determined in both ozone and climate terms

The reasons for these 'missed opportunities', especially for the XPS board sector, are more fully explained in the following sub-sections of this Chapter. However, it remains difficult to identify significant areas where the transition process could have been accelerated substantially given the constraints faced. It should also be noted that the effect of changes in thermal performance have not been factored into the climate assessment in view of the complex and non-determinable usage patterns to which most building insulation foams are subject.

Polyurethane appliances

The adoption of polyurethane foams within the appliance sector took place substantially in the late 1960s and 1970s as concerns began to rise about energy use in the wake of the oil crises of the period. An additional advantage was identified, in that polyurethane foams also contributed to the physical strength of refrigeration cabinets and allowed for a reduction in the steel structures used and, as a consequence, the weight of the cabinets themselves. This has ultimately been beneficial for both the economics and the environmental footprint of the industry.

Although there have been regional differences in the design of refrigerators and freezers over the last 40 years, the ability to transport units over long distances has resulted in a gradual levelling of the global refrigerator market over time. Nevertheless, there continues to be a substantial range of units on offer, from the large 'American style' cabinets to the smaller compact European and Chinese models.

At the time of the transition out of CFCs in the early-to-mid 1990s, the design differences were truly on a regional basis. Indeed, the 'American style' refrigerator used throughout North America created transitional challenges that were not seen in either Europe or Japan. These challenges were largely down to the manufacturing processes and product designs in operation at that time. Effectively, the adoption of hydrocarbons as a direct alternative for CFCs was not seen as an option for two major reasons:

- The inappropriateness of the existing manufacturing facilities to accommodate the use of hydrocarbons for such large cabinets
- The poorer thermal performance of hydrocarbon blown foam when compared with CFC-containing foam and HCFC-containing foam, which was seen as the other obvious replacement at that time

Despite some initial issues with the interaction between HCFC-141b and the refrigerator liners, HCFCs became the accepted alternative for CFC-11 in North America in contrast to the rest of the developed world, where the adoption of hydrocarbon was widespread. It is estimated that this approach led to additional ozone-related consumption of approximately 13,500 ODP tonnes in the period from 1995-2002 (~72% of the developed country total for appliances in that period). However, it should be noted that this total was only equivalent to around 9 months of non-Article 5 Party consumption in 1990. This observation brings into sharp relief the situation at the time, which was that delays in implementation would be more costly to the ozone layer than the precise choice of ODS alternative. This was a time when HCFCs were seen by most as *'part of the solution rather than part of the problem'*. The combined impact of the delay in converting out of CFCs in the post-1990 period and the choice of HCFCs in North America is seen in the non-Article 5/ODS graph in Figure 3.1 (and also represented again in Figure 3-2) amounting to approximately 125,000 ODP tonnes in all. Since 2003, the use of HCFCs in domestic appliances has largely been eliminated in non-Article 5 countries, meaning that the subsequent periods have broadly maximised their potential for avoiding further ozone depletion.

For Article 5 Parties, the CFC phase-out date was set 10 years later than for non-Article 5 Parties. However, in those Article 5 Parties, the use of domestic refrigerators and freezers was less widespread in the period between 1990 and 2000. Accordingly, the impact of deferred phase-out date was less severe than it would have been had it been applied in non-Article 5 Parties. Nevertheless, the overall implication in the 1990-2000 period was 188,000 ODP tonnes but reducing in the subsequent decade to 27,500 ODP tonnes indicating the efforts applied in Article 5 Parties, with the support of the Multilateral Fund to ensure that CFC transitions in the appliance sector were achieved well ahead of the final 2010 phase-out deadline. The 'Ozone-A5'bar in Figure 3-2 illustrates the extent to which the appliance sector in Article 5 Parties has limited its impact on the ozone layer, not only through its preference for early transition, but also through the avoidance of HCFCs in a number of key markets.

It should be noted that Article 5 Party strategies for CFC phase-out have not been uniform from region to region. China and other parts of Asia have focused primarily on transitioning from CFCs directly to hydrocarbons, whereas much of the domestic appliance sector in Latin America took a different route, with a focus on HCFC-141b as an alternative for its CFC phase-out. This was driven in part by the growing importance of the North American market for its exports.

With respect to climate impacts, the initial choice taken in North America has continued to impact subsequent choices when phasing out HCFC-141b use, with saturated HFCs being preferred to hydrocarbons. Again, the main reason cited was the superior thermal efficiency of the fluorinated substitutes. Non-Article 5/Climate graph in Figure 3.1 and the ‘Climate – non-A5’ bar in Figure 3-2 illustrate the significance of these subsequent choices on the overall climate impacts for the period from 2000-2010 and those projected for the following decade.

The overall impact of not choosing low-GWP alternatives in the period from 2000-2012 is currently estimated to be around 225,000 ktCO_2-eq. Of course, this simple analysis fails to account specifically for the potential energy benefits from using fluorinated substitutes such as saturated HFCs and this matter will be picked up again in Chapter 5.

For Article 5 Parties, the retained use of CFCs in the period to around 2005 dominates the assessment of climate impact because of the high global warming potential associated with CFC-11. However, the large-scale switch directly to hydrocarbons showed considerable benefits for the on-going climate impact of the appliance sector. The graph shown as Figure 3-2 below summarises the potential versus actual avoided consumption for the sector between 1990 and 2012.

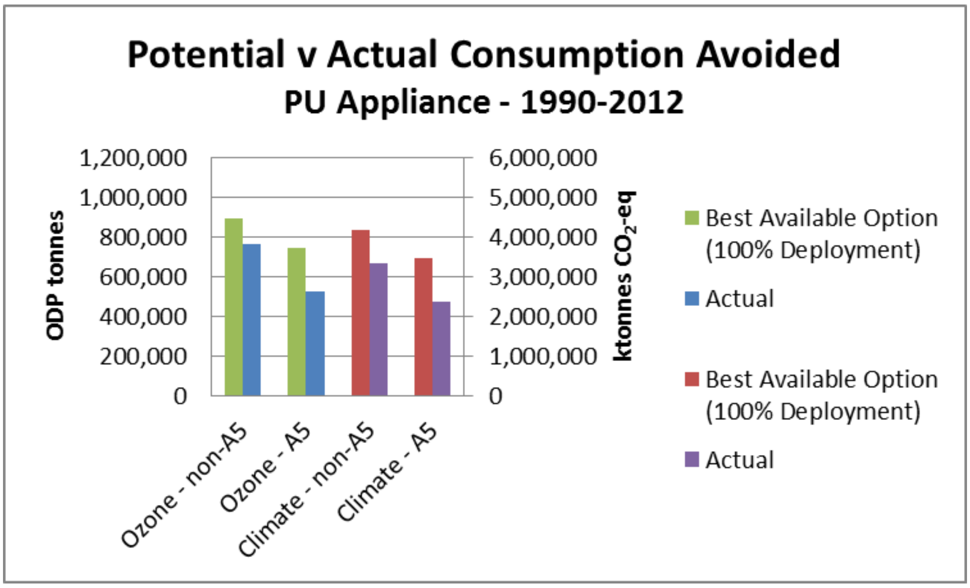


Figure 3-2: Assessment of actual avoided consumption versus potential – PU appliance

Polyurethane - boardstock

The adoption of polyurethane boardstock (also known as flexibly-faced continuous laminate) has varied substantially across the range of non-Article 5 Parties because of substantial differences in building practices. In North America, the widespread use of timber-frame construction techniques has led to the use of boardstock as a siding material. Similar trends have occurred in Japan where metal-framed construction systems are also quite prevalent. In Europe, however, where brick and block cavity construction has been more typical for residential buildings, the bulk of the early uptake of polyurethane boardstock was in the non-domestic sector, particularly in offices, warehouses and industrial buildings. These non-domestic applications have also been evident in Japan and North

America as well, but have been less conspicuous in view of the residential demand. In more recent times, the European residential buildings have also embraced polyurethane boardstock, since increasing insulation requirements have meant that wall cavities have not been able to accommodate the thicknesses required of less efficient insulation types.

CFC-11 was the predominant blowing agent throughout the early development of the polyurethane boardstock market. In the early stages of the search for a replacement blowing agent, HCFC-123 had emerged as an option, but was subsequently ruled out on the basis of unfavourable toxicity. This led to a broad consideration of HCFC-141b, especially in North America. However, after substantial consideration of the flammability implications and reformulation to include flame retardants in some products, it was decided that, to a large extent, it would be possible to leapfrog HCFCs and move directly to hydrocarbons – typically pentanes. In order to limit the loss of thermal performance resulting from this transition, cyclo-pentane was often favoured in the blends chosen – so much so that there was concern for a while about the availability of sufficient supplies. As foam formulations have been optimised, some of the blends have been able to switch towards n-pentane. However, choices continue to vary.

From a climate perspective, the continuing use of CFC-11 in the period from 1990-2000 had a detrimental effect in excess of 900 million tonnes CO_2-eq in view of its high global warming potential compared with the alternatives. This is illustrated in Figure 3-3 below.

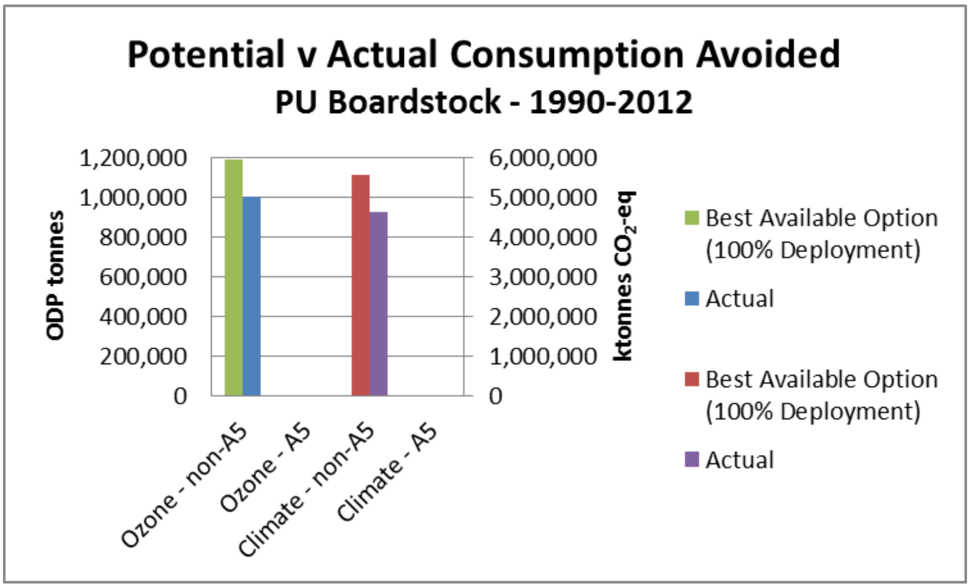


Figure 3-3: Assessment of actual avoided consumption versus potential – PU boardstock

However, it could be argued that this impact was somewhat offset in the next decade by the avoidance of widespread HCFC-141b use. Once again, the balance between the speed of transition and the relative efficacy of the alternatives is an obvious discussion point.

The first comment to make with respect to the manufacture and use of PU boardstock in Article 5 Parties is that it is relatively minor when compared to non-Article 5 activity. Back in the 1990s the total consumption of blowing agent was less than 1% of that in developed regions. Those few manufacturers in Article 5 Parties understandably waited for a technology lead from the larger producers and this resulted in a relatively measured transition between 2001-2010. Again, with the major alternative being hydrocarbons, the impact on consumption of ODS after 2010 has been minimal.

The impact on climate from the slow transition out of CFCs was no more than 6.3 million tonnes CO_2-eq. The growth of the sector since 2005, especially in places like China, has been achieved through the adoption of hydrocarbon technologies from the outset and therefore there has been little overall 'missed opportunity' since then.

Polyurethane – panel

Back in the 1990s, the panel market was split between emerging building cladding applications such as those described above and the commercial refrigeration market (both mobile and stationary) where polyurethane-cored panels have been used for both walk-in cold rooms and refrigerated transport applications. A substantial portion of the market was served by discontinuous manufacturing equipment at that time. However, continuous manufacture has grown to dominate the sector as the greater demand in the building sector created consistency of demand and economies of scale.

As was the case with other insulation foams, CFC-11 was the blowing agent of choice in the period through to 1990. Since much of the manufacturing equipment at that stage was discontinuous there was a considerable reluctance to experiment with hydrocarbons and the natural replacement was HCFC-141b. Initial transitions took place alongside those in other foam sectors in the period between 1994 and 1996. However, as capacity began to increase for continuously produced panel, it became possible to design plants to accommodate hydrocarbon while minimising the impact on investment cost. The thermal performance disadvantages of hydrocarbon at the time were of less importance in the panel sector than in the PU boardstock sector. This reflects the fact that the thickness of panels is generally driven by the requirements on them for structural integrity over long spans rather than by the thermal performance itself.

The impact of these trends is shown in Figure 3-4 below, where the initial transition decision-making process caused some lost time and arguably missed opportunities accounting for approximately 100,000 ODP tonnes of additional ODS consumption in the period from 1990-2012. However, despite the selection of a number of HCFC transitions, they became less significant in the latter decade of this period as the continuous panel industry grew based, as it is, on hydrocarbon (typically pentanes). The climate consequences of these transitions in non-Article 5 Parties are shown in Figure 3-4 and are a little more clear-cut, with the delayed move from CFC-11 being the critical influence.

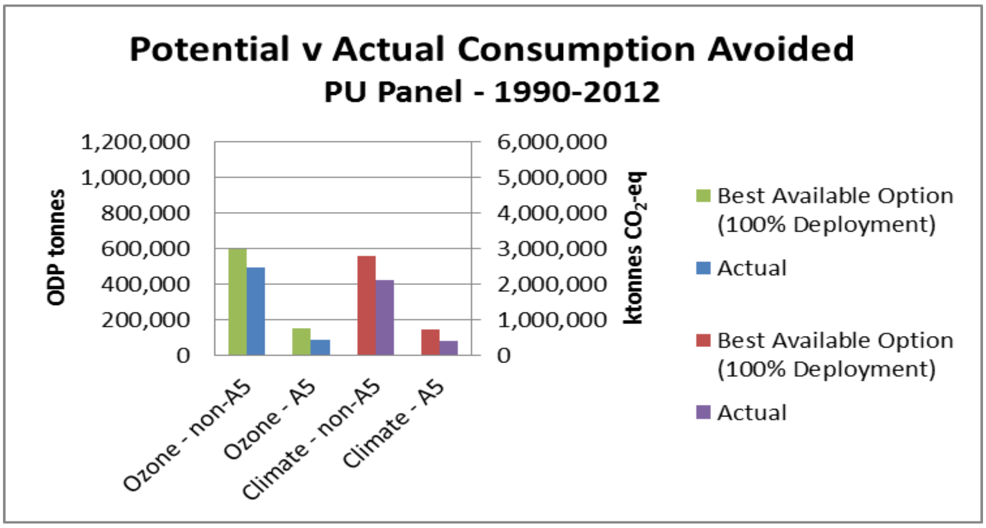


Figure 3-4: Assessment of actual avoided consumption versus potential – PU panel

The Task Force's analysis suggests that the impact of the HCFC and HFC technology selections in the discontinuous panel sector may have resulted in an additional climate burden of over 700 million tonnes CO_2-eq. in the period from 1990-2012.

In Article 5 Parties, except those supplying markets in adjacent non-Article 5 Parties, the economies of scale have historically been too low to support continuous panel production. This is changing as the larger economies amongst the Article 5 Parties grow strongly, but the account still holds true for the bulk of developing countries. With a substantial base of discontinuous plants, the tendency was to retain the use of CFCs for the bulk of the ten year available grace period in order to take advantage of the technology developments occurring in parallel small and medium enterprises in non-Article 5 Parties. Indeed, the use of HCFC-141b in a number of Article 5 Parties was still continuing in 2012 and is projected to continue at a lower level beyond 2020.

For climate, the missed opportunity has been slightly less severe at 322 million CO_2-eq because of the smaller relative size of the market currently in developing regions.

Polyurethane – spray

Polyurethane spray foam differs from a number of other products in that it is manufactured (applied) on site. In this respect, the system needs to be more robust and resilient than most factory controlled foam processes. For example, the process needs to cope with a wide variety of ambient temperatures.

Once again, CFC-11 was the original blowing agent of choice in the pre-1990 period. At the time of the first transition, the three major spray foam markets were North America, Spain and Japan. In the early stages of the transition there was considerable optimism in North America that hydrocarbons (particularly cyclo-pentane) could be used successfully as a replacement for CFCs. However, a series of incidents when spraying in confined areas confirmed that the management of the process was too sensitive to be deployed on a commercial basis, despite the best efforts of Exxon and others to provide appropriate guidance. The net outcome was that the industry defaulted to HCFC-141b and the impact of 50,000-60,000 ODP tonnes in the period from 1990-2012 is shown in Figure 3-5. However, because spray is a fairly emissive process, the transition was prioritised by the industry and much of the benefit from early transition was gained. Otherwise, the impact would have been considerably larger.

The absence of a good low-GWP alternative has meant that the industry around the world has struggled with the global warming impact of substitutes. One of the major HCFC substitutes were saturated HFCs (HFC-245fa in North America and HFC 365mfc/227ea in parts of Europe). In Japan, there was some hope that super-critical CO_2 would signal the way forward but this has remained rather a niche technology. CO_2(water) blown foams have also been adopted in some areas but the quality of foams has been variable, especially from a thermal perspective. Such foams have, however, found widespread use as low density, gap filling foams to counter air infiltration in residential buildings. These foams tend to be completely open celled and do not offer particular value in other applications. The lack of a good low-GWP solution in the period to 2012 is illustrated in Figure 3-5 by the fact that the actual avoided impacts are considerably lower than would be associated with a true low-GWP solution.

Although the size of the PU spray foam market in Article 5 Parties was relatively small in 1990, there has been substantial growth in the sector since then, driven by the need to retrofit existing building stock for energy efficiency reasons. As much of this growth has been based on HCFC-141b systems, both the ozone and climate gains have been sub-optimal. Again, this is illustrated in Figure 3-5 below.

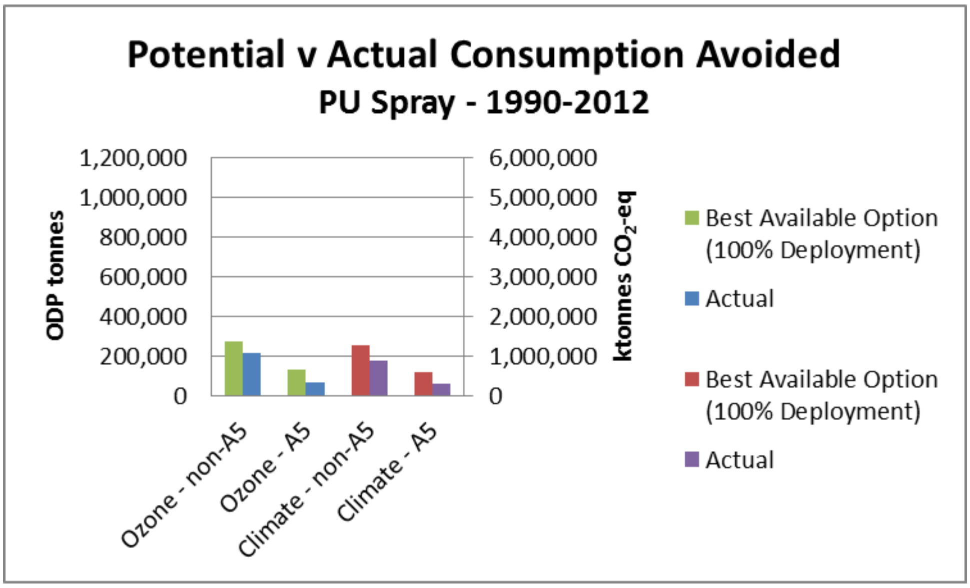


Figure 3-5: Assessment of actual avoided consumption versus potential – PU spray

Polyurethane – in-situ/block

Once again, the traditional blowing agent for these applications was CFC-11. It offered the versatility and the tolerance to be able to deal with the wide range of applications described. Accordingly, the natural replacement for CFC-11 was HCFC-141b, which was the closest to a drop-in solution available at that time. However, even in the 1990-2000 period, there were a few block applications which were able to switch directly to hydrocarbons. Another application which moved to hydrocarbons directly was pipe-in-pipe which is broadly an in-situ process used for district heating pipe manufacture. These pipes had been particularly widely used in the centralised economies of the former Soviet Union, but have been more recently growing as a result of the growth in micro-generation (small-scale CHP).

For non-Article 5 Parties the switch from ozone depleting substances was generally smooth and by 2005 most technologies were based on ODS substitutes. However, when the climate impact is considered, it is clear that one of the significant transitions was to relatively high-GWP substitutes, resulting in some missed climate opportunities which persist to the present day. The estimate of these is approximately 200 million tonnes CO_2-eq across the non-Article 5 regions, as shown in Figure 3-6.

For block and in-situ foams in Article 5 regions the application areas are once again varied, but also cover applications not widely seen in non-Article 5 regions. These include such items as thermoware, which are designed for keep food insulated from the ambient conditions. The phase-out of CFC-11 in these enterprises was relatively slow and that the use of HCFC-141b remains fairly widespread and is likely to do so until at least 2020 (see Chapter 8). This reflects the reality that this sector is heavily populated with small and micro enterprises, making the economies of scale unattractive for conversion. These enterprises have often been captured as umbrella projects and centre round the systems houses that serve them.

Unsurprisingly, the ability to avoid high-GWP solutions has also been lacking in a number of these operations. It is estimated that around 315 million tonnes CO_2-eq has been missed as a result of the absence of a cost-effective low-GWP solution. As will be seen in the relevant section of Chapter 5, the technical alternatives do exist, but the deployment of those technologies remains a challenge.

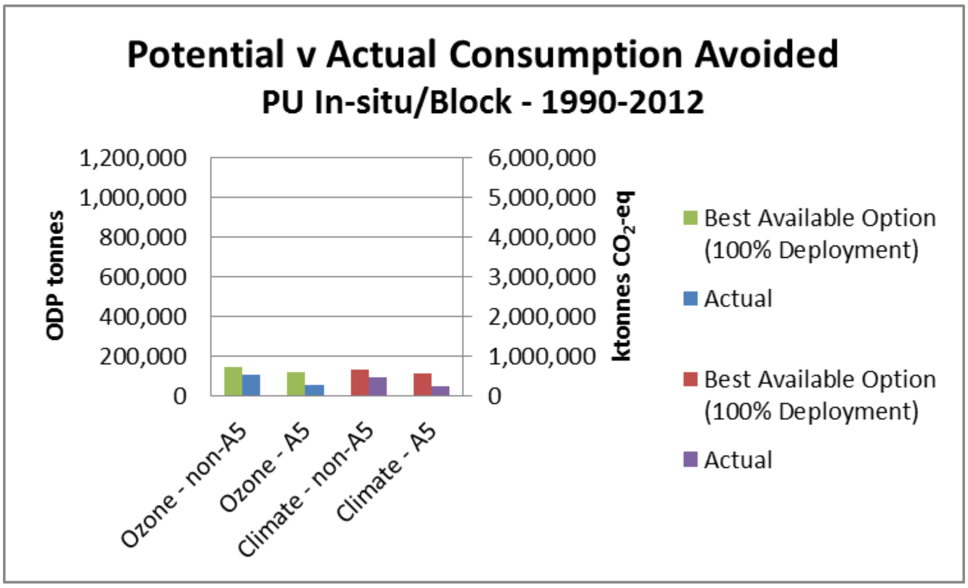


Figure 3-6: Assessment of actual avoided consumption versus potential – PU In-situ/block

Polyurethane – integral skin

As with many of the other foam sectors, PU Integral Skin foams relied on CFC-11 as their blowing agent in the pre-1990 period. With thermal performance not being a primary requirement, the blowing agent was chosen more for its ability to process well and to be used safely. Hence boiling points and flammability limits were key. When the CFC-phase-out was mooted in the sector, the natural transition was to HCFC-141b, even though there was some concern initially about its potential for limited flammability. One other characteristic to consider is the fact that most of the blowing agent is lost from these products within the first two years. Hence any environmental impacts are magnified by their rapid pathways to the surroundings. Other options used in the sector have been HCFC-22 and or HCFC-22/142b blends.

The Foams Technical Options Committee has not routinely monitored consumption in this sector of use, since one of the initial purposes of tracking consumption was to estimate long-term banks in products. However, as the focus moved to quantifying emissions, there have been some one-off assessments for the purposes of reports like this. Nevertheless, there is no set of base data available at this time which allows the assessment of missed opportunities and future potential avoidance. The Foams TOC is considering an attempt to fill this data gap in time for its 2014 Assessment Report although source data such as the AFEAS data collection reports have collected information at relatively high level – e.g. closed cell and open cell. It seems likely that rigid and flexible integral skin may have been categorised differently within this data set making it difficult to isolate the tonnages of blowing agent allocated to each type. This serves to illustrate that product definition remains a challenge in this sector.

Of the estimates that do exist, the energy-absorbing automotive market has been believed to consume around 50,000 tonnes of PU per year. However, formulations in the sector use typically less than 5% by weight of blowing agent making the annual consumption of blowing agent relatively modest at 1,500-2,500 tonnes per annum. Although there are a large number of other Integral Skin Foam applications to consider, it is estimated that no more than 10,000 tonnes goes to this sector annually, making its significance relatively modest.

Concern over flammability has limited the use of hydrocarbons in this application, but it is known that some manufacturers have adopted the technology. Other options adopted following the phase-out of HCFCs have included HFC-134a and HFC-245fa. These might be considered as detrimental choices from a climate perspective but produce high quality products, especially in the shoe sole application. The other technology option that has been the focus of much attention has been CO_2(water). However, early experiences with this technology were dominated by poor skin quality. The use of in-mould coatings was trialled but the economics of this approach were understandably less favourable. Several major systems houses have worked further on this technology since and acceptable commercial systems are no available. Section 5.7 of this report looks at the current, commercially available options.

XPS board

The blowing agent of choice for XPS manufacturers in the pre-1990 period was CFC-12. Although this was allocated the same ozone depletion potential as CFC-11, the global warming potential was significantly higher, being well in excess of 10,000 when assessed over a 100 year time horizon. Combined with the relatively significant losses of blowing agent during the processing of XPS, this made the product the focus of close attention from the introduction of the Montreal Protocol in 1987. It also put a priority on the early identification of alternatives.

Initial work in the global XPS industry focused on the switch to HCFCs and, in particular, combinations of HCFC-22 and HCFC-142b. HCFC-22 was already established as a readily-available, well-studied alternative based on its widespread use as a refrigerant. However, the drawback was that HCFC-22 was more soluble in polystyrene than CFC-12 and would defuse from foam cells more easily. The purpose of using HCFC-142b was therefore to ensure that sufficient blowing agent remained in the product over the lifecycle of the product to deliver reliable thermal performance. Since HCFC-142b was typically more expensive than HCFC-22, the ratio of the blends used tended to reflect the priority that was being placed on long-term thermal performance.

The limited missed opportunity from an ozone perspective, as shown in Figure 3-1, and again in Figure 3-7, is testimony to the rapid transition from CFC-12 that was managed by the industry in the decade from 1990 to 2000. However, the transition from HCFCs proved to be considerably more challenging and has therefore offset the benefits of early transition from CFCs to some extent.

The major point to emerge in the period of HCFC phase-out was just how varied the markets for XPS were in different regions of the world. The North American market was primarily in sheathing products for the timber-framed residential market. This is a highly cost-sensitive market with large surface areas of relatively thin board being applied. This contrasted significantly with the European market where products were primarily for the commercial building market, requiring thicker profiles with higher added value. In Japan, the market was something of a hybrid of these two extremes, but was also governed by fire codes that would permit the use of hydrocarbon blowing agents in products for some applications. This opened up an alternative which was not likely to be available for either Europe or North America.

The global warming potential of CFC-12 in the 1990-2000 period has dominated the impact, even though it was in use for a relatively short time. However, with HCFC-22 and HCFC-142b themselves having global warming potentials above 1500, the climate impact remained significant. The impact was also more long-lasting than it might have been because of the differences in regional approach being proposed and the difficulties that this created for the multi-national producers. For example, in Germany (by far the largest market for polystyrene insulation in Europe), there was substantial pressure on an early phase-out of HCFCs. This led to the development of CO_2 blown technology (in several variants) for the more tolerant European product range. Even then, the technology could not make all grades of product, involved substantial capital cost and also was governed by a substantial base of patents. This was not unreasonable based on the research and development investments that had been made.

The emergence of such technologies did not help solve the transition challenge in North America because the product portfolio was totally different and the costs the industry could absorb were also more limited. This left the North American industry looking primarily at variants of gaseous HFC solutions including HFC-134a and HFC-134a/152a blends. Within the blend approach, HFC-134a was seen to fulfil the former role of HCFC-142b, while HFC-152a would be more emissive, in similar fashion to HCFC-22. Although there would be more emission in the short term from HFC-152a, this was compensated for by the relatively low GWP of HFC-152a (~ 150). The emission rates did, however, raise other issues, such as the impact of local VOC regulations. The net result of these uncertainties was that transition out of HCFC-142b and HCFC-22 did not occur in North America until 2009/10, with the alternatives not having a substantially better climate profile than the HCFCs they replaced.

The overall lost opportunity arising from these transitional challenges is in the order of 2.4 billion tonnes making it far and away the most significant individual sector in its contribution to the 'missed opportunity' discussion. However, the converse argument is that its prompt action over CFC-12 was one of the greatest contributors to early gains for the Montreal Protocol.

The development of XPS markets in Article 5 countries has been more difficult to track, but it is understood that close to exponential growth has occurred in the period from 1990 to date and this is expected to continue through until 2020 (see also Chapter 8). One of the main engines of this growth has been China, where the focus on building energy efficiency, coupled with the relatively low investment levels for small extruders has created a network of regional and sub-regional producers.

As much of this growth has taken place since 2005, the plants installed have tended to bypass CFCs and are largely based on HCFC-142b and HCFC-22. However, as a result of cost and availability, HCFC-22 has understandably been the dominant component of most blends.
The implication of previous decisions may have led to a missed opportunity in this sector of approximately 1.18 billion tonnes of CO_2-eq in Article 5 Parties, although it may be harsh to convey the situation in these terms bearing in mind the uncertainties about substitutes that continue to exist.

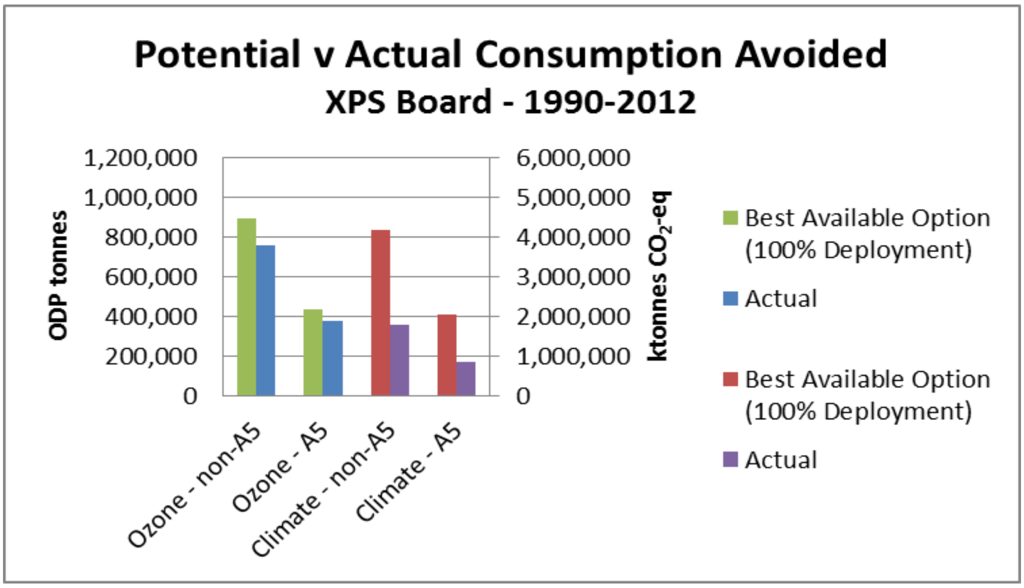


Figure 3-7 Assessment of actual avoided consumption versus potential – XPS board

Phenolic foam

Apart from the occasional phenolic block foam plant, the vast majority of installed phenolic foam capacity was in non-Article 5 regions in the pre-1990 period. As with other technologies, CFC-11 was the predominant blowing agent as phenolic foam technologies became established during the mid/late 1980s. In line with other technologies, the phenolic foam industry was able to manage a CFC transition to HCFC-141b in the mid-1990s. However, there was more concern at that stage about moving directly to hydrocarbons (as the bulk of the PU boardstock industry had done) for fear of compromising the intrinsic fire properties. Nevertheless, when the subject was re-visited in the late 1990s ahead of the pending HCFC phase-out, it was found that the fears were unsubstantiated and the fire properties held up, even with hydrocarbon blowing agents inside. However, hydrocarbon was not possible for discontinuous block foam plants because of process risks and saturated HFCs (typically HFC-365mfc/227ea) were adopted instead.

In one specific phenolic boardstock technology, 2-chloropropane had been used as an alternative to CFC-11from the outset. Although the blowing agent is chlorinated, it has such a short atmospheric lifetime that it has never been a candidate for inclusion under the Montreal Protocol – along with a number of other short-lived compounds. Interestingly, 2-chloropropane could therefore have been used as an alternative to HCFC-141b in the earlier transitions, but this was never widely trialled – possibly because of patent constraints at the time.

The impact of relatively trouble-free and timely transitions across the industry has been relatively minimal. The delay in the implementation of non-ODS substitutes will have resulted in some contribution to the 7,500 ODP tonne ‘missed opportunity’, but the proportion will have been small.

Climate impacts in non-Article 5 countries shows a similar, and relatively non-controversial, transitional impact. However, the persisting shortfall against the ‘best available option’ is indicative of the continuing use of saturated HFCs in the phenolic block foam sector. Since most of this product is destined for pipe insulation, efforts have been made to find alternative manufacturing strategies to bypass the need for HCFCs. More recently, in markets where there is sufficient demand for pipe insulation of a specific dimension, it has been possible to transfer substantial portions of the previous production to continuous pipe section laminators. This, in turn, has enabled a shift from saturated HFCs to hydrocarbon (typically pentane) blowing agents.

The overall missed opportunity in climate terms for phenolic foam is estimated to be less than 50 million tonnes CO_2-eq in non-Article 5 countries.

For Article 5 regions, the first thing to note is the relatively low level of consumption involved. Indeed, the very few block foam manufacturers in the pre-2000 period elected to run their plants through to CFC phase-out and then close them down. This explains the lack of any actual consumption avoided in the decade from 1990-2000.

From 2000 onwards, new capacity began to emerge, but this was either already based on HCFCs (for discontinuous processes) or on hydrocarbons for continuous lamination processes. With phenolic boardstock demand being the continuing driver of growth, particularly in China, the significance of any remaining HCFC use has continued to diminish. This is also reflected in the climate assessment shown in Figure 3-8. The dominance of hydrocarbon in more recent years means that there is now little to gain from a climate perspective for further action in the phenolic foam sector, with maximum potential savings being less than 300,000 tonnes of CO_2-eq.

Perhaps one point to retain in mind throughout these discussions is that the analysis has not tried to adjust for variations in energy efficiency between technology options. This would have been too complex in sectors where the use of insulation foams is not pre-determined. However, it is worth recalling that there could still be substantial interest in phenolic boardstock manufacturers considering solutions around unsaturated HFC/HCFC technologies if they were to deliver improved thermal performance, particularly in applications where space is constrained.

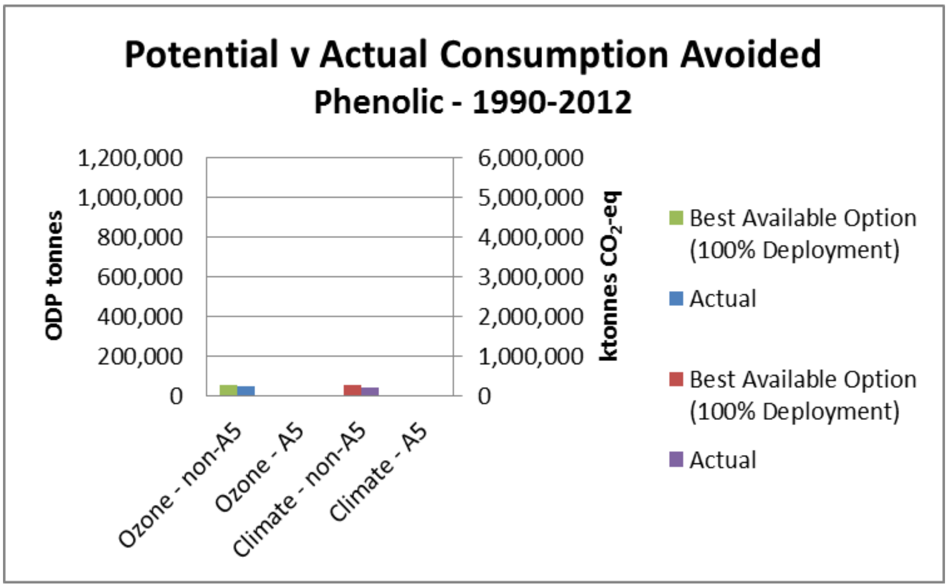


Figure 3-8: Assessment of actual avoided consumption versus potential – phenolic

4 Refrigeration and air conditioning

4.1 ODS alternatives

Initially, generic information relating to selected alternatives substances is provided as presented in the table below. This includes a description of each alternative (including health and safety etc.), extent of commercialisation, general efficiency aspects (taking into account ambient conditions), cost effectiveness (compared to a standard), and barriers (safety, energy efficiency, etc.). Subsequently, additional information, including trends is included in the sub-sector specific section, where applicable. Whilst the convention within TEAP reports has been to only discuss refrigerants with ISO/ASHRAE R-number designation only, it was considered under the current circumstances to also discuss a small number of currently unassigned blends where it is anticipated that they are close to commercialisation and receiving R-number designations. This is against a background of an excess of 50 different unassigned blends currently being cited by different refrigerant producers and elsewhere in the literature.

The majority of these blends comprise primarily various unsaturated fluorocarbons such as HFC-1234yf and HFC-1234ze and HFC-152a and particularly HFC-32 in order to achieve higher vapour pressures. Many proposed blends also include R-744, HFC-161 and hydrocarbons in small proportions. The selection of the composition is typically a compromise between GWP, flammability and cycle performance measures. The huge number of announced blends and those listed within patent literature infers the considerable research and development activities underway.

R-717	
Description and discussion of each technology/chemical (including health and safety etc.)	R-717 (ammonia, NH3) is a single component substance. It has a safety classification of B2 (higher toxicity, lower flammability). It has a zero ODP and zero GWP.
Extent of commercialisation	R-717 has been used for more than 100 years in a variety of different types of refrigerating machines and is widely used today.
Energy efficiency, efficacy	In principle, R-717 has thermo-physical properties which lead to excellent efficiency. The vapour pressure and refrigerating capacity is similar to HCFC-22. However, it has a very high discharge temperature so for lower temperature applications two stage compression is normally needed. The application of ammonia in small to large absorption systems is wide spread, but has to deal with totally different cycle conditions. Efficiency increases are possible due to more stage operations.
Costs, cost effectiveness	The cost of the substance is very low, typically less that $1/kg. Generally systems require the use of steel piping and components and as a result smaller capacity systems can cost much more than HCFC-22 or HFC systems, although as the capacity approaches and exceeds around 400-600 kW, they can become cost-competitive (UNEP 2011, UNEP 2012).

Barriers and restrictions	There are several general barriers. From a practical level these include the lack of suitable components for small capacity systems (although some companies are working on these aspects), due to incompatibility with copper and its alloys. Discharge temperatures are very high and therefore technology options such as additional compression stages and inter-cooling must be adopted in system design. In addition, the use of R-717 required well-trained and competent technicians (in handling R-717), which can sometimes be difficult. Another is the restriction of use (in direct systems) in occupied spaces due to its higher toxicity. Similarly, certain countries have specific national regulations controlling its use. A comprehensive assessment of the barriers to the use of R-717 and other low-GWP refrigerants is provided in a study for UNEP (Colbourne, 2010).
R-744	
Description and discussion of each technology/chemical (including health and safety etc.)	R-744 (carbon dioxide, CO_2) is a single component substance. It has a safety classification of A1 (lower toxicity, non-flammable). It has a zero ODP and a GWP of 1.
Extent of commercialisation	R-744 has been used from 1900 to 1930 in refrigerating machines and then supplanted by CFCs. Since 1990 its use was revisited and it is currently used in a variety of different types of systems.
Energy efficiency, efficacy	R-744 has thermo-physical properties which lead to reasonably good efficiency for certain levels of temperatures (such as for refrigeration range). The vapour pressure is several times greater than usual refrigerants and the volumetric refrigerating capacity is correspondingly higher below around 25°C. However, with a low critical temperature, the cycle efficiency declines as the temperature before the expansion device increases and other features are needed to achieve similar (to HCFC-22) efficiency values at high ambient conditions. For an ambient temperature of 35°C the efficiency of a basic cycle is about 50-60% of R-22. Compared to a basic cycle, 10 – 20% energy efficiency improvement can be achieved by applying an ejector instead of an ordinary expansion device (Hafner et al., 2012) although using an expander alone can bring the efficiency to within 10% of HCFC-22 (Subiantoro and Ooi, 2013). Other features to help improve efficiency in high ambients include economiser (parallel compression), liquid-suction heat exchange and mechanical subcooling. Also, discharge temperatures are very high and therefore, where the high temperature is not to be utilised, technology options such as additional compression stages and inter-cooling must be adopted in system design.
Costs, cost effectiveness	The cost of the working fluid is very low, typically around $1/kg. However, because of the high pressure, certain types of systems require more robust designs for pressure safety which adds cost, while specific tube dimensions are much smaller compared to current technology which gives the advantage of compact tubing and insulation material. Since CO_2 can result in a relatively greater drop in capacity at higher ambient conditions compressors may have to be designed with higher upper speeds to compensate for the reduced capacity at off-design conditions). However, as the capacity approaches a certain value (depending upon the type of application, between 50 – 500 kW), they can become cost-competitive. Similarly the features that are needed to improve efficiency under higher ambient temperature also result in increased cost. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).

Barriers and restrictions	There are two main technical barriers, being components and system design for high operating pressure and performance degradation at high ambient temperatures, leading to a resultant incremental cost increase. (Although at the present time a portion of the additional costs are influenced by economies of scale.) Also, due to its relatively unusual characteristics, technicians require dedicated training and tooling. A comprehensive assessment of the barriers to the use of R-744 and other low-GWP refrigerants is provided in a study for UNEP (Colbourne, 2010).
Hydrocarbons (HCs)	
Description and discussion of each technology/chemical (including health and safety etc.)	Hydrocarbons (HCs) include three main pure refrigerants, HC-290 (propane), HC-1270 (propene) and HC-600a (iso-butane) and a number of mixtures; R-433A, R-433B, R-433C, R-436A, R-436B, R-441A and R-443A, some of which also comprise HC-170 (ethane). All pure substances and the mixtures have safety classification A3 (lower toxicity, higher flammability). They have zero ODP and GWP (direct GWP plus indirect GWP) ranges from 1.8 to 5.5 (WMO, 2010). HCs have excellent thermo physical and transport properties.
Extent of commercialisation	The pure substances have been used commercially for decades, whilst mixtures such as R-436A and R-436B have been used since the phase-out of CFC-12. Most of the other mixtures are not known to be used commercially. Despite their excellent thermo physical and transport properties, large scale production is so far limited in those types of systems which have large charge sizes located within occupied spaces.
Energy efficiency, efficacy	Generally, the efficiency is shown to be good under most conditions. In principle, they have thermo-physical properties which lead to very good efficiency and low discharge temperatures. Performance comparisons for high ambient conditions are sparse, although two recent studies showed performance to be comparable to HCFC-22 (Chen, 2012; Rajadhyaksha et al, 2013).
Costs, cost effectiveness	The cost of the substances is low, typically less that $1 - $10/kg. Due to the safety classification, there are often additional costs necessary for handling flammability characteristics in the design of the equipment, although thermo-physical properties mean that other costs associated with system construction can be reduced. However, the overall cost implication can vary widely depending upon the type of equipment and any standards to which the design needs to comply. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	The main barriers associated with the use of HCs arise from its flammability. In practical terms this means that systems located indoors with moderate to large charge sizes are often restricted. Similarly, concerns by component manufactures means that there are currently gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling HCs if the flammability is to be dealt with safely. Some building safety codes ban use flammable refrigerants in certain types of buildings. A comprehensive assessment of the barriers to the use of HCs and other low-GWP refrigerants is provided in a report for UNEP (Colbourne, 2010).

HFCs (GWP ≤ 300)	
HFC-1234yf	
Description and discussion of each technology/chemical (including health and safety etc.)	HFC-1234yf is a single component refrigerant with a GWP of about 4. It can replace HFC-134a in same systems since the pressure-temperature characteristics are almost identical. It is classed is under FDIS ISO 817 and ASHRAE standard 34-2010 as an A2L refrigerant (low toxicity, lower flammability).
Extent of commercialisation	This chemical is currently produced at one medium scale production plant. Further commercial scale production is anticipated when there is a sufficient market demand.
Energy efficiency, efficacy	In general this refrigerant produces efficiency levels comparable to HFC-134a although the theoretical COP is a few percent below that of HFC-134a.
Costs, cost effectiveness	As a new molecule that requires a complex production process, this refrigerant has significantly higher cost than HFC-134a.
Barriers and restrictions	The main barriers are related to the safe use of lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption, there are currently gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. There are also concerns regarding the decomposition products in the event of a release into the environment.
HFC-1234ze(E)	
Description and discussion of each technology/chemical (including health and safety etc.)	HFC-1234ze(E) is a single component refrigerant with a GWP of 6. It can replace HFC-134a in new equipment where its lower volumetric capacity can be addressed in the design of the equipment. This refrigerant is classified under FDIS ISO 817 as A2L (low toxicity, lower flammability).
Extent of commercialisation	This chemical is already produced at a commercial scale. It is anticipated that this refrigerant will be available as and when there is a market demand.
Energy efficiency, efficacy	When used in reciprocating or scroll type of compressors, this refrigerant produces efficiency levels comparable to HFC-134a. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used.
Costs, cost effectiveness	As a new molecule, this refrigerant has higher cost than HFC-134a. This is mainly due to its different manufacturing process and economies of scale. It is expected that as production increases, the price premium would be reduced although it is likely to remain above current costs of HFC-134a.

Barriers and restrictions	The main barriers are related to the safe use of lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption, there currently are gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. There are also concerns regarding the decomposition products in the event of a release into the environment.
HCFC-1233zd(E)	
Description and discussion of each technology/chemical (including health and safety etc.)	HCFC-1233zd(E) is a single component refrigerant with a GWP of 6, which reduces substantially the direct environmental impact. This refrigerant has been submitted for designation and classification to ASHRAE 34, and is likely to be A1 (low toxicity, non-flammable) under that standard as well as ISO 817.
Extent of commercialisation	This chemical is already produced at a commercial scale for solvents and blowing agent applications. It is anticipated that this refrigerant will be available as and when there is a market demand.
Energy efficiency, efficacy	When used with centrifugal compressors, this refrigerant produces efficiency levels slightly better than HCFC-123, allowing the design of systems with very high energy efficiency.
Costs, cost effectiveness	As a new molecule, this refrigerant has higher cost that HCFC-123. Still this cost would be moderate and will have a reasonable payback period due to its high energy efficiency which lowers the expenses for end users.
Barriers and restrictions	Being non-flammable and having a moderate cost, this refrigerant is on a fast track for adoption. R-number designation application is expected for 2013. There are concerns regarding the decomposition products in the event of a release into the environment.
"L-40" [HFC-32/HFC-152a/HFC-1234yf/HFC-1234ze(E); 40/10/20/30%]	
Description and discussion of each technology/chemical (including health and safety etc.)	L-40 is a mixture of HFCs (HFC-32 and HFC-152a) with the new unsaturated HFCs (HFC-1234yf and HFC-1234ze(E)). With a GWP of 290 it reduces substantially the direct environmental impact. It is intended to replace R-404A in medium and low temperature refrigeration equipment without any major modifications as its pressures are similar. The components of the mixture are under FDIS ISO 817 as A2 or A2L (low toxicity, lower flammability).
Extent of commercialisation	All components are already produced at a commercial scale, although currently the production of HFC-1234yf vis-a-vis the market demands for it in automotive air conditioning may be an initial barrier to be overcome. It is anticipated that this refrigerant will be available during the next 1-2 years.
Energy efficiency, efficacy	When used in the current R-404A system, L-40 is apparently exceeds the capacity of R-404A with an efficiency improvement of around 10%.
Costs, cost effectiveness	The direct cost of this refrigerant is likely to be higher than R-404A. It probably works with existing POE lubricants.

Barriers and restrictions	The main barriers are related to the safe use of the mildly flammable refrigerants (class 2L under FDIS ISO 817). Current standards such as ISO-5149 are being updated to accommodate this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption there currently are gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. The moderate temperature glide of this refrigerant may be an issue for certain applications such as reversible heat pumps. There are also concerns regarding the decomposition products of some of the components in the event of a release into the environment.
"L-20" [HFC-32/HFC-152a/HFC-1234ze(E); 41.5/10/48.5%]	
Description and discussion of each technology/chemical (including health and safety etc.)	L-20 is a mixture of HFCs (HFC-32 and HFC-152a) with the new unsaturated HFC-1234ze. With a GWP of 295 it reduces substantially the direct environmental impact. It replaces HCFC-22 in AC equipment without any major modifications as its pressures are similar. As formulated this mixture will be classified under ASHRAE Std. 34 and FDIS ISO 817 as A2L (low toxicity, lower flammability).
Extent of commercialisation	All components are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years in Asia (China, Japan, Korea), followed by other regions (Middle East, Europe).
Energy efficiency, efficacy	When use in the current HCFC-22 technologies, L-20 matches the capacity of HCFC-22 with an efficiency ranging from 95% to 97%. Further improvements can produce better efficiencies, especially for cooling only operation in warm climates. The above mentioned good performance in warm climates is mainly due to its relative high critical point (~93°C) compared with other options such as R-410A and HFC-32.
Costs, cost effectiveness	The direct cost of this refrigerant is similar to current HFCs such as R-407C. It works well with existing POE lubricants. Due to its good efficiency at high ambient temperatures, power consumption would be lower relative to other options.
Barriers and restrictions	The main barriers are related to the safe use of lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption, there currently are gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. The moderate temperature glide of this refrigerant may be an issue for certain applications such as reversible heat pumps.

HFCs (GWP > 300)	
“L-41” [HFC-32/HFC-1234ze(E)/HC-600; 68/29/3%]	
Description and discussion of each technology/chemical (including health and safety etc.)	L-41 is a mixture of HFCs; HFC-32, the new unsaturated HFC-1234ze and a small amount of HC-600 (butane). It replaces R-410A in AC equipment. This mixture would likely be classified by ASHRAE Std. 34 and FDIS ISO 817 as A2L (low toxicity, lower flammability). It has been already submitted to ASHRAE for classification. It has a GWP of around 460.
Extent of commercialisation	All components are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years in Asia (China, Japan, Korea), followed by other regions (Middle East, Europe). Some countries or regions may take longer than others due to building codes restrictions and lack of regulatory drivers.
Energy efficiency, efficacy	The efficiency of L-41 systems is at the same level of R-410A. The capacity is approximately 6% to 10% lower than R-410A still this capacity is easily recovered in new systems. Discharge temperatures are slightly higher than R-410A, still below the limit of existing compressors technologies. Due to its relative higher critical point compared to other refrigerants, L-41 performs well at high ambient temperatures (warm climates).
Costs, cost effectiveness	The direct cost of this refrigerant is similar to R-410A. It works well with existing POE lubricants. Power consumption increases its effectiveness at high ambient temperatures relative to R-410A.
Barriers and restrictions	The main barriers are related to the safe use lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption means that there are currently gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. Temperature glide issues may influence the design of equipment.
“DR-5” [HFC-32/HFC-1234yf; 72.5/27.5%]	
Description and discussion of each technology/chemical (including health and safety etc.)	DR-5 is a mixture of HFCs (HFC-32) with the new unsaturated HFC-1234yf and has a GWP of 490. It replaces R-410A in AC equipment. All components of the mixture are classified by FDIS ISO 817 as A2L (low toxicity, lower flammability).
Extent of commercialisation	All components are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years in Asia (China, Japan, Korea), followed by other regions (Middle East, Europe).
Energy efficiency, efficacy	The efficiency of L-41 systems is at the same level of R-410A. The capacity is approximately 6% to 10% lower than R-410A still this capacity is easily recovered in new systems. Discharge temperatures are slightly higher than R-410A, still below the limit of existing compressors technologies. Due to its relative higher critical point compared to other refrigerants, DR-5 performs well at high ambient temperatures (warm climates).

Costs, cost effectiveness	The direct cost of this refrigerant would be slightly high as it contains HFC-1234yf which has an expensive manufacturing cost. It works well with existing POE lubricants. Due to its good efficiency at high ambient temperatures, power consumption would be lower relative to R-410A.
Barriers and restrictions	The main barriers are related to the safe use of lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption, there currently are gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings. Temperature glide issues may influence the design of equipment.
“N-13” [HFC-134a/HFC-1234ze(E); 41/59%]	
Description and discussion of each technology/chemical (including health and safety etc.)	N-13 is a binary mixture of HFC-134a and HFC-1234ze(E) which as formulated is non-flammable. It has a GWP of 590 therefore reduces substantially the direct environmental impact. It replaces HFC-134a in new equipment where its lower volumetric capacity can be addressed in the design of the equipment. This refrigerant would be classified by FDIS ISO 817 A1 (low toxicity, non-flammability).
Extent of commercialisation	These chemicals are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years in Asia (China, Japan, Korea), followed by other regions (Middle East, Europe).
Energy efficiency, efficacy	When used in reciprocating or scroll compressors, this refrigerant produces efficiency levels comparable to HFC-134a. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used.
Costs, cost effectiveness	Being a blend of new molecules HFC-1234ze(E) and existing ones (HFC-134a), its cost is moderate and not significant different from existing blends available in the market.
Barriers and restrictions	Being non-flammable and having a moderate cost, this refrigerant is on a fast track for adoption. R-number designation is expected for 2013.
“XP-10” [HFC-134a/HFC-1234yf; 44/56%]	
Description and discussion of each technology/chemical (including health and safety etc.)	XP-10 is a binary mixture of HFC-134a and HFC-1234yf which as formulated is non-flammable. It has a GWP of 630 therefore reduces substantially the direct environmental impact. It replaces HFC-134a in new equipment, producing similar capacity and efficiency. As formulated, this refrigerant would be classified by ISO FDIS 817 A1 (low toxicity, non-flammable).
Extent of commercialisation	These chemicals are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years in Asia (China, Japan, Korea), followed by other regions (Middle East, Europe).

Energy efficiency, efficacy	When used in reciprocating or scroll compressors, this refrigerant produces efficiency levels comparable to HFC-134a. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used. Due to its high critical temperature, it will perform very well in warm climates.
Costs, cost effectiveness	Being a blend of a high manufacturing cost molecule (HFC-1234yf) and HFC-134a, its cost is expected to be high.
Barriers and restrictions	Its high cost would be the main barrier for widespread adoption by the market. There are also concerns regarding the decomposition products of some of the components in the event of a release into the environment.
HFC-32	
Description and discussion of each technology/chemical (including health and safety etc.)	HFC-32 is a single component refrigerant that was originally used as a component of R-410A, which is 50% HFC-32 and 50% HFC-125, and other blends. HFC-125 was used to reduce the flammability of HFC-32 and high discharge temperature. With a GWP of 716, it produces a moderate reduction compared to R-410A or HCFC-22. Pressure and capacity are around 1.5 times higher than HCFC-22 and equivalent to R-410A. It is classed as A2L (low toxicity, lower flammability) under FDIS ISO 817.
Extent of commercialisation	HFC-32 is one of components of R-410A and R-407C, so fairly large production capacity is already available, though commercial availability of cylinders is not yet common.
Energy efficiency, efficacy	The efficiency of HFC-32 systems is similar to R-410A and the theoretical COP is a few per cent better than R-410A at typical air conditioning conditions. The capacity is approximately slightly higher (~ 5%) but it can be easily accommodated with slight adjustment of the compressor displacement in new systems. Its system charge is somewhat lower than for R-410A. It has better heat transfer properties and transport properties than R-410A due to lower molar mass. Discharge temperatures are significantly higher than R-410A. Higher polarity of refrigerant makes necessary the use of new lubricant oils. Some mitigation device or controls are necessary for handling the discharge temperature of the compressor especially at high ambient temperatures.
Costs, cost effectiveness	The direct cost of this refrigerant is lower than R-410A as it is not patented substance, simple molecular structure and lower fluorine necessity in molecule. The new lubricant oils and mitigation devices for high discharge temperature may add some cost. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	The main barriers are related to the safe use of lower flammability refrigerants (A2L under FDIS ISO 817). Standards such as ISO-5149 and IEC-60335-2-40 are being updated to accommodate more relaxed requirements for this new class. In practical terms this means that systems located indoors with large charge sizes are often restricted. Similarly, due to uncertainties over future adoption there are currently gaps in availability of certain types of components including compressors. In addition, technicians must be well-trained and competent in handling flammable refrigerants if the flammability is to be dealt with safely. Some building safety codes may ban use flammable refrigerants in certain types of buildings.

"N-40" [HFC-32/HFC-125/HFC-134a/HFC-1234yf HFC-1234ze(E); 26%/26%/21%/20%/7%]	
Description and discussion of each technology/chemical (including health and safety etc.)	"N-40" is a mixture of saturated HFCs (HFC-32, HFC-125 and HFC-134a) with unsaturated HFC-1234yf and HFC-1234ze, which as formulated is non-flammable. It has a GWP of 1390 and is therefore similar to pure HFC-134a. It replaces R-404A in existing and new refrigeration equipment. This refrigerant would be classified by ASHRAE 34 and FDIS ISO 817 A1 (low toxicity, non-flammable).
Extent of commercialisation	The component chemicals are already produced at a commercial scale. It is anticipated that this refrigerant will be available during the next 1-2 years.
Energy efficiency, efficacy	This refrigerant has a capacity marginally higher than R-404A and a greater efficiency. The same POE lubricant oil can be used as with R-404A.
Costs, cost effectiveness	Being a blend which includes HFC-1234yf and HFC-1234ze, its cost is likely to be higher than conventional HFC mixtures.
Barriers and restrictions	No significant barriers are anticipated with this refrigerant for safety. The moderate temperature glide of this refrigerant may be an issue for reversible heat pump applications. Temperature glide issues may influence the design of equipment.
"DR-33" [HFC-32/HFC-125/HFC-134a/HFC-1234yf; 24/25/26/25%]	
Description and discussion of each technology/chemical (including health and safety etc.)	"DR-33" is a mixture of saturated HFCs (HFC-32, HFC-125 and HFC-134a) and unsaturated HFC-1234yf which as formulated is non-flammable. It has a GWP of 1410 and is therefore similar to pure HFC-134a. It replaces R-404A in new refrigeration equipment. This refrigerant would be classified by FDIS ISO 817 A1 (low toxicity, non-flammable).
Extent of commercialisation	The component chemicals are already produced at a commercial scale.
Energy efficiency, efficacy	This refrigerant has a capacity marginally higher than R-404A and a slightly greater efficiency. The same POE lubricant oil can be used as with R-404A.
Costs, cost effectiveness	Being a blend which includes HFC-1234yf, its cost is likely to be higher than conventional HFC mixtures.
Barriers and restrictions	No significant barriers are anticipated with this refrigerant. The moderate temperature glide of this refrigerant may be an issue for reversible heat pump applications. Temperature glide issues may influence the design of equipment.
HFC-134a	
Description and discussion of each technology/chemical (including health and safety etc.)	HFC-134a is a pure substance with a GWP of 1370. It is used in a variety of equipment including heat pumps and chillers. It is classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally.
Energy efficiency, efficacy	Energy efficiency is good, provided that pipes and heat exchangers are suitably sized.
Costs, cost effectiveness	The cost of the substance is greater than HCFC-22 but less than HFC blends. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	There are no significant barriers to its use.

R-407C	
Description and discussion of each technology/chemical (including health and safety etc.)	R-407C is a mixture refrigerant comprising HFC-134a, HFC-125 and HFC-32 with a GWP of 1700. It has been used widely in air conditioning, chiller and heat pump systems, especially to help the transition from HCFC-22. It is classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally.
Energy efficiency, efficacy	The efficiency is acceptable, although heat exchangers need to be designed suitably to take account of the temperature glide.
Costs, cost effectiveness	The cost of the refrigerant is approximately two to three times greater than HCFC-22. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	There are no significant barriers to its use. The moderate temperature glide of this refrigerant may be an issue for reversible heat pump applications.
R-407F	
Description and discussion of each technology/chemical (including health and safety etc.)	R-407F is a mixture of the same components of R-407C but in slightly different proportions. Its GWP is 1820. It is typically used recently for centralised commercial refrigeration systems. It is classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally.
Energy efficiency, efficacy	The efficiency is acceptable and better than of the R-404A it is normally used to replace. However, heat exchangers need to be designed suitably to take account of the temperature glide.
Costs, cost effectiveness	The cost of the refrigerant is approximately two to three times greater than HCFC-22. Values for cost-effectiveness are expected to be similar to those of R-407C and R-404A as detailed in the TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	There are no significant barriers to its use. The moderate temperature glide of this refrigerant may be an issue for certain applications.
R-407A	
Description and discussion of each technology/chemical (including health and safety etc.)	R-407A is a mixture of the same components of R-407C but in slightly different proportions. Its GWP is 2100. It is typically used recently for centralised commercial refrigeration systems. It is classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally.
Energy efficiency, efficacy	The efficiency is acceptable and better than of the R-404A it is normally used to replace. However, heat exchangers need to be designed suitably to take account of the temperature glide.
Costs, cost effectiveness	The cost of the refrigerant is approximately two to three times greater than HCFC-22. Values for cost-effectiveness are expected to be similar to those of R-407C and R-404A as detailed in the TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	There are no significant barriers to its use. The moderate temperature glide of this refrigerant may be an issue for certain applications.
R-410A	
Description and discussion of each technology/chemical (including health and safety etc.)	R-410A is a mixture refrigerant comprising HFC-125 and HFC-32 with a GWP of 2100. It is used widely in air conditioning, chiller and heat pump systems. The safety is classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally.
Energy efficiency, efficacy	Generally the efficiency is equivalent to R-22 or better, especially at lower temperatures. This efficiency however deteriorates at higher ambient temperatures.

Costs, cost effectiveness	The cost of the refrigerant is approximately two to three times greater than HCFC-22. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	A slight barrier to its use it the operating pressures being higher than that of HCFC-22, although this is more perceived than practical. For countries which experience high ambient temperatures capacity and efficiency can degrade more rapidly than with HCFC-22.
R-404A and R-507	
Description and discussion of each technology/chemical (including health and safety etc.)	R-404A is a mixture refrigerant comprising HFC-134a, HFC-125 and HFC-143a with a GWP of 3700. It has been used widely in commercial refrigeration systems. R-507 has a similar GWP and operates similarly to R-404A. Both are classed as an A1 refrigerant (lower toxicity, non-flammable).
Extent of commercialisation	It is well commercialised globally. R-404A is more widely commercialised than R-507.
Energy efficiency, efficacy	The efficiency is acceptable.
Costs, cost effectiveness	The cost of the refrigerant is approximately two to four times greater than HCFC-22. Values for cost-effectiveness are included in previous TEAP reports (UNEP, 2011; UNEP, 2012).
Barriers and restrictions	There are no significant barriers to its use, although it is now becoming considered less desirable within several regions due to its comparatively high GWP.

Note: Most of the various HFC mixtures without an assigned R-number have a composition that is not yet finalised. Extensive testing by manufacturers is ongoing so minor changes to the composition are still possible. Final compositions for most of the mixtures are expected to be submitted within 2013.

Current usage

Whilst the following sections describe the application of the various refrigerants listed above, this table summarises the application of each alternative within the respective subsectors.

"C" indicates current use on a commercial-scale
"L" indicates limited use such as for demonstration, trials, niche applications, etc
"F" indicates use is potentially feasible on a commercial scale, based on fluid characteristics

GWP	0	1	3 – 5	4	4	6	6	290	330	490	490	600	630	716	1330	1410	1370	1700	1820	2100	2100	3700
	R-717	R-744	HC-290, HC-1270	HC-600a	HFC-1234yf	HFC-1234ze(E)	HCFC-1233zd(E)	"L-40"	"L-20"	"L-41"	"DR-5"	"N-13"	"XP-10"	HFC-32	"N-40"	"DR-33"	HFC-134a	R-407C	R-407F	R-407A	R-410A	R-404A
Domestic refrigeration				C	F							F	F				C					
Commercial refrigeration																						
— Stand alone equipment		C	C	C	L	F		F	F	F	F	F	F	F	L	F	C	F	F	F	F	C
— Condensing units		L	L	F	F			F	F	F	F	F	F	F	L	F	C	F	F	F	F	C
— Centralised systems	L	C	L		F			F	F	F	F	F	L	F	L	F	C	F	C	C	F	C
Transport refrigeration		C	C		F			F	F	F	F	F	F	F	F	F	C	F	F	F	C	C
Large size refrigeration	C	C	L		F			F	F	F	F	F	F	F	F	F	F	C	C	C	C	C
Air conds and heat pumps																						
— Small self contained		L	C		F				F	F	F	F	F	L	F	F	C	C	F	F	C	F
— Mini-split (non-ducted)		L	C						F	L	F	F	F	C	F	F	F	C	F	F	C	F
— Multi-split		L							F	L	F	F	F	L	F	F	F	C	F	F	C	F
— Split (ducted)		F	F						F	F	F	F	F	L	F	F	F	C	F	F	C	F
— Ducted split comm. & non-split		F	L						F	F	F	F	F	L	F	F	C	C	F	F	C	F
— Hot water heating HPs	C	C	C	C	F	F		F	F	F	F	F	F	L	F	F	C	C	F	F	C	F
— Space heating HPs	C	L	C	L	F	F		F	F	F	F	F	F	L	F	F	C	C	F	F	C	C
Chillers																						
— Positive displacement	C	C	C		L	L		F	F	L	F	L	L	L	F	F	C	C	F	F	C	C
— Centrifugal			L		L	L	L										C					
Mobile air conditioning																						
— Cars		F	F		C							F	F				C					
— Public transport		F			L							F	F				C	C			C	

It is important to note that this table only considers direct substitution in systems with limited modifications. The extent of feasibility of many of the alternative refrigerants could be extended if more significant changes to system design were applied, such as use of indirect circuits, etc.

4.2 Over-arching issues

Technician training and disposal

There is a discussion raised concerning the costs associated with training of technicians and the end-of-life/disposal of systems using certain refrigerants, such as flammable ones.

It is important to recognise that training is necessary for all alternative refrigerants and for those with more notable differences from the conventional ones, especially those that affect safety, more intensive training is needed.

In various HPMPs thorough consideration has been given to the additional training needs for technicians handling flammable refrigerants (at installation, service and disposal). Furthermore, various countries have put in place control systems to assess, qualify, licence and register technicians that may be permitted to work on systems and use refrigerants, which have low GWP and/or flammability. These HPMP and certain studies (e.g., Colbourne et al., 2011) show that the training requirements (and also tooling) to handle flammables such as HCs is about double that of a conventional refrigerant such as R-410A or R-407C. For air conditioners, for example, this equates to less than about 1% of the product cost.

There is concern over the disposal of units at end-of-life and more so, concern over how to account for those technicians within the "informal" service sector, who may be working on systems but have not been trained.

This issue applies to systems that contain any refrigerant that has an environmental impact or whose characteristics could impose a safety implication. It is therefore necessary for countries to put in place proper systems to: (a) limit the handling of refrigerants and systems using refrigerants which are flammable, higher toxicity, higher pressure and/or have GWPs and (b) to provide marking and warning on equipment to advise of the risk of handling by untrained technicians. However, it may be considered to be a more critical issue when it concerns flammable refrigerants since improper handling of the refrigerant can pose an immediate hazard to the technician.

Safety rules

Several of the alternative refrigerants possess safety characteristics which can present a greater hazard than the existing ones. These hazards are those arising from higher toxicity, flammability and higher operating pressures. In order to handle these, there are various means of helping to minimise the additional risk posed by applying such refrigerants.

In most countries and regions, there is a hierarchy of rules, involving regulations, codes of practice and standards. In most cases, regulations tend to be generic, that is, how to deal with higher toxicity, flammable and/or high pressure substances, irrespective of their end use. As such, these tend to more measured and treat most applications evenly. Safety standards and codes of practice tend to be largely written by industry and often with certain sub-sectors in mind. In most countries, they are voluntary and cannot override regulations. In some cases, the guidelines within standards and codes can be found contrary to national (or regional) regulations. A more detailed discussion of these matters can be found in Part 1.5 of GIZ (2010).

Specifically for refrigeration and air conditioning, the following international and regional safety standards provide information on the safety classification of refrigerants and also measures that can be applied in order to minimise the risks.

- IEC 60335-2-24 Particular requirements for refrigerating appliances, ice-cream appliances and ice-makers
- IEC 60335-2-40 Particular requirements for electrical heat pumps air-conditioners, and dehumidifiers
- IEC 60335-2-89 Particular requirements for commercial refrigerating appliances with an incorporated or remote refrigerant condensing unit or compressor
- EN 378 Refrigeration systems and heat pumps – safety and environmental requirements
- ISO (FDIS) 5149 Mechanical refrigerating systems used for cooling and heating – safety requirements (draft)
- ISO FDIS 817 Refrigerants – Designation and safety classification (draft)

In addition, GIZ (2010) also contains an extensive list of different national, regional and international standards related to the safe application of refrigerants.

The requirements within the refrigeration and air conditioning standards above have some practical implications on the use of certain refrigerants:

- Toxicity: generally for refrigerants with higher toxicity (principally R-717) the quantity of refrigerant that can be used inside are almost entirely restricted in public spaces. In non-public spaces, additional safety measures such as gas detection and extract ventilation must be used.

- Flammability: many alternative refrigerants are flammable to some extent and this results in a greater limitation of the quantity of refrigerant that can be used in inside locations as opposed to those which are non-flammable. Typically, those with lower flammability and low burning velocity, also referred to as "class 2L" refrigerants,[2] (for example, HFC-1234yf, HFC-1234ze(E), HFC-32, R-717) are permitted to have greater quantities of refrigerant in inside spaces whereas those with higher flammability, or "class 3", (for example, HFC-161, HC-290, HC-1270) are more limited in terms of the quantity of refrigerant (within individual refrigerant circuits). The difference between the quantities of lower flammability (e.g., HFC-32 with an LFL of 0.31 kg/m^3 and HFC-1234yf with an LFL of 0.30 kg/m^3) and higher flammability (e.g., HC-290 with an LFL of 0.038 kg/m^3 and HFC-161 with an LFL of 0.075 kg/m^3) is by a factor of 5-10. The practical implication of these charge size limits is that there is a "capacity ceiling" which is a function of the refrigerants flammability. In addition, equipment must not contain potential sources of ignition (such as devices that can result in electrical sparks). For non-public indoor spaces, larger quantities can be used but only with measures such as gas detection and extract ventilation. Because of the less flammable characteristics of class 2L refrigerants, the current and newly proposed safety rules for the design, construction and installation of refrigeration, air conditioning and heat pumps systems are much closer to those of non-flammable refrigerants than those of "conventional" Class 3 flammable refrigerants.

- Pressure: since almost all refrigerants are under pressure, safety measures are needed. As operating pressures increase and internal volume of system parts become larger required wall thickness to contain pressure becomes thicker. However, more onerous measures are prescribed, such as non-destructive test of welding, application of pressure relief and pressure limiting devices. Thus, those with relatively much higher pressures (for example, R-744) have more requirements.

It is important to recognise that in most cases these standards are voluntary and ultimately risk analysis and risk assessment approaches, in conjunction with regulations, must be used to evaluate new products using such alternative refrigerants. As technical developments evolve, more advanced methods or risk mitigation for refrigerants with hazardous characteristics become available and these can be used to enable application across a broader of systems, than current standards imply.

In some cases, manufacturing enterprises, workers or users may choose not to deal with refrigerants with more severe hazards than those they are used to, in which case the application of many alternative refrigerants may not be open to them. It is noted that accidents can occur due to human error in addition to product faults. Although safety rules, guidelines and experience can help reduce failures, it cannot be guaranteed.

[2] The 2L classification is characterised by lower heat of combustion, higher LFL and lower burning speeds. This class is proposed for use in various international and regional standards, such as ISO 817 and ISO 5149, and has already been adopted into the ASHRAE standard 34. It is intended to help differentiate between certain refrigerants such as R-717, HFC-32 and HFC-1234yf and another lower flammability refrigerant, HFC-152a, in that the former are difficult to ignite, difficult to sustain a flame under prescribed conditions and are not likely to evolve overpressures that could cause damage, whereas the latter behaves more like a fuel gas.

Costs for systems using certain alternatives

The additional costs of systems using alternatives can be a function of several different factors. On the basis of equal cooling (or heating) capacity and the same level of an efficiency measured (depending upon whether it is a fixed rating condition or several rating conditions weighted for some seasonal temperature profile), the differences in cost between a new and an established technology will typically be attributed to the following general cost groups:

- Research and development
- Market introduction cost
- Refrigerant price
- Product/system parts material and machining costs (system and ancillary components)
- Technician tools/equipment
- Engineer training, technician training, assessment, certification and registration
- Regulations (obligations)
- Standards (restrictions)
- Awareness-raising (for engineers, technicians, contractors, end users)
- Production line equipment
- Installation time and materials

Given the large number of considerations implicit within these cost groups, it is extremely difficult to provide robust approximations on what the overall differences in costs associated with a new technology compared to a well-established technology would be, in the event that the new technology would also be well established. The more the characteristics of the alternative refrigerant differ from the established one, the more challenging the cost approximation would be.

Notably, upon the initial stages of considering an introduction of an alternative refrigerant, cost assumptions tend to be pessimistic, whereas over time it if often found that almost cost parity with the established technology may be achieved. Two practical examples of this are HC-600a in domestic refrigeration and R-744 in centralised commercial refrigeration systems for supermarkets (Pedersen, 2012).

Technological developments tend to be iterative and as the implications and trade-offs of the alternative refrigerants' characteristics are better understood, more safety- and cost-efficient designs evolve. Similarly, regulations and standards should be improved; appreciation of the technology by engineers and technicians gradually improves; production and installation practices become optimised.

In addition cost associated with reputation has to be considered. Maintaining the brand value is quite important for manufacturers and suppliers. If accidents, failures, break-downs or environmental negligence occur under a brand name, the reputation can be damaged resulting in a penalty to sales.

System chemistry and lubricant issues

Certain issues have been raised with regards to application of the alternative groups of substances when compared to HCFCs. These can be summarised as follows:

- The chemistry of HFCs, HCs, R-717 and R-744 is significantly different to HCFCs such as HCFC-22.
- There is often a need to change to different lubricants since solubility and subsequent viscosity can be different.
- The hygroscopic nature of alternative lubricants can also be different and thus the appropriate means of handling can change.

- If lubricants contain moisture, the amount that can separate out at the expansion device can vary.
- The reactivity of the alternative lubricant can result in compressor failure if it is handled inappropriately.
- Chemical reaction that could ordinarily be neglected in the system with HCFCs may occur significantly with alternative refrigerants.
- Generally, stricter control of contaminants is necessary when using synthetic types of lubricant rather than mineral oils.
- There are concerns about the stability of certain new refrigerants in the presence of contaminants such as air and moisture.
- Although additives can be used, some manufacturers prefer not to have to rely on these for reliability.
- Refrigerants that may be present in supercritical phase, such as R-744, can experience unusually high solubility that can affect system materials and therefore selection of such materials requires greater consideration.
- Some metals used within compressors, such as aluminium, may not be appropriate in their usual condition for use with fluids that do not contain chlorine.

4.3 Potential penetration rates in the RAC sector

Existing and future market penetration is a key parameter for the calculation of the consumption and emission reduction potential of any medium and low GWP technical option (MLGTO) to current ODS technology. The penetration rate may be defined as the maximum market potential of a MLGTO to replace new products or equipment relying upon ODSs in a particular sub-sector. Penetration rates may be given for each MLGTO based on technical feasibility to replace existing ODSs technology by a specific alternative technology. A penetration rate of 30% means that 30% of the mass of ODS – interpreted as the proportion of new ODS systems installed in a given year – could potentially be replaced by systems using the particular MLGTO.

However, any given MLGTO is rarely universally applicable to any sub-sector. Thus, maximum market penetration for replacement of current ODS technology in a specific sub-sector may in many circumstances only be achieved by aggregation of two or more MLGTOs.

Constraints to market penetration

Limitations of each MLGTO are due to safety, cost and/or efficiency implications and the amount of effort/resources imposed to integrate that MLGTO into the sub-sector. It is therefore necessary to consider the use of each relevant MLGTO for a specific sub-sector within the context of the various limiting factors.

<u>Safety constraints</u>
The application of refrigerants is generally controlled by national regulations, such as those dealing with the use of hazardous substances, buildings and so on. Generally such regulations are non-specific in terms of how refrigerants can be applied and aim towards “safe use”. However, in many countries, safety standards and codes of practice are available, which are more specific in the manner by which refrigerants are applied; noting also that such standards and codes are not normally legally mandatory but are considered as “best practice”.

Many of the currently used ODSs have a safety classification of lower-toxicity/no flame propagation (i.e., class “A1”). This means that they can be applied to most situations without consideration of charge quantity limitations and other safety considerations. However, many MLGTOs are flammable or have higher toxicity or both (typically “A2”, “A3” and “B2” classifications), which results in limitations of the quantity of refrigerant permitted within different locations. As such, where standards specifically limit certain MLGTOs in particular locations, and enterprises choose to adopt these or other such guidelines, this can impact on the penetration rate[3].

Whilst safety standards may partially or wholly restrict certain MLGTOs from being used in certain locations, it is possible to redesign refrigerating systems in order to ensure the refrigerant is kept within an alternative location or reduce the quantity of refrigerant in a system. However, this may then impose other constraints such as related to cost and/or efficiency. Alternatively, efforts can be made to modify and extend the inclusivity of standards, such that more innovative approaches to design can be made by industry (whilst maintaining the same level of safety).

Efficiency constraints

It is a basic principle that any MLGTO under consideration should not risk offset refrigerant-related emissions reduction by consuming more energy. Furthermore, this principle is in line with the fact that in many countries, there are – or will be – minimum efficiency standards for specific product types. Therefore MLGTOs can only be considered where systems would achieve at least the same level of efficiency. In general, most of the MLGTOs under consideration can already provide at least the same level of efficiency as the existing refrigerants. In cases, where MLGTOs have a poorer efficiency than the existing ODS technology when used in comparable refrigerating systems, additional materials and components may be required to bring the efficiency up to the required level, which may incur costs. However, in some cases MLGTOs may not be able to achieve the required efficiency level (even with optimisation), in which case the penetration rate would be limited.[4]

Cost constraints

In principle almost any technically feasible MLGTO can be used for any application, provided unlimited funds are available to implement it. However, the market may not accept products at considerably higher cost (price) than existing products. The cost implication of using different MLGTOs may be affected by several different parameters, including safety requirements, desired efficiency, system complexity and special materials. Therefore it is important to identify situations where MLGTOs may result in excessively high cost such that the penetration potential of those MLGTOs would be limited.

Availability of materials and components

Some refrigerating system parts are specific to certain refrigerants (for example, compressors). Whilst it is feasible to use a given refrigerant within a particular type of system, if no suitable components are available, this would affect the (near term) penetration rate of that MLGTO. Currently, not every refrigerating system could be built with every MLGTO using dedicated “off the shelf” parts; as a result some MLGTO systems would need to be improvised, which could lead to higher costs and/or lower efficiency. Similarly, whilst certain refrigerants are available in sufficient quantities, others – such as newly developed unsaturated HFCs – are not yet commercially available at the scale necessary to satisfy widespread use in certain sub-sectors. As the market availability can be assumed to develop over time, the accurate quantitative assessment of the penetration rates is key condition for the estimation of the ODS and GWP reduction potential in the latter periods.

[3] As an example, R-717 (class B2) is not permitted to be used in direct systems, so the maximum penetration for room ACs would be 0%, whilst HC-290 (class A3) can be used in direct systems provided the charge size is below a certain quantity. Thus, the penetration would be more than 0% but less than 100% because it would not ordinarily be possible to use HC-290 in systems that require a large charge.

[4] As an example, the MLGTO transcritical use of R744 (which is more energy efficient than most HFC systems in geographical zones with moderate climate) could be used in air conditioning systems within temperate climates. The penetration could reach 100% there, but in hot climates the ideal cycle efficiency of R744 would still be below the minimum efficiency of such air conditioners and therefore the penetration would be 0%. Thus, the penetration rate may be reduced according to share of moderate and hot climates.

System complexity and design know-how
Most systems using ODSs are of similar complexity and design. In contrast, design and construction of a refrigeration or air conditioning system running on flammable refrigerants or transcritical R-744 systems require additional knowledge and training. Therefore, design engineers and technicians need to acquire additional know-how in order to install technical technology properly.

Determination of penetration rates

In estimating the maximum potential penetration rate, several factors are considered. For each of the constraints considered above, the proportion (of refrigerant quantity, not necessarily number of refrigerating systems), χ, for each constraint, i, of the sub-sector that could not accommodate the specific MLGTO due to each is estimated. These factors are estimated for some nominal year, being a period sufficient to enable the various temporary constraints to be overcome (assumed to be about 10 years from the present). This should therefore account for both (i) anticipated technical developments and (ii) market maturity.[5] Thus, the overall maximum penetration rate is estimated from $1 - \max\{\chi_i\}$, i.e., the maximum possible penetration under business-as-usual should be based on the maximum proportion of a sub-sector unable to accommodate the MLGTO for any of the given constraints. For each MLGTO the proportions (χ) are based on expert knowledge of the characteristics of the refrigerating systems and equipment, system design characteristics, requirements of safety standards, technology requirements, etc. and coupling these with characteristics of the refrigerants under consideration.

Whilst the constraints detailed above are mechanistic, another constraint may be included to account for the “willingness” of the market to adopt a given MLGTO, which may be a function of the additional considerations necessary to suitably apply a particular technical option. These considerations may include having to get special training for technicians, interpretation of complicated standards and so on. Using this approach the maximum penetration rate could be scaled down. The converse it also applicable, where, for example, certain end user or manufacturing enterprises proactively try to adopt certain MLGTOs and in doing so initiate activities to overcome certain constraints; in this case the penetration rates can be scaled up.

For each MLGTO and sub-sector, a maximum penetration rate is given in Table 1. Penetration rates for some intermediate period (between the present and the selected nominal year for achieving the penetration rates) are obtained from linear interpolation between then and the current status of penetration of each MLGTO.

Estimation of penetration rates for the numerous individual MLGTOs rely on the knowledge of experts. However, it must be noted that the methodology for the determination of penetration rates are subjective and with uncertainties, especially since it is not possible to precisely forecast and quantify the technical developments in the coming years. In recognition of this, at this stage qualifiers have been used to indicate a range of values rather than the use of precise values. In table 4-1 the following are applied:

- D = potentially dominant penetration, 50 %< D ≤ 100%, meaning refrigerant option could become dominant
- C = potentially competitive penetration, 10% < C < 50%, meaning that the refrigerant option can gain a significant market in a competitive context where other refrigerants fit the same need

[5] For example, where charge size limits are a limiting factor, it can be assumed that research and development efforts over the next 20 years will reduce specific charge sizes (kg/kW) to below today's lowest values, or that system components for certain MLGTOs are widely available such that the product development and small production scale costs have been eliminated from the purchase price.

- L = low potential penetration, < 10%, because either the refrigerant corresponds to a niche application or a small market share

Empty boxes imply that potential penetration is negligible or not applicable.

Where square parentheses are used, this implies the use of an indirect system using secondary fluid, that would ordinarily have used a direct system (primarily in the case of supermarkets).

Table 4-1: Example penetration rates (%) for different MLGTOs

	R-717	R-744	HC-290, HC-1270	HC-600a	HFC-1234yf	HFC-1234ze(E)	HCFC-1233zd(E)	“L-40”	“L-20”	“L-41”	“DR-5”	“N-13”	“XP-10”	HFC-32
Domestic refrigeration				D	D							D	D	
Commercial refrigeration														
— Stand alone equipment		D	D	D	D	D		D	D	D	D	D	D	D
— Condensing units		C	C	L	D			D	D	D	D	D	D	D
— Centralised systems	[D]	D	[D]		[D]			[D]	[D]	[D]	[D]	D	D	[D]
Transport refrigeration		D	C		D			D	D	D	D	D	D	D
Large size refrigeration	D	D	C		L			D	D	D	D	D	D	D
Air conds and heat pumps														
— Small self contained		L	D		D				D	D	D	D	D	D
— Mini-split (non-ducted)		L	D		C				D	D	D	D	D	D
— Multi-split		L			C				D	D	D	D	D	D
— Split (ducted)		L	L		C				D	D	D	D	D	D
— Ducted split comm. & non-split		L	L		C				D	D	D	M	M	D
— Hot water heating HPs	L	D	D	C	D	C		D	D	D	D	D	D	D
— Space heating HPs	L	C	D	C	D	C		D	D	D	D	D	D	D
Chillers														
— Positive displacement	C	C	D		D	D		D	D	D	D	D	D	D
— Centrifugal			L		D	D	D							
Mobile air conditioning														
— Cars		D	L		D							D	D	
— Public transport		C			D	D						D	D	

4.4 Domestic refrigeration

4.4.1 Introduction

Domestic refrigeration sub-sector comprises appliances that are broadly used domestically, such as refrigerators, freezers and combined refrigerator/freezer products. Beverage dispensing machines are similar products and are commonly included in domestic refrigeration, but represent a small fraction of total units.

Approximately 100 million domestic refrigerators and freezers are produced annually, and it is estimated that this quantity is equally divided between non-Article 5 and Article 5 countries. A typical product includes a factory-assembled, hermetically sealed, vapour-compression refrigeration system employing a 50 to 250 watt induction motor, and now also linear motors, containing 50 to 250 grams of refrigerant. Commercially available alternative technology to vapour-compression refrigeration is employed in specific products, such as absorption cycles for small fridges in hotels and so. The age distribution of the global installed products is extremely broad with median age estimates ranging from 9 to 19 years at retirement, being higher values typical for Article 5 countries. Long product life and high volume annual production combine for an estimated 1500 to 1800 million unit global installed inventory.

Old refrigerant CFC-12 was replaced by non-ODS refrigerants in almost all new products. Presently, the main refrigerants used are HC-600a and HFC-134a. More than 50% of current new production (globally) employs HC-600a, whilst the remainder uses HFC-134a (approximately 1% employs either HFC-152a or HCFC-22 or blends comprising these).

Improvement in energy efficiency is the main effort in new product development, through the use of advanced components such as variable speed compressors (virtually all new high level products in Europe have frequency variation device) and vacuum panel insulation. Energy benefits are also obtained with the use of electronic controls.

In certain countries progress continues on product redesign for the transition from HFC-134a to HC-600a.

4.4.2 HFC-134a

HFC-134a was originally the predominant refrigerant for domestic refrigeration since the phase-out of CFC-12. It is a class A1 refrigerant (lower toxicity, non-flammable) and as such there are no significant safety implications concerning its use.

Energy efficiency is similar to that of CFC-12, although with continual optimisation the current HFC-134a refrigeration units are considerably more efficient that those that used CFC-12, and the products are marginally more costly than CFC-12 because they are less compact.

4.4.3 HC-600a

HC-600a was the other main energy-efficient and cost-competitive alternative to HFC-134a used for CFC-12 replacement. Concerns in connection with the high flammability at the introduction of the refrigerant in 1994 in Europe no longer exist, particularly as the charges required for domestic refrigeration are below 150 g.

When the statutory requirements for safety are met (e.g. IEC 60335-2-89), HC-600a is the ideal refrigerant for domestic refrigeration products, giving about higher efficiency than HFC-134a while at the same time reducing noise level of the unit. .

According to (Schwarz et al., 2011), in a study for a review of the European Regulation (EC) on fluorinated greenhouse gases, the investment cost for domestic refrigeration HC-600a equipment is 1,7% higher than for HFC-134a, which is in real terms represents around €7, considering European average costs. Basically due to larger size of compressors and higher production cost related to the requirements for safety systems. The report also mentions that annual running costs and lifetime cost of HC-600a equipment are lower, resulting in overall negative cost differential in case of HC-600a.

In general there are no significant barriers to the use of HC-600a, exemplified by the existence of over 500 million domestic fridges in the market to date. However, in some regions the use of HC-

600a is almost non-existent (e.g. USA) and this can be considered to be due to a number of factors. These include general concerns regarding public safety (or the perception of), misconceptions about flammability safety and accidents and are similarly reflected in the restrictive national standards and the reluctance to be one of the early movers in the region. Whilst legal concerns have so far limited the use of HC-600a in USA, in 2011 their Environmental Protection Agency (EPA) approved HC-600a and an HC blend (R-441A) under their Significant New Alternatives Policy Program (SNAP) for household and small commercial refrigerators and freezers. As such some North American manufacturers have started production of high-end products with HC-refrigerants.

HC-600a is the standard refrigerant for European domestic refrigerators and freezers. Worldwide over 50 million appliances each year are produced with HC-600a. Increased energy efficiency and the use of HC-600a refrigerant have drastically reduced the climate impact of household refrigerators, due to mitigation of direct (refrigerant) and indirect (CO_2 associated with electricity consumption) GHG emissions.

4.4.4 Other refrigerant alternatives

HFC-1234yf

It is feasible to use HFC-1234yf in domestic refrigerators and freezers and its application can be considered as some way between the use of HFC-134a and HC-600a, since the pressure and capacity are slightly lower than HFC-134a and it has lower flammability characteristics than HC-600a. The lower flammability makes application easier in countries that have still strong reservations related to the application of HC-600a.

Initial developments to assess the use of HFC-1234yf in domestic refrigeration have begun, but it is not being pursued with high priority, which is more demanding in automotive applications. A preliminary assessment is that HFC-1234yf has the potential for comparable efficiency to HFC-134a, although often slightly worse in practice. As such, investment costs for equipment are estimated to be 1% higher than for HFC-134a technology due to the larger surfaces of heat exchangers applied (to account for poorer energy performance) and given the price, an additional 1% higher investment cost results from the cost of the refrigerant for the first charge. As implied above, two main barriers are the cost implications and the flammability, although in most cases the latter is not of major concern given the acceptability of HC-600a.

R-744

Currently, experience on the use of R-744 is available from a large number of vending machines which have been in use since many years, and are similar, low-charged applications.

R-744 application will imply an additional cost, which can be attributed to the greater mass of materials necessary to achieve the minimum level of efficiency, particularly for freezers in all climates and for both refrigerators and freezers in warmer climates. However, since the majority of these appliances are used indoors, the impact of outside temperature will have a lesser impact on the ambient temperature and thus the efficiency degradation. Higher cost is also predicted in the evaporator construction when applying high pressure R-744.

The main barrier associated with the use of R-744 in these systems is that a higher cost requirement associated with the system materials, thus making commodity products uncompetitive. In addition there are some more peripheral hurdles such as a general perceived fear of high pressures, effects of national and international standards which requirements result in greater cost, lack of training materials and higher costs for servicing equipment.

No major domestic refrigerator manufacturers are actively developing R-744 systems for commercialisation, so it is unlikely that its use will become widespread in this sector.

Due to the cost-efficiency implications and the fact that other low-GWP alternatives (such as HC-600a) are widely accepted, it is unlikely that R-744 will become commercialised to any major extent.

4.4.5 Not-In-Kind

Considering not in kind technologies that are in the way to get closer to commercialization, magnetic refrigeration can be cited, and two firms have recently announced plans for commercialization of products based on this technology (Heat TS, 2013).

Magnetic refrigeration does not use refrigerant and employs an active magnetic regenerator, comprising magneto-caloric materials exposed to an intermittent magnetic field. At lower cooling power, it presents higher efficiency over conventional vapour compression.

To decrease the price of the technology, the use of an iron-based alloy to provide the magnetic charge has been considered as an alternative to the rare-earth magnets such as gadolinium used originally.

4.5 Commercial refrigeration

Commercial refrigeration is characterised by storing and displaying food and beverages at different levels of temperature for chilled and frozen food. The refrigerating capacities of equipment vary from some hundreds of Watts to 1.5 MW. Commercial refrigeration consists of three main categories of equipment: stand-alone equipment, condensing units, and supermarket systems. Refrigerant choices depend on the refrigerant charge, the level of temperature, the energy efficiency, as well as on regulations.

4.5.1 Stand-alone equipment

Stand-alone equipment consists of systems where all refrigeration components are integrated; in case of the smallest types, the refrigeration circuit is entirely brazed or welded.

R-717 has not so far been used in these systems due to limitations on its use in occupied spaces related to safety and toxicity concerns.

Carbon dioxide is mainly used in vending machines and bottle coolers; the technology is operating well, but forms a technical challenge. The energy efficiency of the vending machine and bottle cooler cassettes is similar to HFC-134a machines with an energy penalty at high ambient temperature conditions. The cost is slightly higher, but the one global company so far ordering this type of equipment has made a political and environmental choice. R-744 has been chosen instead of hydrocarbons since the safety risk in public areas is lower. The high technological level of expertise required forms a barrier for the application.

Where it concerns low GWP HFCs, HFC-1234yf can replace HFC-134a in any application but availability of HFC-1234yf is limited and therefore there is no large amount of equipment available. The energy efficiency of HFC-1234yf will be in the same range as the one of HFC-134a, based on tests published. There are reciprocating compressors that are already approved for the use of HFC-1234yf. Vending machines using this refrigerant have already been introduced in Japan. As mentioned, a barrier for the current application is the refrigerant availability question. To some extent, the additional cost of the chemical would increase the cost of the equipment a small amount.

HC-600a and HC-290 are the two hydrocarbons used for small commercial equipment. HC-600a is chosen for smaller refrigeration capacities. For bottle coolers both refrigerants will be used. Ice machines and small display cases use HC-290. The energy efficiency of a hydrocarbon based system is always as good or even better compared to HCFCs or HFCs as commonly used in those applications. The small additional cost associated to safety is integrated in the price, increasing the price a small amount compared to HFC equipment.

The EN 378 standard in Europe allows the use of HCs up to 1.5 kg in public areas if the volume of the room is sufficiently large. Large global food companies have committed to not use HFCs in their new systems. The uptake of HCs is significant for small commercial equipment with refrigerant charges varying from 15 g to 1.5 kg.

HFC-134a and R-404A are still the dominant refrigerants for stand-alone equipment; in Europe R-404A is currently seen as a short-term option. Where it concerns barriers and restrictions, the GWP is the issue for both refrigerants and potential future regulations, including the ones set for the EU, are expected to eliminate or severely restrict the option of R-404A due to its GWP compared to lower GWP options available, while also limiting future use of HFC-134a under an HFC phase-down.

At this stage, there are three possible replacements for R-404A:

1) R-407F, which is an intermediate solution with a GWP of 1800, i.e. half the GWP of R-404A, or other similar lower GWP blends of saturated HFCs (such as R-407A);
2) Non-flammable options such as new low GWP HFC blends such as N-40 and DR-33;
3) Low flammable refrigerant blends such as L-40 or DR-7, which enables a further reduction of the refrigerant GWP.

As for HFC-134a, there are also three types of replacements:

1) Non-flammable options such as N-13 and XP-10;
2) Class 2L flammable refrigerants such as HFC-1234yf and HFC-1234ze(E);
3) Class 3 refrigerants such as HC-600a and HC-290.

The saturated HFCs (and blends consisting mainly or wholly of them) are still the current standard options but are not seen as viable longer than 10 years.

4.5.2 Condensing units

Condensing units exhibit refrigerating capacities ranging typically from 1 kW to 20 kW. They are composed of one (or two) compressor(s), one condenser, and one receiver assembled into a so-called “condensing unit”, which is normally located external to the sales area. Condensing units are typically installed in specialty shops such as bakeries, butcher shops, and convenience stores. In most Article 5 countries there is an extensive use of condensing units.

R-717 is never used in these systems for cost and safety issues. Some new carbon dioxide based condensing units are sold in Northern Europe, but the market penetration is low. R-744 systems require a double-stage design if high ambient temperatures occur frequently. Single-stage systems are designed for cold climates. The additional cost for a double-stage system is significant; cost is the main barrier for these R-744 systems. Further development is possible when there are general decisions to not choose HCs; however, it is likely that the future market share will be limited.

Several indirect condensing units with HC-290 or HC-1270 are operating in Europe with typical refrigerant charges varying from 1 to 20 kg. The energy efficiency is good. The indirect system energy penalty is limited if the secondary loop is well designed, with larger heat-exchanger areas. Costs for these HC based systems are typically 5 to 15% higher compared to HFC systems.

Choosing hydrocarbons usually requires a “policy” decision of the commercial chain management. The development of hydrocarbons for condensing units depends on the outcome of the competition with future low GWP HFCs. Hydrocarbons are seen as one possible long-term solution and require a better refrigerant management due to safety precautions in maintenance.

A number of possible low GWP blends (e.g., L-40, N-40) have been introduced in technical conferences, however, so far there are no commercially available options in this subsector. Most of the activities are at the level of trials by manufacturers.

HFC-134a, R-404A, and, to a small degree, R-410A are HFCs of choice for condensing units. HFC-134a is chosen for small capacities and evaporation temperatures > -15°C. R-404A or R-410A are chosen for larger capacities for all temperature levels. HFCs form the energy efficiency references for benchmarking other refrigerants. R-407A and R-407F are the alternative options at present, N-40, DR-33, L-40 and DR-7 may all be future options.

As in all other commercial applications, the high GWP HFCs are seen as short-term options, even if they are still dominating the market at present.

4.5.3 Centralised systems

Centralised systems are the preferred option in supermarkets. They operate with racks of compressors installed in a machinery room. Two main design options are used, i.e., direct and indirect systems.

Direct systems are the most widespread. The refrigerant circulates from the machinery room to the sales area, where it evaporates in display-case heat exchangers, and then returns in the vapour phase to the suction headers of the compressor racks. The supermarket cold rooms are cooled similarly.

Ammonia is used in indirect systems for large capacities; usually carbon dioxide is then used at the low-temperature level. Due to safety issues, the number of installations is limited so far. Ammonia is an efficient refrigerant for refrigeration applications. The additional cost is in the range of 10 to 15% compared to indirect systems using HFCs and R-744, because of the use of steel instead of copper, although at capacities larger than several hundred kW, economics of scale make them more competitive. Ammonia competes with HFCs, hydrocarbons and even with carbon dioxide in cold climates, however, ammonia will remain dependent on the user preference. Even though it is an efficient solution, it is unclear what its future market potential in this sub-sector will be.

R-744 systems are applied in either cascading systems (several options) or in transcritical systems (single stage or two stage equipment).

The preferred option for large European commercial companies is HFC-134a at the medium-temperature level (-10 to -15°C) cascading with a R-744 direct system for the low temperature (-35 to -38°C), since this is a global option, applicable in all climates.

R-744 is efficient for a condensing temperature below 25°C. Based on this energy efficiency in moderate climate zones, two stage transcritical systems have seen a significant expansion in Northern Europe with more than 1300 centralised systems of various cooling capacities in 2011 (Shecco, 2013). The penetration rate of those transcritical systems has to be carefully monitored for high ambient temperatures (above 30°C), where the trans-critical cycle implies a significant energy penalty, although developments are on-going to make the R-744 technology more energy-competitive under these conditions. The additional cost is again limited to 10 to 15%. The lower energy efficiency for high ambient temperatures forms a barrier. The high pressure under which R-744 operates requires a higher brazing quality than used for the usual HFC design. R-744 is seen as a long-term solution for low temperatures in cascade with a medium-temperature refrigerant. Taking into account ambient climate conditions, R-744 alone is seen as the main option for Northern and Central Europe and elsewhere with similar climates. In summary, R-744 clearly is an important option for centralised systems in future commercial refrigeration, either in cascade systems with another refrigerant at the medium temperature level or in trans-critical systems.

Hydrocarbons are applied in about 100 centralised systems in Europe that use either HC-290 or HC-1270; there has been no significant commercial expansion during the last five years. HC-290 or HC-1270 is efficient in both medium and low temperature stages of commercial refrigeration equipment. The additional costs are related to containment and safety. The refrigerant charge limit, directly associated with regulations and standards, forms a barrier. The competition with R-744 as a low GWP option has limited the expansion of HCs in centralised systems. In summary, HCs in large centralised systems will have a limited market share mainly due to safety issues.

For low GWP HFCs, the situation is similar to what has been previously mentioned; there is no available single low GWP HFC currently proposed for centralised systems. Non-flammable options such as the blends N-40 and DR-33, which can be used for retrofit of existing systems, may improve energy-efficiency (~7%). Lower flammability refrigerants such as L-40 can be used in indirect systems such as with brine or pumped CO_2 where the flammability can be addressed. For HFC-134a, there are additional replacements. Non-flammable options such as N-13 and XP-10 can be used for the retrofit of existing systems. Furthermore, lower flammability refrigerants such as HFC-1234yf and HFC-1234ze(E) could be applied in cascade systems at the medium temperature level.

In the non-low GWP refrigerant series, R-404A is currently the dominant refrigerant; however, it is now being replaced in new installations by HFC-134a, specifically at the medium-temperature level. Some trials have been done using R-410A in new installations without significant success. R-407A and R-407F have also been proposed as intermediate options.

The price levels of R-404A are currently decreasing. The GWP of R-404A will limit its use in Europe over the next few years, in particular due to the updated F-gas regulation that will enter into force. As a conclusion, high GWP HFCs have a limited future in all developed countries, much dependent on when (HFC) regulations enter into force.

4.6 Transport refrigeration

Technical requirements for transport refrigeration systems are extremely complex. The equipment has to operate over a wide range of ambient temperatures and weather conditions (wind, solar radiation, rain, sea water spray, etc.). The equipment has to be able to carry any one of a wide range of cargos with different temperature needs and even different temperatures simultaneously in different compartments.

The refrigerant of choice for transport refrigeration systems within non-Article 5 countries is HFCs, with refrigerant charges from less than 1 kg (refrigerated vans) to more than several kg (trucks, trailers and reefer containers) to 3,000 kg on board large fishing vessels (Schwarz et al., 2011). Leakage rates are estimated at 20% for trucks/trailers, 30% for vans and up to 40% for fishing vessels (Schwarz et al., 2011). All intermodal containers use hermetic or semi-hermetic systems, which have an estimated leakage rate below 5%.

Trucks, trailers and intermodal containers.

R-404A has become a preferred choice for practically all trailers and large trucks. One German manufacturer uses R-410A. HFC-134a is used in small trucks and vans, because they can utilise automotive components. Not that HFC-134a is excellent – it is convenient. Some small trucks and vans use R-404A when a higher capacity is needed. ODS have not been used in new equipment for many years.

A phase-out of current refrigerants with an objective to reduce the refrigerant GWP would put all road transport equipment on the spot. Testing of low-GWP alternatives is in progress elsewhere, but no option seems viable in the short term. The main issue is that the performance of R-404A is difficult to meet. Although R-410A outperforms R-404A, it has higher pressures (requires technology change for most manufacturers) and it still has a relatively high GWP.

HFC-134a and its low-GWP alternatives may look attractive, but validations for frozen cargo (in addition to chilled cargo where it could be acceptable) have to be done.

Current and previous tests with trucks using R-744 suggest that introduction of R-744 will be possible when more efficient compressors with more than one compression stage, which are under development, will be commercially available. In 2012, three manufacturers of transport refrigeration equipment exhibited concepts of trailer or vans refrigeration units with R-744 at a trade show (Thermoking, 2012; Konvekta, 2012; Carrier, 2011). Although these systems feature several advantages, a detailed comparison with today’s standard equipment, and development leading to market introduction, is yet to be seen. The challenges include reduced energy efficiency under high ambient temperatures, larger physical space requirements, possible higher failure rate associated with circuit complexity, and higher price, at least initially.

The use of hydrocarbons (mainly HC-290) in truck refrigeration units has been tested with a small number of vehicles in the UK, Australia and Germany. If not for flammability concerns, they would be the preferred choice because they can provide lower energy consumption in the order of 20% or more. Recently, a refrigerated truck with propene (HC-1270) was developed by a German company and is now in field tests for a supermarket chain in Germany. The system was reported to be superior to R-404A and comparable to R-410A (Burke, 2011). For a broader market introduction, manufacturers and customers require specific legal rules and standards for hydrocarbons to ensure safety in mobile applications.

In contrast to trucks and trailers, intermodal containers use HFC-134a in most cases and R-404A in some. The reasons for choosing HFC-134a could have been the global availability of HFC-134a, and lower cost per kg, otherwise R-404A (or today R-410A) would be more suitable. Because HFC-134a systems operate at lower pressures, they can have lower leak rates than R-404A but also a higher risk of air intake to circuits cooling frozen cargo.

Initial field tests with small fleets of containers using R-744 have started. In 2011, a large global manufacturer of transport refrigeration equipment exhibited a container refrigeration system with R-744 at a trade show. By using two-stage compression, cylinder unloading and variable speed drive, the R-744 design was reported to deliver efficiencies equal to their best-in-class R-134a HFC container unit (Carrier, 2011). Griffin (ATMOsphere Europe, 2012) states that while energy efficiency of the R744-unit on average, taking all ambient temperatures experienced by the marine container at sea into consideration, was better at high cargo temperatures (up to 30% at 14 °C) it was lower by 25% for frozen cargo (-18 °C).

Ammonia is deemed unacceptable in all truck, trailer and intermodal container applications because of toxicity and material compatibility.

Cryogenic or open loop systems, which evaporate the liquid CO_2 or N_2 charged to an insulated container aboard the truck, are alternatives to the vapour compression cycle for recurring distribution routes. The systems have advantages of being quiet and reliable. They offer a constant capacity that is independent of the engine (vehicle) speed. On the other hand, systems that discharge CO_2 or N_2 to the cargo box (not all do) bear a risk of asphyxiation if not equipped by gas sensors. They require energy for the liquefaction of the cryogenic liquid, which can make the systems more or less expensive to operate, depending on the energy source. The systems need periodic refilling; consequently, the user needs to provide storage and refilling infrastructure for the liquefied gases. Energy usage of cryogenic systems has been evaluated with various outcomes. While some reports claim that the systems are the most inefficient and least environmentally friendly because of energy demand for gas liquefaction, other studies estimate the overall energy consumption from extraction to consumption of liquid nitrogen systems to reduce the CO_2 emissions several times, compared to diesel engine powered trucks.

One Japanese manufacturer has developed a system using ice slurry charged trucks for delivery of chilled goods in large cities with air pollution restrictions. The ice slurry is produced in a stationary refrigeration system and special compartments on board the trucks are charged with ice slurry prior to loading chilled food. Ice slurry can due to its heat of fusion keep truck and food cool for 8 to 10 hours.

Vessels

The variety of types is great. The majority of them uses HCFC-22, which can be replaced by R-417A or R-422D. Other HFC alternatives, namely R-410A, R-407C and R-427A, require modifications. The GWP of these fluids ranges between 1700 and 2700. Modern cruise ships use R-410A and HFC-134a for air conditioning. Where refrigeration is needed for provision rooms or process cooling, R-404A is used. Low-GWP alternatives are considered, but except R-717 and R-744 in limited numbers, these options have not been commercialised.

An important issue aboard ships is safety – ships are difficult to evacuate. Specific requirements inherent to vessels mean that not all stationary systems can be applied at sea, and if so, they require modifications.

Natural refrigerants have been commercialised to some extent aboard marine vessels world-wide (ammonia, CO_2) (RTOC, 2010). For European fishing vessels highly efficient ammonia-CO_2-cascade systems are the systems of choice, using approximately 6% less energy (Schwarz et al., 2011).

Hydrocarbons are technically feasible, but the strict safety concerns currently do not favour application of flammable refrigerants aboard vessels.

4.7 Industrial refrigeration

Industrial refrigeration systems are characterised by heat extraction rates in the range 10 kW to 10 MW, typically at evaporating temperatures from –50 °C to +20 °C. About 75% of all industrial refrigeration capacity is installed in the food industry, the rest in industrial processes and leisure applications (Schwarz et al., 2011). Over 90% of the large industrial refrigeration installations use R-717 whereas the market share of R-717 is only 5% (India and China) to 25% (Europe and Russia) for smaller industrial refrigeration systems (RTOC, 2010). Ammonia is not used in very small systems, which tend to require hermetically sealed units. Toxicity is an additional concern for ammonia in light industrial applications. Currently, low GWP options for small industrial refrigeration systems include hydrocarbons and carbon dioxide.

Industrial ammonia systems are in general 15% more energy efficient than their HFC-counterparts and 40% of the European industrial refrigeration systems use R-717 (Schwarz et al., 2011). While industrial refrigeration systems using R717 are very tight due to the pungent smell of R717, HFC systems in the EU show leakage rates of 8-10% at present (Schwarz et al., 2011).

Carbon dioxide can be used in some cases as an alternative to glycol or brine solutions, offering significant reductions in volume flowrate which gives operating cost reductions of up to 20% (Maratou, 2013).

Alternatives to HCFCs include R-717, which is already widely used, hydrocarbons, R-744 for low temperature (freezing), HFCs and air for very low temperatures.

A replacement of a 3.2 MW HCFC-22 refrigeration system by one using R-717 resulted in 40% reduction of energy consumption (McNeill, 2011). As the new plant utilises heat recovery and water heating by means of an additional heat pump, the total annual cost savings are more than £1.4 million, resulting in a payback time of 2.7 years (McNeill, 2011). Applying improvement levers such as reduced condensing temperature, increased evaporation temperature, variable speed compressors and multistage systems, the energy consumption of the ammonia plants can be drastically reduced (Gerwen, van, 2011).

Hydrocarbons are not widely used, other than in situations where safety measures are already required, e.g. in a petrochemical plant or for compact chillers. They offer excellent efficiency, and compatibility with most materials and lubricants. However the precautions required to prevent ignition are significantly more expensive than those required for ammonia systems (RTOC, 2010).

R-744 is used with excellent efficiency in systems as the low temperature stage to a cascaded upper ammonia system especially in the food industry where the refrigerant has to evaporate in freezing equipment in the factory. According to van Gerwen (2011) “the use of R-744 as a refrigerant in the low pressure stage of a cascade refrigeration system, with ammonia in the high stage, could be an opportunity for further improvement”. In colder climates R-744 is energy efficient as the sole refrigerant.

Air can be used with good energy efficiency in low temperature applications, namely below -60 °C. At least one manufacturer is offering such systems (Machida, 2011).

According to Unilever: “The refrigerant choice for industrial refrigeration is ammonia, using an optimised standard core design concept and an appropriate safety management system” (van Gerwen, 2011). Nestlé committed to the use of natural refrigerants in 2001, and has since also supported the use of R-717/R-744 systems: “As already publicly stated in 2001, Nestle reiterates its commitment to the use of natural refrigerants that are environmentally friendly. Especially and whenever feasible, carbon dioxide (CO_2) in combination with ammonia (NH_3) must be used for all low temperature applications. Beyond many technical and economic advantages, carbon dioxide is safer for the environment, people and goods” (Nestle, 2008).

Industrial refrigeration sometimes uses compression chillers; these are discussed in more detail in section 4.9.

4.8 Air conditioning and heat pumps

4.8.1 Small self-contained (window, portable, through-the-wall, packaged terminal)

Small Self-Contained (SSC) air conditioners are small capacity air conditioners in which all of the refrigeration system components are contained within a single package. These products have cooling capacities typically ranging from 1.0 kW to 10 kW. This category of products includes window mounted, through-the wall, portable and packaged terminal ACs. Small self-contained ACs are designed to heat or cool single spaces, such as bedrooms, small shops, restaurants and offices.

R-717 has so far not been used in these systems due to limitations on its use in occupied spaces related to safety and toxicity concerns. In addition, the construction requirements for smaller capacities would take up too much space as well, in that conventional components using copper or copper alloys are not compatible with R-717.

R-744 is not widely considered for use in SSC ACs. However, there are developments on units for specific purposes, where both cooling and heating is needed, such as so-called environmental control units (ECUs). Whilst the performance at lower ambient temperatures may be favourable, as the temperature approaches or exceeds the critical temperature of R-744 (31°C), efficiency can degrade at a greater rate than refrigerants with much higher critical temperatures. Thus, at standard rating conditions, which typically require a 35°C outside air temperature (e.g., EN 14511) the efficiency of a “baseline” cycle (Lorentzen, 1988) non-enhanced R-744 system is theoretically lower than for other refrigerants. Nevertheless, recent work on this type of system using advances features such as ejectors have shown to improve efficiency considerably even at high ambient temperatures, comparable to conventional units (e.g., Liu et al, 2012; Lee et al, 2011). However, when systems are designed also to provide heating, the overall efficiency can even for countries which experience hot climates be favourable (e.g., Hafner et al, 2007). Literature relating to the costs associated with the use of R-744 in SSC ACs is sparse, but depending on component selection and material requirements, R-744 units about 150-200% of units with HCFC-22.

In conclusion it can be said that there are developments ongoing globally for R-744 systems, but no production of systems except for niche applications. The main barriers for SSC air conditioners are those described previously in regards to efficiency and cost implications. In addition, there may also be poor availability of components in certain regions. Due to efficiency implications, the use of cooling only R-744 systems is not really feasible. Where reversible models are developed, this technology is considered to be more interesting. It is possible that some commercially available products will become available in the future but only for regions where both cooling and heating is required.

HC-290 has been used in portable ACs for many years and several companies are producing them. Window units are also under development. HC-290 seems to be preferred over HC-1270 for smaller capacity systems, whilst HC blends are not known to be in use. HC-290 has the same or higher COP than HCFC-22. For example, Teng et al (2012) reports HC-290 has the same or greater cooling capacity and a higher COP than HCFC-22, provided the charge is properly optimised. At higher ambient temperatures the performance deterioration of HCFC-22 and HC-290 are equivalent. For SSC systems, there is negligible additional cost, if at all, considering the additional cost for safe electrics and cost savings from the use of smaller heat exchangers. Zheng (2012) reports that the overall cost for a specific HC-290 model using R-290 compressor and dedicated lubricant is less than an R-410A model, whilst gaining 10% improvement in efficiency. For SSC ACs the safety issues pose less safety-related hurdles than for systems that have to be site-installed because refrigerant handling is not necessary. However, certain safety standards impose obstructive limits on refrigerant charge sizes for certain categories of equipment. Nevertheless, several manufacturers are now newly developing HC-290 SSC ACs. In conclusion, HC-290 is an attractive refrigerant for SSC ACs, offering good efficiency and cost implications.

R-407C has been used in a large proportion of SSC ACs, more so earlier on in the transition from HCFC-22 in non-Article 5 countries since the vapour pressure is a close match for HCFC-22. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. Energy efficiency is typically poorer than HCFC-22, although similar COPs can be achieved for cooling -only equipment, if the system is carefully designed to accommodate temperature glide. Comparable efficiency in heating mode is difficult achieve with reversible systems. Generally systems are marginally more costly than HCFC-22. Since R-407C is well established, it is evident that there are no significant barriers to its use. Where R-407C has been used widely, it use is declining in favour of R-410A whilst in other countries who transitioned from HCFC-22 later, it is unlikely that it will be used to any significant extent.

R-410A is used in most SSC ACs, where HCFC-22 is not used. The design of the system components is different because of the higher operating pressure. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. Energy efficiency is about the same as HCFC-22, although higher COPs can be achieved if the system is carefully designed. As ambient temperatures increase the efficiency (and cooling capacity) degrades at a greater rate than HCFC-22 does. Generally systems are marginally more costly than HCFC-22. Since R-410A is well established, it is evident that there are no significant barriers to its use, except for the issues relating to high ambient temperatures and concerns within the service sector over the higher operating pressures. Currently, R-410A is developing as the standard refrigerant for air conditioning systems.

It is feasible to use HFC-32 in SSC ACs, for example, where R-410A is already used. Although HFC-32 is flammable, the required charge of such units is unlikely in the event of a leak into the room to reach concentration that can be ignited (LFL). HFC-32 has the optimum heat transfer at higher flow rate in heat exchanger compared to HCFC-22 and R-410A, so a relatively better COP can be achieved in compact products. Energy efficiency deterioration due to high ambient is a few per cent worse than HCFC-22, but not as severe as R-410A. Under high ambient temperatures the compressor discharge temperature can be very high, that can be solved with injection technology or wet suction control but at a >0 – 10% cost penalty to the AC, although the technology is not widely developed yet. The costs of units are equivalent to R-410A and HCFC-22 in small units. Electric components of these units are unlikely to ignite HFC-32, but initial confirmation of it requires certain cost. One major Chinese manufacturer has made an application to commercialise compact SSC units with HFC-32 in Australia. Another manufacturer has applied to introduce HFC-32 in SSC ACs in the USA.

It is also proposed to use the L-41 blend in SSC ACs, for example, where R-410A is already used. Since L-41 has low flammability, the required charge of such units if released is unlikely to reach a concentration that can be ignited (LFL). In principle the main barrier is the flammability; however, guidelines in the form of international standards do not restrict their use in this type of equipment under most situations. Currently there are no reported developments of L-41 SSC underway.

The use of single component unsaturated HFCs, such as HFC-1234yf and especially HFC-1234ze(E), have not been seriously considered for SSC ACs because their volumetric capacity is much lower than HCFC-22, which implies much bulkier systems and – along with high anticipated refrigerant price – implies a considerable increase in product cost.

4.8.2 Mini-split (non-ducted)

Residential and light commercial air-conditioning is often done with non-ducted split air conditioners. Non-ducted split ACs are widely applied in commercial buildings, schools, apartments and free-standing residences. They comprise a compressor/heat exchanger unit (condensing unit) installed outside the space to be cooled or heated. The outdoor unit is connected via refrigerant piping to a fan-coil unit located inside the conditioned space, generally on the wall but also can be ceiling or floor mounted designs. In cool and cold climates reversible ACs (heat pumps) are gaining market acceptance in some regions and are dominant in others, where they are used primarily for heating but also provide cooling during summer operation.

R-717 is never used in these systems due to limitations on its use in occupied spaces and the small capacity and installation requirements would also mean that they are not competitive.

Currently no split ACs are available using R-744, although some studies have been carried out to investigate the performance and viability of R-744 in these systems. As detailed for SSC ACs, the cooling COP at rated conditions makes R-744 seem non-competitive. However, when considering seasonal efficiency and when including for heating mode, a reversible R-744 air conditioner with up to date ejector technology (Elbel, 2011) can achieve the same seasonal efficiency as a state-of-the-art R-410A unit (Hafner, 2009). Whilst certain studies, particularly the EU Ecodesign study (ENTR Lot

6: “Air-conditioning and ventilation systems”) came to contrary conclusions, it can be seen that this is because it had not accounted for current developments on such refrigerants. Whilst the Hafner study considers current high-end product performance, the conclusions may be optimistic for lower efficiency baseline systems which are standard in some regions or pessimistic for future high efficiency levels anticipated in other regions. The cost implications for split ACs are the same as with SSC ACs using R-744, although a greater cost increment is likely due to larger motor, thicker tube and site-installed pipework. Certain parties propose that the compressors must be oversized to account for the peak temperature conditions. The barriers for split ACs are the same as with SSC ACs, although there are additional hindrances associated with installation of the piping and the necessity for technicians to be competent in handling R-744. As with SSC ACs, there are ongoing research and development activities. Due to efficiency implications, the use of cooling only R-744 systems is not really feasible but where models are developed to also provide heating, this technology is considered to be more interesting. It is possible that some commercially available products will become available in the future but only for regions where both cooling and heating is required.

HC-290 has been used in split ACs for many years on a limited scale but now with some companies developing and producing them on a larger scale. Although HC-290 seems to be the preferred HC option, HC-1270 is under evaluation by some companies to get better matching to the capacity of R-22. The HC blends are not known to be in use in new systems. In most cases, HC-290 has the same or higher COP than HCFC-22, with numerous studies reporting changes, often improvements, in COP ranging from -2% to +16% with a midrange average improvement of +7% (without capacity reduction) (Colbourne and van Gerwen, 2012). There is a discussion relating to the effect that non-optimised oils have on the larger efficiency improvements, which can of course be the case, although other work also indicates that if optimised oils with the appropriate additives are used the COP degradation can be negligible (Chen and Guo, 2011). At higher ambient temperatures even up to 52°C, the capacity and COP deterioration of HC-290 (using specific HC-290 compressors with dedicated HC-290 oils) are almost the same to that of units with R-22 from nominal operating condition (Chen, 2012). There is negligible additional cost; considering the additional cost for safe electrics and the cost savings from the use of smaller heat exchangers there can be improvements in cost effectiveness. Additional expenditure is necessary for more in-depth technician training and certain tooling. Two main barriers exist; one is that technicians require additional training in order to handle flammability issues and another is that certain safety standards impose obstructive limits on refrigerant charge sizes for certain categories, characteristics and capacity sizes of equipment, although such restrictions are rarely legal requirements.

HC-290 units are available from several companies and other manufacturers report that models will become available once production lines are completed. In particular, China has committed to converting some 18 production lines from HCFC-22 to HC-290 by 2015 and is expected to be used eventually in 70% of room AC equipment production (Zhou, 2012). Similar activities are also underway in India and several other countries. Commensurate to this, extensive research and development are continuing on safety matters and on charge size reduction. HC-290 is an attractive refrigerant for split ACs within the smaller capacity range, offering good efficiency and cost implications.

R-407C is used in a portion of split ACs, more so earlier on in the transition from HCFC-22 in non-Article 5 countries since the vapour pressure is a close match for HCFC-22. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. All other aspects are as for SSC ACs.

R-410A is used in most split ACs, where HCFC-22 is not used. The design of the system components is slightly different because of the higher operating pressure. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. All other aspects are as for SSC ACs.

Again, the L-41 blend is feasible for use in split ACs, for example, where R-410A is already used. Since L-41 has low flammability, the required charge of such units if leaked is unlikely to reach concentration that can be ignited (LFL). The efficiency is comparable to that of R-410A, although data has not found for high ambient conditions. The cost implications should be comparable to that of R-410A although marginally greater due to the refrigerant cost. In principle the main barrier is the flammability, however, guidelines in the form of international standards do not restrict their use in this type of equipment under most situations. Currently there is extensive testing and trialling ongoing and manufacturers in Japan, Korea, China and New Zealand are developing prototypes and at least one company has recently showed prototypes in exhibitions.

It is feasible to use HFC-32 in split ACs, for example, where R-410A is already used. Since HFC-32 has low flammability, the required charge of such units is unlikely to reach concentration that can be ignited (LFL) in the event of a leak.

HFC-32 has comparable efficiency to that of R-410A and HCFC-22 in many mini-split ACs. As theoretical COP, heat transfer properties and transport properties are better than R-410A, optimisation to HFC-32 is likely to result in better COP than R-410A and HCFC-22. Recently, a number of performance evaluations have been carried out on HFC-32. Barve and Cremaschi (2012) tested HFC-32 in an R-410A reversible AC, with various optimisation. In cooling mode, COP varied by 0% to -2% but with up to +8% higher capacity. In heating mode, COP was +2% to +16% with -5% to +1% change in capacity. Pham and Rajendran (2012) reported on drop-in tests with HFC-32 in an R-410A system gave about +3% higher cooling capacity with -1% lower COP and in heating mode capacity was about 4% higher with negligible change in COP. Three different R-410A ACs were tested with HFC-32 by Guo et al. (2012). The capacity increased by about +5 to +6% whilst COP was -3% to 0% lower. However, optimisation in compressor design could increase capacity and COP. As part of the AHRI "low GWP AREP" programme, HFC-32 was tested against R-410A in two reversible heat pump air conditioners (Crawford and Uselton, 2012). Depending upon the conditions, the cooling capacity ranged from -1% to +3% of R-410A with cooling COP and heating COP varying by -1% to +2% and -6% to +4%, respectively. In a subsequent report (Li and By, 2012), HFC-32 was shown to have an increased cooling capacity ranging from +2% to +4% and a COP of 1% to 2% higher.

Under high ambient temperatures the compressor discharge temperature can be very high; that can be solved by injection technology or wet suction control but at a >0 – 10% cost penalty to the AC, although the technology is not widely developed yet. Costs of units are equivalent to R-410A and HCFC-22 in small units whilst costs of larger units are equivalent to ones with R-410A, but slightly higher than HCFC-22 due to higher operating pressure. Electric components of these units are unlikely to ignite HFC-32, but initial confirmation of it is required. One Japanese company commercialised mini-split products with HFC-32 in 2012 in Japan and in 2013 in India. A few companies have recently showed prototypes in exhibitions. In conclusion HFC-32 has a high potential to penetrate this market due to its balanced property in cost, energy efficiency, and safety.

Use of the L-20 blend is feasible in split ACs, for example, where HCFC-22 or R-407C are already used. Since L-20 has low flammability, the required charge of such units is unlikely to reach concentration that can be ignited (LFL) in the event of a leak. The efficiency is comparable to that of HCFC-22, although data has not been found for high ambient conditions. The cost implications should be comparable to that of HCFC-22 and R-407C although probably greater due to the refrigerant cost. In principle the main barrier is the flammability; however, guidelines in the form of international standards do not restrict their use in this type of equipment under most situations. Currently there is extensive testing and trialling ongoing and manufacturers in Japan, Korea and China are developing prototypes.

It is also feasible to use the DR-5 blend in split ACs, for example, where R-410A is already used. Although DR-5 has low flammability, the required charge of such units is unlikely to reach concentration that can be ignited (LFL) in the event of a leak. The efficiency is comparable to that of R-410A, although data has not been found for high ambient conditions. The cost implications should be comparable to that of R-410A although somewhat greater due to the refrigerant cost.

A number of studies have been recently published on DR-5 in split systems. Leck et al (2012) tested DR-5 in a R-410A reversible split system. With an equal capacity, the cooling COP dropped by 2% but gave 4% higher COP for heating mode. In a different article, Leck (2011) tested DR-5 in four different split systems and adjusted compressor capacity to achieve the same capacity. The cooling COP varied by -2% to +4% and the heating COP by +1% to +4%. Biswas and Cremaschi (2012) tested DR-5 in an R-410A reversible AC, with various optimisation. Depending upon the condition, for cooling mode, DR-5 showed between +4% to +7% higher COP and with a capacity of up to +4% higher. In heating mode the capacity was +1 to +22% higher but with a drop in capacity of -5% to -10%.

Again, the principle barrier for A2L refrigerants (including L-20 and DR-5) is the flammability; however, guidelines in the form of international standards do not restrict their use in this type of equipment under most situations. Currently there is extensive testing and trialling ongoing and manufacturers in Japan and USA are developing prototypes. It should be noted that zeotropic blends with a notable glide can have performance degradation in reversed cycle mode due to difficulty in optimising the heat exchanger for both heating and cooling mode.

The use of single component unsaturated HFCs, such as HFC-1234yf and especially HFC-1234ze(E), have not been seriously considered for single split ACs because their volumetric capacity is much lower than HCFC-22, which implies much bulkier systems and – along with high anticipated refrigerant price – implies a considerable increase in product cost. Some exceptions may exist for niche situations in systems intended for regions with very high ambient temperatures.

4.8.3 Multi-split

A second type of non-ducted products are multi-split; essentially the same as a single split (as described in 3.6.2) but a single condensing unit may feed two or more indoor units (sometimes, up to 50). Whilst dual indoor unit models may be used for residential applications, this category of split systems is more often used in commercial buildings. As with single splits, multi-splits also offer reversible (heating) options. Variable Refrigerant Flow (VRF) systems are a sub-category of the multi-split non-ducted air conditioning systems and are distinguished from regular multi-split systems by their ability to modulate the refrigerant flow in response to the system demand. VRF systems have capacities ranging from 10 kW to over 130 kW.

R-717 is never used in these systems due to limitations on its use in occupied spaces.

There are at least two manufacturers producing multi-split ACs using R-744. However, as with other system types described before, it is preferable where at least half of the demand is for heating. The same energy efficiency considerations as for other types of air conditioners also apply for multi-splits. As with single splits, the cost implication of using R-744 in multi-splits is greater than R-744 in self-contained systems since even more site-installed pipework is required. The same barriers exist for R-744 multi-splits as with the other types of air conditioners above, however, for larger systems an additional barrier can be that the use can be restricted due to the possibility of relatively large quantities of refrigerant being leaked into small occupied spaces resulting in acute toxicity effects to occupants. Introducing advanced safety features could help overcome this. It is expected that if not already, other manufacturers will be issuing R-744 multi-split systems for heating and cooling, although these will be aimed at colder temperature climates and will not be in wide scale use. At least one manufacturer has developed a dual cooling/heating multi-split system but such systems are unsuitable for situations where the primary demand is for cooling.

Although feasible in a minute proportion of situations, HCs are not used in these systems due to charge size limitations in occupied spaces.

For R-407C and R-410A, all aspects are as with single split ACs.

In principle, it is feasible to use L-41 in multi-split systems, for example, where R-410A is already used. It is likely that the efficiency is comparable to that of R-410A, although again there is no data found for high ambient conditions. The cost implications should be comparable to that of R-410A although slightly greater due to the refrigerant cost and additional features for handling flammability. In principle the main barrier is the flammability where guidelines in the form of international standards can currently introduce some restrictions to their use in this type of equipment. However, work is underway to enable the use more accessible. Currently there are no developments of L-41 multi-splits reported.

It is feasible to use HFC-32 in most types of multi-split ACs. The pressure loss of HFC-32 is lower than HCFC-22 and R-410A due to its smaller molar mass, higher pressure, and lower required circulating mass of refrigerant so it has a greater potential to be used in such systems from an energy efficiency viewpoint. The cost should be equivalent to R-410A and slightly higher than HCFC-22 due to high operating pressure. The concerns over high discharge temperatures in high ambient temperatures are of a lesser concern in multi-split systems and compressor injection technology is less likely to have an observable cost impact. Especially if components for large multi-splits are close to the boundary to ignite, detailed tests are necessary. Since multi-split systems has the potential to release the entire charge to one of the many occupied spaces that the system serves it may generate a significant flammable cloud. However, it is proposed that the probability of rapid refrigerant release indoors is not so high so safety measures have to be established to minimise such concentrations. A risk assessment study for multi-split with A2L refrigerants is on-going in Japan. In conclusion the commercialisation of HFC-32 in this category seems to take a few years.

In principle, it is feasible to use L-20 in multi-split systems, for example, where HCFC-22 or R-407C is already used. The efficiency is comparable to that of HCFC-22 and R-407C, although data is not found for high ambient conditions. The cost implications should be comparable to that of R-407C systems although slightly greater due to the refrigerant cost and additional features for handling flammability. In principle the main barrier is the flammability where guidelines in the form of international standards can currently introduce some restrictions to their use in this type of equipment. However, work is underway to enable the use more accessible. Currently there is no development work reported for multi-splits.

In principle, it is feasible to use DR-5 in multi-split systems. Due to the characteristics being very close to those of HFC-32, the same observations can be made. Currently there is no development work reported for this type of equipment.

Again, it should be noted that zeotropic blends with a notable glide can have performance degradation in reversed cycle mode due to difficulty in optimising the heat exchanger for both heating and cooling mode.

The use of single component unsaturated HFCs, such as HFC-1234yf and especially HFC-1234ze(E), have not been seriously considered for multi split ACs because their volumetric capacity is much lower than HCFC-22, which implies much bulkier systems and – along with high anticipated refrigerant price – implies a considerable increase in product cost.

4.8.4 Split (ducted)

Ducted, split residential ACs are typically used where central forced-air heating systems necessitate the installation of a duct system that supplies air to each room of a residence or small zones within commercial or institutional buildings. A condensing unit (compressor/heat exchanger), placed outside the conditioned space, supplies refrigerant to one or more indoor coils (heat exchangers) installed within the duct system or air handler. Air in the conditioned space is cooled or heated by passing over the coil and is distributed to the conditioned spaces by the duct system. Systems can in principle be designed as reversible types, although for this category of ducted air conditioners it is done less frequently. Capacities range from 5 kW to 17.5 kW.

R-717 is never used in these systems due to limitations on its use in occupied spaces and the small capacity and installation requirements would also mean that they are not competitive.

With R-744 the issues in ducted split systems are similar to those of single and multi-split systems.

Although feasible in a small proportion of situations, HCs are not currently used in these systems due to charge size limitations in occupied spaces.

For R-407C and R-410A, all aspects are as with split ACs.

As regards HFC-32, the L-20, the L-41 and the DR-5 blends, their application in ducted splits is feasible and comparable to that of multi-splits although flammability implications apply. In particular a typical installation of ducted split includes small closet, attic, and such, so the rapid release can generate flammable concentration in a small space. Therefore special design features must be considered and are currently under development under IEC. Risk assessment studies have been carried out in the USA. The commercialisation of HFC-32 and the L-41 blend in this category is likely to take a few years. Currently there is testing and trialling ongoing and manufacturers in Japan, Korea and China are developing prototypes for all of these substances.

The use of single component unsaturated HFCs, such as HFC-1234yf and especially HFC-1234ze(E), have not been seriously considered for ducted split ACs because their volumetric capacity is much lower than HCFC-22, which implies much bulkier systems and – along with high anticipated refrigerant price – implies a considerable increase in product cost.

4.8.5 Ducted split commercial and non-split air conditioners

Ducted commercial ACs and heat pumps are manufactured in two forms: split system units which are matched with an indoor air handler/heat exchanger assembly and single packaged units which contain an integral fan and heat exchanger assembly which is connected by means of ducting to the air distribution system of the commercial structure. The majority of ducted commercial packaged ACs and heat pumps are mounted on the roof or outside on the ground of offices, shops, restaurants or institutional facilities. Multiple units containing one or more compressors are often used to condition the enclosed space of low-rise shopping centres, shops, schools or other moderate size commercial structures. Commercial ducted systems are offered in a wide range of capacities from around 10 kW to over 100 kW.

R-717 is never used in these systems due to limitations on its use in occupied spaces and the small capacity and installation requirements would also mean that they are not competitive

There are several companies within Europe that produce R-744 split ducted and rooftop systems, with a wide capacity range. As with other R-744 air conditioners, the efficiency at higher ambient temperatures of non-enhanced R-744 systems tends to be reduced, although when systems are operated at lower ambient temperatures the efficiency is competitive with HCFC-22 and similar refrigerants. The cost effectiveness is similar for other types of R-744 air conditioners.

Although feasible in a small proportion of situations, HCs are not widely used in direct systems due to charge size limitations in occupied spaces, although at least two companies are trialling systems.

For R-407C and R-410A, all aspects are as with split ACs. The application of HFC-32, the L-20, L-41 or DR-5 blend in commercial ducted and rooftop systems is feasible and most of the issues are essentially the same as for ducted splits. The exception is that commercial units are not often installed in small utility closets as is found in the residential sector. Leck (2011) reported on tests of two different ducted split systems. The cooling capacity was -5% and +3%, both with an increase in 1% in COP. Heating capacity was +2% and -2%, both with a -2% change in heating COP.

The use of single component unsaturated HFCs, such as HFC-1234yf and especially HFC-1234ze(E), have not been seriously considered for commercial ducted split ACs because their volumetric capacity is much lower than HCFC-22, which implies much bulkier systems and – along with high anticipated refrigerant price – implies a considerable increase in product cost. Some exceptions may exist for niche situations in systems intended for regions with very high ambient temperatures.

4.8.6 Hot water heating heat pumps

These are a category of heat pumps designed to heat domestic and other service hot water to temperatures between 55 and 90 °C. These operating temperatures must be considered when selecting the refrigerant. A HPWH consists of a water storage tank and a heat pump water heating unit and in some designs an additional heat exchanger. In the heat pump unit, water supplied from the storage tank or directly from the mains water supply is heated by the condenser (or, for transcritical cycles the gas cooler) and then returned to the storage tank. Stored hot water is supplied to each tapping point, in response to the demand. In order to obtain high water temperatures at low outdoor ambient temperatures, air to water heat pump systems can utilise a cascade refrigerating system with two different refrigerants.

R-717 is used fairly widely in capacities from 250 kW to very large/industrial-scale (>1 MW) heat pumps (although this is thought to be a small market). Such systems are located outside or in special machinery rooms in order to handle the higher toxicity characteristics but also due to sound reduction. Yearly service and maintenance requirement demands the room to be accessible for qualified technicians and engineers. Systems are often used for district heating and cooling systems but also for process heating and cooling. The efficiency of R-717 heat pumps is known to be very good (Stene, 2008), particularly since the critical point is very high compared to most other refrigerants. The cost effectiveness becomes favourable as the heating capacity approaches 250 kW, relative to HCFC-22.
As with R-717 systems in general, the main barriers are related to the minimal capacity required for cost-effectiveness and certain national regulation controlling installation. Also the perceived danger, true or not, is a barrier. Within Europe and North America, there is an increasing tendency to use R-717 heat pumps, especially in industrial plants that are already familiar with R-717, although this is also commensurate with the increase in the use of heat pump technology anyway. For large commercial and industrial applications, R-717 is generally an attractive option and (neglecting national regulations) can normally be applied in most situations. The use of heat pumps is more restricted by subsidies to the energy sector than by the technology. In many countries the electricity is too expensive compared to cheap subsidised fossil fuels.

Due to the high discharge superheat of R-744 and heat rejection at gliding temperatures, it provides a particular advantage when being used for hot water heating from low temperature water. As such a large number of manufacturers globally are producing domestic and small commercial sized hot water heating heat pumps using R-744. The energy efficiency is high, highly affected by the design of the water storage side. Enhancement technologies like ejectors are commonly used to further improve energy efficiency of these heat pump systems. If the cold side is applied for AC during hot water production, very high total COPs are achieved. Generally, the efficiency that can be achieved by R-744 in hot water heaters is much higher (for example COP = 4.3) than that of other refrigerants (for example COP = 4.0) and therefore it is difficult to make a cost-effectiveness comparison. The main barrier is the cost relative to that of conventional fossil fuel boilers. Hourly electricity rate supports R-744 heat pumps implemented in Smart–grids, so that heat is produced when electricity is cheap. Continued growth for R-744 hot water heaters, particularly in Asia is expected and to some extent in Europe. It is evident that R-744 is one of the most suitable alternatives for these types of heat pumps.

Although HCs are viable alternatives for use in hot water heat pumps, they are not in common use but examples can be found. For instance, a new heat pump water heater model has recently been put on the market by a French company which delivers high energy efficiency using HC-600a with a small charge and larger systems using HC-290 by a company in Australia.

For R-407C and R-410A, all aspects are as with split ACs. R-410A is commonly used in such systems in both Article 5 and non-Article 5 countries. HFC-134a is also used in such systems, although due to its lower pressure the systems are less compact and as such incur higher costs.

It is feasible to use HFC-32 in hot water heat pumps, for example, where R-410A is already used. The flammability and cost implications associated with the use of HFC-32 in this application are similar to that of single split systems. The theoretical cycle efficiency is better than R-410A, but slightly less than HCFC-22, whilst the pressure is 1.5 times higher than HCFC-22 and equivalent to R-410A. Discharge temperature is higher at high pressure ratio operation, so application in this category requires more rapid and accurate control of temperatures. It is not known whether any manufacturers are developing HFC-32 based hot water heat pumps commercially.

It is feasible to use the L-20 blend in hot water heat pumps, for example, where HCFC-22 is already used. The flammability implications are the same as with HFC-32.

HFC-1234ze(E) can also be used in HWHPs that can be used in existing HFC-134a technologies with minor modifications (compressor sizing). Due to its lower flammability classification, the safety implications are comparable to those of HFC-32 and L-20 blend applications. Otherwise the application characteristics are close to HFC-134a except that greater incremental costs would be incurred as a result of less compact systems (due to lower pressure) and higher refrigerant price. No information about real performance or whether any manufacturers are developing systems using this option was found.

N-13 is a refrigerant blend that can be used in existing HFC-134a technologies with minor modifications (compressor sizing). The various implications with using this blend would be the same as those with HFC-1234ze(E) except that the flammability issues would not apply. No information about real performance or whether any manufacturers are developing systems using this option was found.

4.8.7 Space heating heat pumps

This type of comfort heating heats the room by heating water for distribution to an air handling unit, radiator or under floor panel; they are used in domestic, commercial and industrial situations. The required water temperature depend on the types of emitter, low temperature application ranging from 25 to 35 °C for under floor heating, for moderate temperature application such as air handling units around 45 °C, for high temperature application such as radiant heating 55 to 60 °C, and for very high temperature application, as high as 65 to 80 °C, such as for the fossil fuel boiler replacement market.

The required warm water temperature affects the selection of refrigerant. Heat pump systems are more efficient at lower sink temperatures, but each product must fulfil the required operating temperature.

R-717 is used fairly widely in systems from 250 kW up to very large/industrial-scale (>1 MW) heat pumps. Such systems are located outside or in special machinery rooms in order to handle the higher toxicity characteristics and giving the necessary space around the system and giving some sound reduction. Systems are normally designed with hot water heating function. The efficiency of R-717 heat pumps is known to be very good (Stene, 2008). The cost effectiveness becomes favourable as the heating capacity approaches 250 kW, relative to HCFC-22. The return on investment of less than 2 years has been reported. As with R-717 systems in general, the main barriers are related to the minimal capacity required for cost-effectiveness and certain national regulation controlling installation. Within Europe and North America, there is an increasing tendency to use R-717 heat pumps, although this is also commensurate with the increase in the use of heat pump technology anyway. For large commercial and industrial applications, R-717 is generally an attractive option and can normally be applied in most situations where national or local regulations can be met. The use of R-717 heat pumps for district heating is also becoming more popular.

R-744 is used in space heating heat pumps, but not as widespread as it is for hot water heating. This is mainly due to the efficiency advantages over HFC refrigerants declining as the output water temperature lowers. However, numerous manufacturers are producing such systems, although mainly in combination with hot water heating systems where dual temperature levels are needed. The relative efficiency of R-744 space heating heat pumps is sensitive to many design considerations, but in general, where the supply air temperature is above 40°C, R-744 provides efficiency benefits (Richter et al, 2001). This is particularly of interest in systems that, for example, utilise radiators (Khoury, 2012). However, R-744 heat pumps can operate at very low ambient temperatures with acceptable COPs. Water-to-water or air-to-water systems, which are factory sealed arrangements, can be comparatively compact, although generally one and a half times heavier than those using conventional refrigerants. The addition of certain components needed to improve efficiency can result in additional cost compared to conventional HCFC-22 systems. Whilst the market penetration is low, the main barrier is cost. However, it is anticipated that as more products enter the market such heat pumps (Smart Grid applicable) will become more competitive. Within Asia and Europe more manufacturers are producing space water and dual temperature level heat pumps using R-744 and it is expected that this trend will continue. The use of R-744 in space heating heat pumps is less straight forwards than for hot water heating, but as the technology develops efficiencies are becoming more competitive and more products are entering the market. Over time the minimum COPs are likely to increase, however, simultaneously technological developments can also be seen to raise COP.
R744 is also being used in industrial sized heat pumps, including for hot water, district heating and industrial drying processes.

The share of heat demanded for hot water and space heating also plays a decisive role in determining competitive options. According to simulation results of R-744-heat pumps in low energy houses in Norway (in the context of the IEA Heat Pump Centre project on the "economical heating and cooling systems for low energy houses"), R-744 heat pumps for combined space heating and domestic hot water outperforms a conventional (HFC) heat pump if the share of domestic hot water is at least 60%. Using improved R-744 compressor and ejector technology the break-even point is shifted to a domestic hot water share of 50% (Annex32). Moreover, with the trend towards "near Zero Energy" buildings that have minimal needs for space heating, hot water heating is expected to account for most of the heat demand in future new buildings.

Historically, HCs, particularly HC-290, had been used widely in Europe for small (domestic) heat pumps, although the introduction of the EU Pressure Equipment Directive resulted in a decline in its use due to compressor availability. However, in principle their continued use is not otherwise limited and now a number of manufacturers have products on the market. Such systems are located outside or in special ventilated enclosures. In addition, there are also large commercial-sized heat pumps using HC-290 and HC-1270 being sold within Europe. The HC blends are not known to be currently in use. The efficiency of HC-290 and HC-1270 in space heating heat pumps is known to be very good (Palm, 2005). The cost effectiveness in general is favourable, although sensitive to the design of safety features. As with the use of HCs in general, the main barriers are related to the safety guidelines. For systems with parts which are located in occupied spaces, the charge size can be prohibitively limited, whereas for systems locate outside or in ventilated enclosures there are no major restrictions. Again, it is necessary to ensure that technicians are appropriately trained to handle flammability. Within Europe there is steady use of HCs in heat pumps, with an increase for commercial sized systems. Similarly, research and development is also continuing. In conclusion for small and commercial sized applications, HCs are viable alternatives for space heating heat pumps.

Both R-407C and R-410A are widely used in these heat pumps. All aspects apply as with split ACs.

It is feasible to use HFC-32 and the L-20 blend in space heating heat pumps, as with hot water heat pumps. Their efficiency implications are comparable and the cost implications similar to those of hot water heat pumps. If refrigerant water heat exchanger is located in outside occupancy, the safety issue is easier to solve. It is not known whether any manufacturers are developing HFC-32 or L-20 hot water heat pumps commercially.

4.9 Chillers

Comfort air conditioning in large commercial buildings and building complexes (including hotels, offices, hospitals, universities, and other central systems) is provided by chillers in most cases. They cool water or other heat transfer fluid (such as a water-antifreeze mixture) that is pumped through heat exchangers in air handlers or fan-coil units for cooling and dehumidifying the air. Chillers also are used for process cooling in commercial and industrial facilities such as data processing and communication centres, electronics fabrication, precision machining, and moulding. District cooling is another application that provides air conditioning to multiple buildings through a large chilled water distribution system, as opposed to air conditioning each building with separate systems. Chiller operation is driven by cooling requirements but provision for heat recovery may be included. The principal components of a vapour-compression chiller are one or more compressors driven by electric motors (or less commonly, engines or turbines using open drive compressors), a liquid cooler (evaporator), a condenser, a refrigerant, a lubrication system, a refrigerant expansion and flow control device, a power handling device (commonly a starter or variable speed electronic drive), and a control and protection unit. The complete chiller usually is factory assembled and tested; no connection between refrigerant-containing parts is required on site by the installer except for very large chillers which may be shipped as multiple assemblies. Installation is accomplished by connection to water, power, and control systems. Vapour-compression chillers are identified by the type of compressor they employ; centrifugal or positive displacement compressors. Chillers can be further divided according to their condenser heat exchanger type, the most common being water-cooled or air-cooled and less common are evaporatively-cooled condensers and dry coolers.

4.9.1 Positive displacement chillers

Positive displacement chillers include those with reciprocating piston, screw, and scroll compressors. Smaller capacity models tends to be air cooled, which accounts for the majority of chillers, but as the capacity increases above around 350 kW water-cooled models become more frequent. Capacities can exceed several MWs.

R-717 is used fairly widely in reciprocating and screw chillers for process refrigeration, food storage facilities and air conditioning. Chillers must be located outside or in special machinery rooms in order to handle the higher toxicity and flammability characteristics. The sound levels from this kind of high capacity systems also require a sound limiting room. This type of chillers has been widely used in airports and similar high capacity areas. The efficiency of R-717 is high for chillers in both medium and high temperature applications (RTOC, 2010). The cost effectiveness becomes favourable as the cooling capacity approaches 200 kW and up to about 6 MW, relative to HCFC-22. The barriers for chillers are consistent with R-717 systems in general. However R-717 is more accepted in industrial and large capacity systems. The regulations have been successfully in place for many years. However, there are concerns of possible changes to certain standards. Within Europe and North America, there is an increasing tendency to use R-717 chillers, although the total number is still small compared to HCFC-22 and HFC machines.

For large commercial and industrial applications, R-717 is generally an attractive option and can normally be applied in most situations provided national and local regulations can be met.

R-744 is now used in reciprocating chillers by many different manufacturers. The capacities range to up to several hundred kW and cover both air conditioning and refrigeration applications. As with other types of systems, the efficiency is compromised with increasing ambient temperatures. As such water-cooled chillers are of more interest in countries with hotter climates. However, where chillers are also used for heating purposes, seasonal efficiency benefits can be achieved. With knowledge in thermodynamics and system understanding, new concepts are under development, which are more energy efficient compared to current HCFC and HFC systems. The cost of small capacity R-744 chillers is higher than that of HCFC-22 systems due to the piping and component design necessary to handle higher pressures, however, at capacities of around several hundred kW the relative cost approaches parity. Consistent with other applications, the main barrier for R-744 chillers is the poorer efficiency in climates with consistently higher ambient temperatures. At least within Europe, there is an increase in the output of R-744 positive displacement chillers. R-744 chillers are widely available and are increasingly being used for both air conditioning and refrigeration applications. However, due to efficiency constraints their use is preferred for cooler climates.

Both HC-290 and HC-1270 are produced by a number of manufacturers in Europe and some countries in other regions. Historically they have been used widely in petro-chemical industry but are now being applied for air conditioning, food storage and process refrigeration. The majority of chillers are reciprocating and screw type and cover a capacity range of 40 kW to over 1 MW. The various HC blends appear not to be currently used in chillers. The efficiency of HC-290 and HC-1270 is the same or greater than HCFC-22 in both medium and high temperature applications. Most manufacturers report that their HC models have higher COP than their equivalent HCFC/HFC models. Generally the cost implications of applying HCs in chillers are negligible, although the incremental cost depends on how safety measures are handled. Two Danish companies report investment costs for their HC chillers to be 5-6% higher compared to the HFC reference system as a result of higher cost of the production line and the safety features for the units. However during operation, the efficiency of HC-290 is 10% better than efficiency of current HFC systems according to another source (Pedersen, 2012).

There are certain barriers with HCs, depending upon the chiller configuration. For air-cooled or water-cooled chillers that are positioned in the open air (within certain separation distances), there are no significant hindrances. For systems installed in machinery rooms, electrical equipment must be suitable for hazardous areas and gas detection with emergency ventilation is required (although in fact this should be applied to any refrigerant). The main barrier is that unless properly designed with additional safety measures, HC chillers cannot be used below ground level (such as in cellars). In addition, technicians must be suitably trained. At least within Europe and some other regions, there is an increasing tendency to use HCs in chillers, although the total number is still small compared to HCFC-22 and HFC machines. For commercial and industrial applications, HCs are generally a viable, efficient cost effective alternative except for situations that require installation below ground level.

HFC-1234ze(E) is suitable for chillers and has been trialled in systems in Europe. When used in with reciprocating, scroll or screw type of compressors, this refrigerant produces efficiency levels comparable to HFC-134a. HFC-1234ze(E) was included in the testing of the AHRI "low GWP AREP" scheme (Schultz and Kujak, 2013a); whilst the COP was +2% higher than HFC-134a, the cooling capacity dropped by around -25%. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used. For screw compressors, the same type of oil (POE) can be used but the viscosity grade should be verified with the equipment manufacturer. Although HFC-1234ze(E) is a low flammability refrigerant, there are guidelines and standards available which provide guidance on safe installation, at least for outdoor locations. HFC-1234ze(E) is a refrigerant that can be used in existing HFC-134a technologies with minor modifications (compressor sizing). Due to its high critical temperature, it will perform very well in warm climates.

Both R-407C and R-410A are widely used in positive displacement chillers and all aspects are as with split and other types of ACs and heat pumps.

HFC-134a is used widely in various capacity reciprocating, scroll and screw chillers. The design of the system components is slightly different from HCFC-22 (and R-407C and R-410A) because of the lower operating pressure. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. The energy efficiency is similar to that of HCFC-22, although higher COPs can be achieved if the system is carefully designed. Generally systems are marginally more costly than HCFC-22 because they are less compact. Since HFC-134a is well established, it is evident that there are no significant barriers to its use. Currently, HFC-134a use in chillers is neither declining nor increasing significantly.

The L-20 blend is a replacement for HCFC-22 or R-407C in positive displacement chillers that employ reciprocating or scroll compressor technologies. No major modifications are needed as its pressures are similar to HCFC-22 and R-407C. Although L-20 is a low flammability refrigerant, there are guidelines and standards available which provide guidance on safe installation. These are the same as those for the flammability aspects of R-717 for both chiller design and machinery room requirements. Under the AHRI "low GWP AREP" programme, L-20 was compared against HCFC-22 in an air-cooled chiller, which showed that with no change in capacity, there was a -5% change in cooling COP (Schultz and Kujak, 2012b). It is not known whether any manufacturers are developing equipment with this refrigerant.

The N-13 blend is feasible for use in positive displacement chillers and can be used in existing HFC-134a technologies with minor modifications (compressor sizing). When used with reciprocating, scroll or screw type of compressors, this refrigerant produces efficiency levels comparable to HFC-134a. The AHRI "low GWP AREP" scheme tested N-13 and XP-10 in an HFC-134a chiller (Schultz and Kujak, 2013a), which showed the cooling capacity fell by -12% with a drop in COP of -5%. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used. For screw compressors, the same type of oil (POE) can be used but the viscosity grade should be verified with the equipment manufacturer. Due to its high critical temperature, it will perform very well in warm climates. Testing and trials are being carried out in reciprocating and screw chillers and prototypes are under development by manufacturers in Europe and the USA.

The XP-10 blend is feasible for use in positive displacement chillers as is the N-13 blend in systems based on HFC-134a architecture with only minor modifications (primarily compressor sizing). When used in with reciprocating or scroll compressors, this refrigerant produces efficiency levels comparable to HFC-134a. The AHRI "low GWP AREP" scheme tested XP-10 in an HFC-134a chiller (Schultz and Kujak, 2013a), where there was no change in capacity but a -4% lower COP. When used in scroll and reciprocating compressors, the same POE lubricant oil can be used. It is not known what the real performance implications are relative to HFC-134a chiller and similarly it is not known whether any manufacturers are developing equipment with this refrigerant.

It is feasible to use HFC-32 in positive displacement chillers, for example, where R-410A is already used, provided that the flammability characteristics are handled appropriately. The energy efficiency is equivalent or slightly better than HCFC-22 and R-410A due to its better heat transfer properties. HFC-32 was included in the AHRI "low GWP AREP" testing (Schultz and Kujak, 2012) and gave a +8% higher cooling capacity and -1% to -2% lower COP than R-410A. Larger capacity per compressor swept volume is beneficial for chiller with large scroll compressors. On the contrary, it is disadvantage for ones with small screw compressors. Better heat transfer properties are beneficial for chillers as they are limiting factor in water heat exchangers. Lower pressure drop in air cooled heat exchanger is a merit of HFC-32 for large air cooled chillers. Flammability requirements for machinery rooms are comparable to those for R-717. Electric switching components for large chillers have potential to ignite HFC-32, but ventilation in machinery room is mandatory to prevent flammable concentration. So, requirements for such switching components are not established for A2L specifically. A risk assessment study for chillers with A2L refrigerants is on-going in Japan. HFC-32 may be employed for small chillers, but large ones will probably employ the HFC-1234 series substance mainly.

4.9.2 Centrifugal chillers

These are chillers, which employ centrifugal compressors with one, two, and three compression stages. They are generally used for air conditioning applications in very large buildings and for district cooling. Centrifugal compressors most commonly are used in water cooled systems, especially those with capacities exceeding 1 MW. Air cooled centrifugal chillers are less common. These chillers operate by using the momentum of a molecule to increase pressure. A simplified description would be that, the lighter the molecule, the higher the chiller speed has to be. Natural substances, lacking the relatively heavy halogens in their structure, thus tend to require a more complex rotor (higher speed, diameter, more stages) than halogenated substances. Consequently, their use so far has been limited.

R-717 is seldom used in centrifugal chillers, although products are available and installed for certain applications. R-744 is not currently used in centrifugal chillers.

HCs are used to a limited extent in centrifugal chillers typically within certain petro-chemical industries where hazardous area protection is already in common use. However, they are not generally considered as alternatives for replacement of HCFC based centrifugal chillers. R-718 (water) chillers are in use in several installations in Europe and a consortium of companies recently developed a new centrifugal compressor, which may outperform HFC-134a.

Where it concerns HFC-1234ze(E) use in centrifugal compressors, this refrigerant is expected to produce efficiency levels slightly better than HFC-134a. Since most of these chillers are located outside, the safety concerns are minor, but nevertheless, the same as for positive displacement chillers. Due to its high critical temperature, they are expected to perform very well in warm climates. Reportedly, there are already several chillers using this refrigerant currently in operation.

HCFC-1233zd(E) (a low-GWP HCFC) can replace HCFC-123 in low pressure centrifugal chillers. When used in centrifugal compressors, this refrigerant is expected to produce efficiency levels slightly better than HCFC-123, allowing the design of systems with high energy efficiency. As a new molecule, this refrigerant has a higher cost than HCFC-123. Still this cost would be moderate and will have a reasonable payback period due to the high energy efficiency of the refrigerant which lowers the expenses for end users. This refrigerant is currently under evaluation by manufacturers.

HFC-134a is used widely in various capacities of centrifugal chillers. The design of the system components is fairly different from HCFC-123 because of the higher operating pressure and smaller molar mass. Because it is a class A1 refrigerant (lower toxicity, non-flammable) there are no significant safety implications concerning its use. The energy efficiency is marginally lower than that of HCFC-123. Generally, systems require significant design changes to cope with the higher pressure of HFC-134a than HCFC-123. Since HFC-134a is well established, it is evident that there are no significant barriers to its use. Currently, the HFC-134a use in chillers is neither declining nor increasing significantly.

It is not practical to use HFC-410A and HFC-32 in centrifugal chillers. The thermal conductivity is basically better than R-134a, but due to high internal leak flow and high pressure difference with smaller molar mass, the compressor efficiency is not as high as one with HFC-134a or other low pressure refrigerants such as HFC-1234ze. In addition, boiling volume is not as high as HFC-134a and HFC-1234ze, so use of HFC-410A and HFC-32 will result in a larger evaporator. Consequently, the use of high pressure HFCs is very limited and negligible in general centrifugal chillers.

4.10 Mobile air conditioning

Cars and truck cabins used the same refrigerant CFC-12 from the 50's to 1992; it was then replaced by HFC-134a, which is still in use everywhere, even with the European ban that should have begun in 2011 for "new model" cars. Dependent on the country, the preferred option is to keep going with HFC-134a or to shift to HFC-1234yf. The uptake of HFC-134a replacement refrigerants did not occur as expected, neither for HFC-1234yf nor for CO_2; part of the reason was the allowance of the EU considering new model approvals as "old model" type ones.

For city or long haul buses and also train cabins, choices have always been somewhat more open. They were CFC-12 and HCFC-22, followed later by HFC-134a and R-407C. In Germany, some buses are operated on R-744 and the alternative air cycle (Brayton-Joule) technology has been installed on more than 100 ICE trains.

4.10.1 Cars

The car industry has organised its global production (being more than 60 million vehicles in 2012) with a high level of specialisation. Air-conditioning systems are supplied by tier 1 suppliers that manufacture the complete AC system: heating, cooling and ventilation, as well as the control system. The car companies are interested in a strong competition among their suppliers and the consequence is that the best refrigerant should be a single, unique, and global one. From the carmaker point of view, the refrigerant has to be a commodity in terms of availability and costs. History shows that HFC-134a has been the only refrigerant chosen by all car companies to replace CFC-12, and until recently the expectation was that there will again be a single refrigerant world-wide.

As previously stated, R-744 equipment has seen a number of developments from 2000 to 2010 and several manufacturers reportedly reached "implementation readiness". Tier 1 suppliers as well as car makers have developed several technical options with R-744: internal heat exchangers, external control compressors, micro-channel gas coolers, and evaporators dedicated to R-744. New hoses with ultra-low permeation have also been developed. The interest in and development of R-744 in this sub-sector declined significantly around 2009-2010, as car manufacturers and suppliers concentrated their efforts on HFC-1234yf. In 2013 there has been a renewed interest in R-744 MACs, with several German OEMs announcing their intention to develop such systems (see e.g. www.R744.com, 2013) and some of which stating their preference to stay with HFC-134a until R-744 will have been commercialised. However, to date no global OEM has installed R-744 for automotive air-conditioning,

A number of tests have been performed in hot and cold climates. R-744 has been demonstrated to be similar in efficiency as best in class HFC-134a systems for some experimental fleet vehicles, except when the vehicle is idling and also under high temperature conditions (above 35°C)

The main barriers for R-744 systems have been issues such as costs, reliability and servicing aspects. Even for a series of at least 150,000 R-744 AC systems per year, costs would at least double compared to the baseline, according to Tier 1 suppliers (in the year 2010). The CO_2 option not being a global one, requires two AC systems (one for R-744, another one for HFC-134a) to be mounted on the same assembly line. Two other barrier issues were related to reliability and servicing:

- the shaft of the open-type compressor was a highly potential leak-prone component with no lessons learned at large scale,
- R-744 servicing requires special training and also specific equipment making it necessary to develop a new world-wide servicing network for global car companies.

For electric cars or hybrid cars, available high voltage hermetic compressors can be used. Consequently, the shaft seal issue would disappear, which makes the R-744 MAC system a reliable one. Nevertheless, the cost issue for this type of system remains. In summary, R-744 is technically difficult to operate and creates a barrier in finding enough technical offers from the Tier 1 suppliers; only the best in class Tier 1 companies have been able to develop efficient R-744 compressors.

Hydrocarbons are efficient refrigerants and, like other refrigerants, have to be chosen according to their condensing and evaporating pressures. Safety concerns are a clear and strong barrier against the use of HCs in cars. During the competition between R-744 and HFC-152a, HFC-152a received a very strong opposition from the German car makers that are vehemently against any use of flammable refrigerants in cars.

The sales of HC blends for car AC systems for the aftermarket will continue in some countries, but this does not constitute a global trend and will not receive the support of any carmaker. In conclusion, HCs are not a global option for car AC systems.

Because of the flammability issue, two low-GWP non-flammable blends “Blend H” and “DP-1” have been proposed by chemical manufacturers in 2003. Blend-H failed for reason of decomposition issues and DP-1 failed due to the toxicity of one of its component. Additionally, as of 2011, other blends have been proposed, in particular AC-5 and AC-6, which are currently being evaluated by an SAE International Cooperative Research Program.

HFC-1234yf with its low GWP of 1 is seen as the global solution for the car industry medium-sized manufacturing plant has started operation and is supplying some models built primarily in Europe, Japan, and the United States. However, if HFC-1234yf is to be a global solution for the entire industry, additional production capacity will be needed. HFC-1234yf is now being implemented in several models, especially in Europe, where the regulation requires refrigerants with a GWP < 150 for new model cars since 2011, although enforcement of the requirement was delayed until 2013 while chemical production capacity was being installed. The change from HFC-134a to HFC-1234yf seems to be one of the likely options because the car industry favours global options for AC systems. The preference of companies outside Germany would be to change to HFC-1234yf. It is also supported by LCCP analysis, which shows that HFC-1234yf would be superior to R-744 for most ambient temperatures. It can be mentioned that HFC-1234yf is currently available to some extent and the first cars using this refrigerant are therefore in production now. Even though slightly flammable, its thermodynamic properties are very close to those of HFC-134a and so the adaptation is easy without significant constraints due to its very low flammability. German car manufacturers in 2012 raised again the issue of HFC-1234yf flammability and postponed its introduction in their assembly lines, until a separate safety assessment would have been conducted. Since then, two separate studies have been completed. Another Cooperative Research Program by the SAE confirmed previous conclusions that HFC-1234yf could be used safely for automotive air conditioning. Germany's motor vehicle department KBA concluded that while HFC-1234yf was inherently more dangerous than HFC-134a in severe conditions, it could be applied safely.

Many tests have been performed on HFC-1234yf and some adaptations on the suction line diameter and on the heat-exchanger tuning have been done in order to match HFC-134a energy performances. Developments have been made and no significant differences are measured compared to the best in class HFC-134a systems. The cost of the chemical is announced to be 5 to 7 times more than that of HFC-134a, but it is known that, in the chemical industries, prices could vary from 1 to 10 depending on the sales volume. One OEM implementing this refrigerant stated that the total cost of the system, including the chemical and other components, was $75 more than an HFC-134a system.

The mass-production of HFC-1234yf has being delayed up to the beginning of 2014 based on current information. Due to the slow uptake of HFC-1234yf, even in Europe, HFC-134a is currently charged in most new AC systems. HFC-134a AC systems are the bench mark technology for all alternatives. The cost is also the reference for mass produced AC systems with a strong competition among Tier 1 suppliers. Obviously the only barrier is its GWP. It is likely that HFC-134a will be replaced under different schedules in the various world regions.

4.10.2 Public transport

AC systems of both trains and buses are similar and are produced in small series of some hundreds per year. The cooling capacities vary from 10 to 35 kW depending on the size of the bus or the train car. Due to the small market of this application, technologies in use are coming from stationary air-conditioning industry for heat exchangers. For buses, compressors are open-type compressors driven by the engine as for the car AC system. For trains, compressors are electrically-driven hermetic compressors. The refrigerant choice could therefore be different for those applications.

Carbon dioxide has been developed in Germany since 1996 by one company and the total fleet is about 50 city buses. In moderate climates, R-744 performs well and lessons learned from several years of experiences do not show significant troubleshooting. Another German manufacturer proposes and sells R-744 based AC systems for trains. The energy efficiency under German climate conditions appears to be in the same range as for the reference refrigerant HFC-134a. For high ambient conditions, the energy efficiency is lower at equal design efforts. The main barrier is related to costs, design habits and also the required sophisticated designs for hot climates. R-744 systems as developed for refrigerated transport by companies also manufacturing the “usual” HFC based AC systems for buses and trains, may trigger the change to R-744 systems for buses and trains.

In conclusion, AC systems for buses and trains are a niche application. New developments with R-744 will be a consequence of developments in larger market application and regulatory constraints.

HCs are not applicable in trains and buses due to safety issues for public transportation.

The HFC-1234yf development for car AC systems will have direct consequences for bus and train AC systems currently operated on HFC-134a. The shift can be done, based on first lessons learned in the car industry. For train AC systems, the use of R-407C or the use of new blends containing the chemicals HFC-1234yf or HFC-1234ze could be proposed in the near future.

As mentioned for car AC systems, the energy efficiency can be as good as the reference line with HFC-134a, based on simple adaptations taking into account thermodynamic properties of HFC-1234yf. The refrigerant cost, although greater than the usual price, is not a strong barrier, because its cost represents less than 1% of the total cost of those AC systems. The current barrier is related to the fact that no current regulation constraints exist. The change from HFC-134a to HFC-1234yf is a relatively easy option, as well as the possible shift from R-407C to new low GWP blends.

Air systems based on the reverse Brayton-Joule cycle with air compressors and turbines are the standard system for airplane AC systems. The difference between airplanes and trains is the outdoor temperatures (-50°C for airplanes). The efficiency of air systems is relatively poor and intrinsically lower compared to vapour compression systems. For high ambient temperatures, the cooling capacity is decreasing rapidly. For moderate climates, air systems are possible. The advantage is the absence of refrigerant; the drawback is the limited cooling capacity for high ambient temperatures.

Currently, the two dominant refrigerants are HFC-134a and R-407C in developed countries and HFC-134a and HCFC-22 in developing countries. R-407C is often chosen for train cars, due to the inherent compactness of the AC system to be integrated in the roof of the train car. Barriers are based on the GWP of those refrigerants, even if those applications could be exempted of using low-GWP refrigerants for another couple of years in Europe. Within the next 10 years, R-407C is expected to be replaced by all the different alternatives previously mentioned.

While the current HFCs could be used for a long period in train and bus niche applications, the shift from these high-GWP refrigerants to alternatives will be related to the overall developments in stationary AC systems.

5 Foams

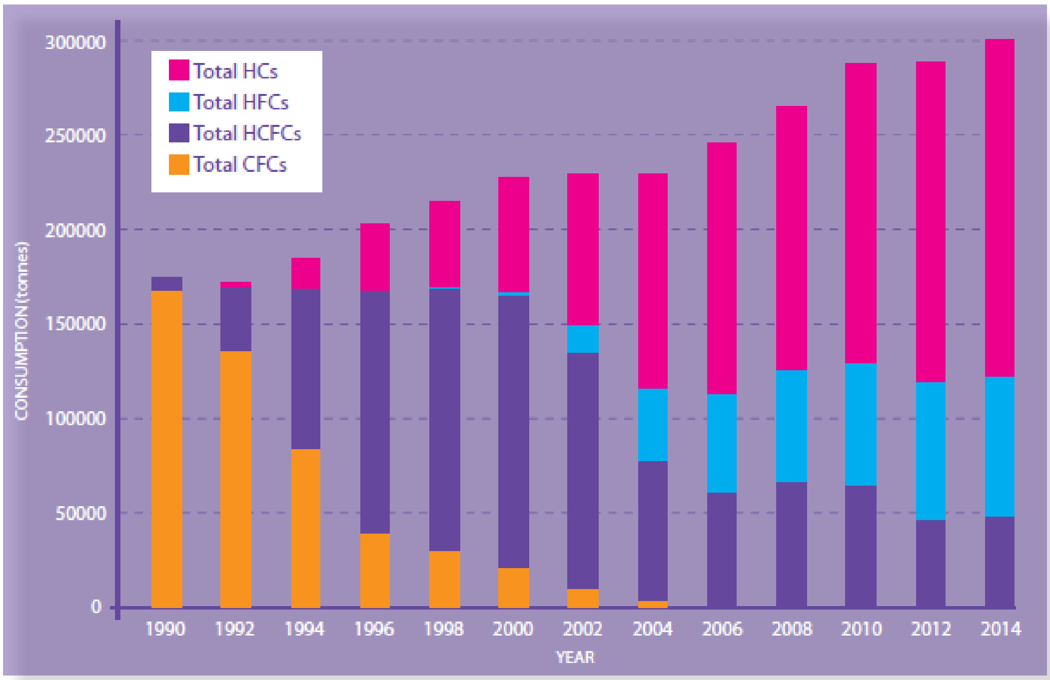
5.1 ODS alternatives

The foam sector has made significant strides in addressing the phase-out of ozone depleting substances since the signing of the Montreal Protocol in 1987. The availability of hydrocarbons at an early stage of the transition period has made it that a genuine low-GWP and cost-effective alternative has been available for large parts of the foam sector throughout that period, even at the time of the phase-out of CFCs in non-Article 5 Parties. Therefore, the account of the transition history since 1987 in the polyurethane and phenolic product sectors is dominated by whether a specific foam sub-sector could adopt hydrocarbon technologies or not. There have been a number of reasons cited over the period to explain why hydrocarbon solutions were not appropriate. These have included:

- The flammability risks associated with the production/deposition process
- The flammability risks associated with product installation and use
- The higher gaseous thermal conductivity leading to poorer thermal efficiency of the foam
- The cost of flame-proofing measures for production processes in relation to the size of the manufacturing plant (lack of economies of scale)
- Local health & safety regulations
- Local regulations on volatile organic compounds (VOCs)
- Waste management issues

Some of these have largely been discounted in more recent times, but others continue to be of importance and some are even growing in significance (e.g. waste management issues) as hydrocarbon blown foams reach end-of-life. Nevertheless, the market penetration of hydrocarbon technologies has had a substantial impact as shown by the graph below:

Global Trends in Blowing Agent Consumption by Type (1990-2014)



The dominance of the hydrocarbon technologies is even greater than it appears from the graph, since the blowing efficiency of hydrocarbon blowing agents is considerably better than the CFCs and HCFCs that were replaced. This means that the amount of foam blown by the 170,000tes of hydrocarbons predicted to be used in the foam industry in 2014 will be 30-40% greater than would be achieved by the same quantity of CFCs. The optimisation of hydrocarbon technologies over the years has also resulted in improvements in thermal performance through improved cell structure, thereby negating some of the earlier concerns about poorer thermal efficiency.

It can be seen that the other major groups of blowing agents being used for the polyurethane and phenolic foam sectors at this point are HCFCs (in Article 5 Parties) and HFCs (in non-Article 5 Parties. The reasons for this will be explained in the sections that follow within this chapter.

In the Extruded Polystyrene sector, the main low-GWP and cost-effective alternative has been CO_2 itself. Again, the main challenge throughout has been to understand why this solution could not be universal in its application. Reasons have included:

- Processing difficulties with CO_2 and even CO_2/HCO blends
- The higher gaseous thermal conductivity leading to poorer thermal efficiency of the foam
- Costs of conversion - including licensing constraints resulting from patents
- Loss of processing flexibility ruling out some board geometries completely

For these reasons considerable proportions of the extruded polystyrene (XPS) industry have remained using HCFCs and HFCs rather than CO_2. This will be explained further in section 5.8 of this chapter.

In the intervening years, the search for low-GWP, high performance blowing agents without the limitations of hydrocarbons and CO_2 has been continuing. For the first time, the emergence of unsaturated HCFCs and HFCs seems to be offering a level of performance which not only allows the replacement of blowing agents with high-GWPs such as HCFCs and saturated HFCs, but also threatens to replace some elements of the hydrocarbon and CO_2-blown sectors, based primarily on improved thermal properties. However, the continuing unknowns with these technologies are the overall system cost and the global availability. Until, these issues are fully addressed, it will be difficult to elevate their status beyond ‘emerging’. Most manufacturers are indicating levels of commercialisation between late 2013 and 2015. However, in the first instance, this availability is likely to be targeted in markets within non-Article 5 Parties where the requirement for improved thermal efficiency is best identified. Even in these markets, it is expected that blowing agent blends will become predominant, especially where unsaturated HCFCs and HFCs can be blended with hydrocarbons to obtain better thermal performance with minimum system cost increase.

Other blowing agents are also emerging as potential replacements for HCFCs and HFCs. These include a group of oxygenated hydrocarbons (HCOs) which include methyl formate and methylal. These are generally seen as less flammable than the hydrocarbons themselves, although the significance of those differences can often depend on local product codes and the regulatory frameworks governing foam manufacture. Again, there is a growing tendency to see these used as components of tailored blends where they can contribute to overall performance criteria.

For the XPS sector, the emergence of gaseous unsaturated HFCs such as HFO-1234ze also presents a significant opportunity to replace any remaining HCFCs, saturated HFCs and even CO_2 in some instances. However, cost remains a key issue and blending with oxygenated hydrocarbons (e.g. dimethyl ether) may well be required to deliver a commercially viable alternative technology.

In summary, the following table provides an overview of the blowing agent classes which have either previously offered, or are currently offering, alternatives to ozone depleting substances in the sectors being specifically considered in this chapter.

Sector	CFCs	HCFCs	HFCs	HCs	HCOs	HFOs	CO_2-based
	ODS being replaced						
PU Appliances	CFC-11	HCFC-141b HCFC-22	HFC-245fa HFC-365mfc/227ea	cyclo-pentane cyclo/iso-pentane	Methyl$^{\Delta}$ Formate	HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	CO_2 (water)*$^{\Delta}$
PU Board	CFC-11	HCFC-141b	HFC-365mfc/227ea	n-pentane cyclo/iso pentane		HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	
PU Panel	CFC-11	HCFC-141b	HFC-245fa HFC-365mfc/227ea	n-pentane cyclo/iso pentane		HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	CO_2 (water)*
PU Spray	CFC-11	HCFC-141b	HFC-245fa HFC-365mfc/227ea			HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	CO_2 (water)* Super-critical CO_2
PU In-situ/Block	CFC-11	HCFC-141b	HFC-245fa HFC-365mfc/227ea	n-pentane cyclo/iso pentane		HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	CO_2 (water)*
PU Integral Skin	CFC-11	HCFC-141b HCFC-22	HFC-245fa HFC-134a		Methyl Formate Methylal		CO_2 (water)*
XPS Board	CFC-12	HCFC-142b HCFC-22	HFC-134a HFC-152a		DME	HFO-1234ze(E)	CO_2 CO_2/ethanol
Phenolic	CFC-11	HCFC-141b	HFC-245fa HFC-365mfc/227ea	n-pentane cyclo/iso pentane		HFO-1233zd(E) HFO-1336mzzm(Z) AFA-1 (undisclosed)	

*CO_2(water) blown foams rely on the generation of CO_2 from reaction of isocyanate with water in the PU system itself
$^{\Delta}$ Primarily in the commercial refrigeration sector (e.g. vending machines)

5.2 Polyurethane - appliances

In the strictest sense, this sector covers both domestic and commercial appliances, although the major trends characterised in this section of the chapter will be related to the larger, and more homogeneous, domestic sector. However, the statistical information presented graphically will cover both groups of appliances.

5.2.1 Commercially available alternatives to Ozone Depleting Substances

The Task Force Report in response to Decision XXIII/9 provided a full list of HCFC replacement options and offered a summary of the pros and cons of each option, as well as some additional commentary on critical aspects for decision-making in the appliance sector. Decision XXIV/7 has requested that the commercially available options and the alternatives under development (emerging options) be treated separately. Therefore, the Decision XIII/9 Report tables have been reconstituted and updated accordingly.

SECTOR/OPTION	*PROS*	*CONS*	*COMMENTS*
HCFC REPLACEMENT OPTIONS FOR APPLIANCES (DOMESTIC & COMMERCIAL), TRUCKS & REEFERS			
Domestic refrigerators/freezers			
Cyclopentane & cyclo/iso blends	*Low GWP*	*Highly flammable*	*High incremental capital costs but most enterprises in sub-sector are large*
	Low operating costs		*Global industry standard*
	Good foam properties		
Saturated HFCs (HFC-245fa)	*Non-flammable*	*High GWP*	*Low incremental capital costs*
	High operating costs		*Improved insulation (cf. HC)*
	Good foam properties		*Well proven technology*
Commercial refrigerators/freezers plus vending equipment			
Cyclopentane & cyclo/iso blends	*Low GWP*	*Highly flammable*	*High incremental capital cost, may be uneconomic for SMEs*
	Low operating costs		*Well proven technology*
	Good foam properties		
HFC-245fa, HFC-365mfc/227ea	*Non-flammable*	*High GWP*	*Low incremental capital cost*
	Good foam properties	*High operating costs*	*Improved insulation (cf. HC)*
O_2 (water)	*Low GWP*	*Moderate foam properties – high thermal conductivity & high foam density*	*Low incremental capital cost*
	Non-flammable	*High operating costs*	*Improved formulations (second generation) claim no need for density increase vs HFC co-blown*
Methyl Formate	*Low GWP*	*Moderate foam properties -high thermal conductivity & high foam density-*	*Moderate incremental capital cost (corrosion protection recommended)*
	Flammable although blends with polyols may not be flammable	*High operating costs*	
Refrigerated trucks & reefers			
Cyclopentane & cyclo/iso blends	*Low GWP*	*Highly flammable*	*High incremental capital cost, may be uneconomic for SMEs*
	Low operating costs		
	Good foam properties		
HFC-245fa, HFC-365mfc /227ea	*Non-flammable*	*High GWP*	*Low incremental capital cost*
	Good foam properties	*High operating costs*	*Improved insulation (cf. HC)*
CO_2 (water)	*Low GWP*	*Moderate foam properties -high thermal conductivity & high foam density-*	*Low incremental capital cost*
	Non-flammable	*High operating costs*	*Not used in reefers*

The assessment of these alternatives against the criteria of commercial availability, technical proof of performance, environmental soundness (encompassing efficacy, health, safety and environmental characteristics), cost effectiveness (capital and operating) and processing versatility in challenging ambient conditions is, in itself, a challenging objective. Typically, performance against such criteria can only be judged fully on a case-by-case basis and assessments made at a higher level will only be indicative. With this in mind, the following table seeks to give such an indicative assessment based on a nominal ranking of seven categories from '+++' (the best) to '---' (the worst):

	c-pentane	*i-pentane*	*HFC-245fa*	*HFC365mfc/227ea*	*CO_2(water)*	*Methyl Formate*
Proof of performance	+++	+++	+++	++	+	+
Flammability	---	---	++	+(+)	+++	--
Other Health & Safety	0	0	+	+	-	0
Global Warming	+++	+++	--	---	++	++
Other Environmental	-	-	0	0	++	-
Cost Effectiveness (C)	--	---	++	++	++	0
Cost Effectiveness (O)	++	+++	--	--	+	+
Process Versatility	++	++	++	+	0	0

As has been noted in previous reports, the mix of performance properties (technical, economic and environmental) does not lead unambiguously to one single selection. Indeed, the proliferation of blends across the whole of the foam sector and nowhere more so than the appliance sector is an indication of the reality that there is no single best solution. Often a key factor is the size of the manufacturing plant, since the economies of scale have a considerable bearing on the relative importance of capital and operational costs. Cost also is a major factor in the consideration of the major emerging technologies.

5.2.2 Emerging Alternatives

As noted in the 2012 Task Force Report in response to Decision XXIII/9, the major emerging technologies in the appliance sector are based mostly around liquid unsaturated HCFCs/HFCs. These are all fairly similar in their properties and all seem to suggest a stepwise improvement in thermal performance over other low-GWP alternatives. The following table provides an overview of the ‘pros’ and ‘cons’ of these technologies.

HCFC REPLACEMENT OPTIONS FOR APPLIANCES (DOMESTIC & COMMERCIAL), TRUCKS & REEFERS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Domestic refrigerators/freezers			
Unsaturated HFC/HCFCs (HFOs)	*Low GWP*	*High operating costs*	*Successful commercial trials; first expected commercialization in 2013*
	Non-flammable		*Promising energy efficiency performance: equal or better than saturated HFCs*
			Low incremental capital cost
Commercial refrigerators/freezers plus vending equipment			
Liquid Unsaturated HFC/HCFCs (HFOs)	*Low GWP*	*High operating costs*	*First expected commercialization in 2013*
	Non-flammable		*Promising energy efficiency performance: equal or better than saturated HFCs*
			Low incremental capital cost
Refrigerated trucks & reefers			
Liquid Unsaturated HFC/HCFCs (HFOs)	*Low GWP*	*High operating costs*	*First expected commercialisation in 2013*
	Non-flammable		*Promising energy efficiency performance: equal or better than saturated HFCs*
			Low incremental capital cost

The range of unsaturated HCFCs/HFCs remains unchanged from the Decision XXIII/9 Report, with the disclosure of the molecule behind Arkema’s code name AFA-L1 still awaited. However, the following table provides an analysis of these new molecules against the criteria considered for the commercially available alternatives based on limited experience in appliance sector trials.

	HFO-1234ze(E)	*HFO-1336mzzm(Z)*	*HFO-1233zd(E)*	*AFA-L1*
	gaseous	*liquid*	*liquid*	*liquid*
Proof of performance	+	++	++	+
Flammability	++	+++	+++	+++
Other Health & Safety	+	+	+	+
Global Warming	+++	+++	+++	+++
Other Environmental	+	+	+	+
Cost Effectiveness (C)	++	++	++	++
Cost Effectiveness (O)	--	--	--	--
Process Versatility	+	+	+	+

The appliance sector is clearly one of the most sensitive to the thermal performance of the insulation contained within the cabinet, since this dictates both external dimensions and internal storage space. Evidence from trials in the sector continue to reinforce the fact that unsaturated HCFCs/HFCs will deliver 8-12% better thermal performance than cyclo-pentane and 2% better performance than HFC-245fa. The key question is whether these differences will be sufficient to drive the adoption of these alternatives, in place of existing hydrocarbon technologies, in both non-Article 5 and Article 5 Parties. For HFC-245fa replacement in non-Article 5 Parties, the driver will be more about environmental pressure to transition from high-GWP solutions. Finally, where HCFCs are still in use within Article 5 Parties, the question is whether these new blowing agents will be commercially available in time to pose a genuine alternative to hydrocarbon options.

5.2.3 Barriers and restrictions

As noted above, the commercialisation time-line and global availability of the various unsaturated HCFCs/HFCs will have a considerable bearing on their widespread adoption under the HCFC Phase-out Management Plans currently being enacted. Two of the three potential manufacturers are committing to timelines of 2015 or better, but the supply/demand curves for these alternatives are still not fully understood.

One factor in the adoption of these new technologies is the potential use of blends of unsaturated HFCs/HCFCs with hydrocarbons to achieve intermediate thermal performance benefits at affordable cost. If the compromises made are too great, then the benefits will be too marginal to justify transition from existing hydrocarbon solutions where they are already in place, and to prefer unsaturated HCFC/HFC solutions over hydrocarbon where they are not. However, with the cost of these new compounds not completely established at this point, it is not clear whether solutions maximising the thermal performance benefits will be affordable.

For those still using HCFC-141b, one strategy being considered in the case of some manufacturers is to make an intermediate transition to a high-GWP (lower investment) technology option such as saturated HFCs on the written understanding that a further transition to a low-GWP option will follow within a specified period.

The choice would be left open until such time as optimum technology approaches have been established. For transitions directly from HCFC-141b to hydrocarbons, there are potential strategies to reduce the investment costs for smaller enterprises. These include the potential for using pre-blended mixes containing cyclo-pentane. However, this approach is not expected to impact the domestic appliance sector too greatly, since economies of scale would generally support a more comprehensive conversion strategy. Nevertheless, in the case of some manufacturers of commercial appliances (e.g. vending machines), there may be more relevance. Further information is covered under Section 5.4.3.

5.3 Polyurethane - boardstock

This is one of the largest markets for rigid polyurethane foams in non-Article 5 Parties, but has only recently started to grow significantly in Article 5 Parties as requirements for building energy efficiency have increased. The historical analysis therefore focuses primarily on the non-Article 5 experiences.

5.3.1 Commercially available alternatives to Ozone Depleting Substances

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Boardstock – continuously produced			
Cyclopentane & n-Pentane	*Low GWP*	*Highly flammable*	*High incremental capital costs but most enterprises in sub-sector are large*
	Low operating costs		*Industry standard*
	Good foam properties		
HFC-245fa, HFC-365mfc/277ea	*Non-flammable*	*High GWP*	*Low incremental capital cost*
	Good foam properties	*High operating costs*	
			Improved insulation (cf. HC)

Again, drawing from the evaluations conducted for Decision XXIII/9 with relevant updates where necessary, the following table illustrates the commercially available options for the polyurethane boardstock sector.

In general, saturated HFCs have shown little uptake in most PU boardstock markets because the hydrocarbon-based products have been shown to be fit-for-purpose at a more competitive cost. Since new capacity in the industry can accommodate hydrocarbon process safety issues at the design stage, the high incremental capital costs associated with later transitions can be mitigated to some extent.

As building energy standards increase, there could be increasing pressure for better thermal efficiency, especially where space is limited and product thickness is constrained. There has therefore been some interest in possible blends of hydrocarbons with saturated HFCs. Indeed, it is suspected that some manufacturers may have adopted this strategy commercially, although it is difficult to track because no further plant modifications would normally be necessary. Such trends may also be short-lived, since there is increasing market pressure (e.g. through LEED and other environmental building schemes) to avoid the use of saturated HFCs.

According to the chosen criteria, the relative performance of alternative technology solutions in this sector can be summarised as follows:

	c-pentane	*n-pentane*	*i-pentane*	*HFC-245fa*	*HFC365mfc/227ea*
Proof of performance	+++	+++	+++	++	++
Flammability	---	---	---	++	+(+)
Other Health & Safety	0	0	0	+	+
Global Warming	+++	+++	+++	--	---
Other Environmental	-	-	-	0	0
Cost Effectiveness (C)	--	--	--	++	++
Cost Effectiveness (O)	++	+++	+++	--	--
Process Versatility	++	++	++	++	+

The slight environmental concerns reflected for hydrocarbon options relate to some emerging concerns about local VOC regulations. In some regions there are exemptions for thermal insulation manufacturing plants, but this approach is not universal.

5.3.2 Emerging alternatives

The market pressure on saturated HFCs outlined in the previous section opens up the possibility for hydrocarbon blends with unsaturated fluorocarbons (both HCFCs and HFCs). The uncertainty of cost makes this option even less clear cut for PU boardstock than it is for domestic appliances. Nonetheless, there continues to be sufficient interest in the option to justify its inclusion in this section as an emerging technology – albeit as a blend with hydrocarbons.

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Boardstock – continuously produced			
Liquid Unsaturated HFC/HCFCs (HFOs)	*Low GWP*	*High operating costs*	*First expected commercialization in late 2013*
	Non-flammable		*Trials in progress, particularly with blends*
			Low incremental capital cost

The overall assessment of the criteria for unsaturated HCFCs/HFCs is very similar to that shown for PU appliances.

	HFO-1234ze(E)	***HFO-1336mzzm(Z)***	***HFO-1233zd(E)***	***AFA-L1***
	gaseous	*liquid*	*liquid*	*liquid*
Proof of performance	+	++	++	+
Flammability	++	+++	+++	+++
Other Health & Safety	+	+	+	+
Global Warming	+++	+++	+++	+++
Other Environmental	+	+	+	+
Cost Effectiveness (C)	++	++	++	++
Cost Effectiveness (O)	--	--	--	--
Process Versatility	+	+	+	+

The only potential difference is that the use of a gaseous option being used in the PU boardstock sector is less likely than for PU Appliances. Nevertheless, it has been retained for completeness.

5.3.3 Barriers and restrictions

In practice, the quantity of PU boardstock foam still using HCFCs is very limited and this fact alone testifies to the lack of barriers to appropriate transition. As noted earlier, much of the new capacity in the sector has been installed since the ozone issue emerged and the necessary requirements for hydrocarbon have typically been designed in.

The only likely transition pressure now emerging relates to the on-going goal of improved thermal efficiency. The major barrier to the adoption of blends of saturated HFCs with hydrocarbons is market pressure, while the potential barrier to the wider use of unsaturated HFCFs/HFCs is one of cost and, in the short term, availability.

5.4 Polyurethane - panels

In the context of this analysis, the primary panels being referred to are steel-faced and either continuously or discontinuously produced. The market for such panels has developed very differently in various regions of the world, with the early adoption being mostly in Europe. However, the prefabricated approach to building that these panels allow is becoming increasingly widespread globally and manufacturing capacity has continued to grow to meet the need.

5.4.1 Commercially available alternatives to Ozone Depleting Substances

The following table illustrates the main commercially available alternatives in the panel sector.

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Steel-faced panels – continuously produced			
Cyclopentane & n-Pentane	*Low GWP*	*Highly flammable*	*High incremental capital costs but most enterprises in sub-sector are large*
	Low operating costs		*Industry standard*
	Good foam properties		
HFC-245fa, HFC-365mfc/277ea	*Non-flammable*	*High GWP*	*Low incremental capital cost*
	Good foam properties	*High operating costs*	
			Improved insulation (cf. HC)
Steel-faced panels – discontinuously produced			
Cyclopentane & n-Pentane	*Low GWP*	*Highly flammable*	*High incremental capital cost, may be uneconomic for SMEs*
	Low operating costs		
	Good foam properties		
HFC-245fa, HFC-365mfc/277ea, HFC-134a	*Non-flammable*	*High GWP*	*Low incremental capital cost*
	Good foam properties	*High operating costs*	*Improved insulation (cf. HC)*
CO_2 (water)	*Low GWP*	*Moderate foam properties -high thermal conductivity-*	*Low incremental capital cost*
	Non-flammable		
Methyl Formate	*Low GWP*	*Moderate foam properties - high thermal conductivity-*	*Moderate incremental capital cost (corrosion protection recommended)*
	Flammable although blends with polyols may not be flammable		

As noted earlier, the pressure for improved thermal performance in the architectural (cladding) panel is less pronounced than it is for other building insulation types because of the structural requirements which are associated with that application. However, the same cannot be said for refrigerated transport where additional benefits in thermal performance can improve the load-carrying capacity of a vehicle. Therefore, there is on-going interest in saturated HFCs as legitimate alternatives, or at least components of blends for that application.

In the discontinuous sector, there are other potential technologies based around CO_2 (water) and HCOs such as methyl formate. These reduce the perceived risks associated with the use of hydrocarbons on discontinuous plants but do result in some compromises in foam properties including higher density and potentially poorer thermal performance. Nonetheless, they do offer low-GWP solutions in markets which may not be too sensitive to thermal performance issues.
These are all important considerations in the Article 5 context where the need to phase-out HCFCs requires the widest range of alternatives, especially for small and mixed use discontinuous panel facilities. The strengths and weaknesses of these alternatives are once again shown in the following table – this time relating to the panel sector.

	c-pentane	i-pentane n-pentane	HFC-245fa	HFC365mfc/227ea	CO_2(water)	Methyl Formate
Proof of performance	+	++	++	++	++	+
Flammability	---	---	++	+(+)	+++	--
Other Health & Safety	0	0	+	+	-	0
Global Warming	+++	+++	--	---	++	++
Other Environmental	-	-	0	0	++	-
Cost Effectiveness (C)	--	---	++	++	++	0
Cost Effectiveness (O)	++	+++	--	--	+	+
Process Versatility	++	++	+	++	+	+

5.4.2 Emerging alternatives

Again, the major emerging alternatives are unsaturated HCFCs/HFCs. In view of the relative abundance of commercially available alternatives, these blowing agents are likely to be focused on niche markets in the panel sector.

In principle, unsaturated HCFCs/HFCs offer opportunities for improving thermal performance while retaining a low-GWP blowing agent. For reasons stated in respect of other foam sectors, the cost of these blowing agents is still uncertain and could prevent reliance on them in isolation. That said, the added value of a panel is certainly greater than that of boardstock, so the ability to adsorb cost could be greater in this sector.

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Steel-faced panels – continuously produced			
Liquid Unsaturated HFC/HCFCs (HFOs	*Low GWP*	*High operating costs*	*First expected commercialisation in 2013*
	Non-flammable		*Trials in progress*
			Low incremental capital cost
Steel-faced panels – discontinuously produced			
Liquid Unsaturated HFC/HCFCs (HFOs	*Low GWP*	*High operating costs*	*First expected commercialisation in 2013*
	Non-flammable		*Trials in progress*
			Low incremental capital cost

Nevertheless, the most likely approach will be the adoption of blends with hydrocarbons provided that an incremental improvement in thermal performance can be achieved. This will be particularly important for the thermally sensitive applications such as refrigerated transport. The proof of performance is at a lower level in this sector than elsewhere and this is reflected in the following table:

	HFO-1234ze(E)	HFO-1336mzzm(Z)	HFO-1233zd(E)	AFA-L1
	gaseous	liquid	liquid	liquid
Proof of performance	0	+	+	0
Flammability	++	+++	+++	+++
Other Health & Safety	+	+	+	+
Global Warming	+++	+++	+++	+++
Other Environmental	+	+	+	+
Cost Effectiveness (C)	++	++	++	++
Cost Effectiveness (O)	--	--	--	--
Process Versatility	+	+	+	+

5.4.3 Barriers and restrictions

The major barriers to the substitution of alternatives in the panel sector are not primarily related to the technologies available but to the wide range of enterprises involved (both in size and location) and the broad spectrum of applications served. Versatility is a key necessity for any technology in the discontinuous sector, but no single solution has emerged as being as versatile as the ozone depleting substances replaced. This may act as a deterrent to early phase-out of the remaining HCFC use in Article 5 enterprises where local requirements need to be matched.

5.5 Polyurethane - spray

Polyurethane spray foam has been used for many years as an efficient means of insulating structures which would be difficult to insulate in other ways, because of shape or location An example would be that of an insulated road tanker. Another would be the insulation of large flat roofs which may not be as flat as might be presumed! More recently, however, polyurethane spray foams have emerged as a vital component of renovation strategies for existing buildings. Again, the efficiency and versatility of application, as well as the relative durability and thermal efficiency are all characteristics which have contributed to the rapid growth of PU spray foam in both developed and developing regions.

5.5.1 Commercially available alternatives to Ozone Depleting Substances

The commercially available technologies have been largely referenced already in the narrative, but can be summarised as follows:

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Spray foam			
Cyclopentane & n-Pentane	*Low GWP*	*Highly flammable*	*Unsafe to use in this application*
HFC-245fa, HFC-365mfc/277ea	*Non-flammable*	*High GWP*	*Industry standard*
	Good foam properties	*High operating costs but improved by using mixed HFC/ CO_2 (water)*	
CO_2 (water)	*Low GWP*	*Moderate foam properties -high thermal conductivity & high density-*	*Extra thickness leading to a cost penalty*
	Non-flammable		
Methyl Formate	*Low GWP*	*Flammable although blends with polyols may not be flammable*	*Safety concerns when used for this application*

It is important to note that the impacts of the saturated HFCs have been reduced by co-blowing with CO_2 (water) in order to deliver a lower overall global warming impact. However, one of the other major drivers has been to reduce cost. As will be seen in Section 5.5.2, this may be an important approach for the future.

HCOs (most notably methyl formate) have also been used for some PU spray work. The potential of supplying the system to site as blended polyol is believed to contribute to the management of risk, but it is still unclear whether the hazards seen with hydrocarbons in confined spaces have been avoided using the slightly less flammable methyl formate. Work continues in this area, although some systems are already being used commercially. The performance of these ODS alternatives against the criteria for this report can be summarised as follows:

	HFC-245fa	*HFC365mfc/227ea*	*Super-critical CO_2*	*CO_2(water)*	*Methyl Formate*
Proof of performance	+++	+++	++	++	+
Flammability	++	+(+)	++	+++	--
Other Health & Safety	+	+	+	-	0
Global Warming	--	---	++	++	++
Other Environmental	0	0	+	++	-
Cost Effectiveness (C)	++	++	0	++	0
Cost Effectiveness (O)	--	--	+	++	++
Process Versatility	++	++	+	+	+

5.5.2 Emerging alternatives

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Spray foam			
Liquid Unsaturated HFC/HCFCs (HFOs	*Low GWP*	*High operating costs but improved by using mixed HFC/ CO_2 (water)*	*First expected commercialisation from 2013*
	Non-flammable		*Trials in progress*
			Low incremental capital cost

Alongside the appliance sector, the PU spray foam sector is attracting the most interest for potential adoption of the unsaturated HCFCs/HFCs. The rapid growth rate for the sector overall, the absence of serious low-GWP contenders and the fact that relatively high emission rates make the climate impact more immediate all align to encourage the manufacturers to focus on this application.

The cost of the alternatives remains the key question but this consideration is slightly diffused by the fact that the CO_2(water) technology developed around HFC-245fa and HC-365mfc/227ea looks transferable to the unsaturated blowing agents as well. Manufacturers are in the process of field trials and the development of fairly sophisticated life cycle assessments to ensure that they have assessed the environmental impacts correctly. The co-blowing solution does not detract significantly from the overall thermal performance of the foam and the introduction of a low-GWP solution of this type would clear the way for widespread use of PU spray foam in a wide variety of refurbishment applications over the next 30-50 years as global attention focuses increasingly on building energy efficiency in existing stock. A summary of these blowing agents against the report criteria is as follows:

	HFO-1234ze(E)	***HFO-1336mzzm(Z)***	***HFO-1233zd(E)***	***AFA-L1***
	gaseous	*liquid*	*liquid*	*liquid*
Proof of performance	0	++	++	0
Flammability	++	+++	+++	+++
Other Health & Safety	+	+	+	+
Global Warming	+++	+++	+++	+++
Other Environmental	+	+	+	+
Cost Effectiveness (C)	++	++	++	++
Cost Effectiveness (O)	--	--	--	--
Process Versatility	+	++	++	+

5.5.3 Barriers and restrictions

Since the future of the sector rests largely on the emerging technologies, the main barriers relate to the economics and availability of the unsaturated blowing agents. Much of the PU spray foam activity in China remains reliant on HCFC-141b and there is reluctance to make a transition to a sub-optimal solution when an emerging technology could out-perform it within 5 years. Various strategies are being considered including a two-step option via saturated HFCs. However, there is a need to gain commitment to the second conversion at the outset.

5.6 Polyurethane – in-situ/block

One of the enduring advantages of polyurethane chemistry in general, and polyurethane foams in particular, is their ability to meet a broad range of applications. Since these applications can be diverse, ranging from cavity filling (e.g. buoyancy on leisure boats) to the fabrication of complex shapes required for pipe and flange insulation, the in-situ and block processes provide a resource to meet these needs. Self-evidently, these applications are also difficult to track in any organised way since they vary so much. Nevertheless, it is possible to track the manufacturing facilities that provide these products and services.

5.6.1 Commercially available alternatives to Ozone Depleting Substances

The commercially available alternatives to HCFCs in the in-situ and block sectors are summarised in the following table:

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Insulated pipes (pipe-in-pipe for district central heating systems)and other in-situ systems			
Cyclopentane	*Low GWP*	*Highly flammable*	*High incremental capital cost*
	Low operating costs		*Industry standard*
	Good foam properties		
HFC-245fa, HFC-365mfc/277ea	*Non-flammable*	*High GWP*	
	Good foam properties	*High operating costs*	
CO_2 (water)	*Low GWP*	*Moderate foam properties -high thermal conductivity-*	
	Non flammable		
Block foams for various applications including panels, pipe insulation section, etc			
Cyclopentane & n-Pentane	*Low GWP*	*Highly flammable*	*High conversion costs, may be uneconomic for SMEs*
	Low operating costs		*Well proven technology*
	Good foam properties		
HFC-245fa, HFC-365mfc/277ea	*Non-flammable*	*High GWP*	*Low conversion costs*
	Good foam properties	*High operating costs but improved by using mixed HFC/ CO_2 (water)*	
CO_2 (water)	*Low GWP*	*Moderate foam properties -high thermal conductivity & poor ageing-*	*Extra thickness leading to a cost penalty*
	Non flammable		

As with other thermal insulation sectors, saturated HFCs are used in block foams with a CO_2(water) co-blowing agent to limit climate impact and also to optimise the cost/performance relationship. It has generally been found that levels of saturated HFC can be lowered in these formulations to around 50-60% of the blowing agent mix without having a detrimental effect on thermal performance. The blowing agent criteria for block and in-situ foams are shown below. In some instances, more than one rating is providing reflecting the fact that there is a disparate set of processes represented in this category.

	c-pentane	*n-pentane*	*HFC-245fa*	*HFC365mfc/227ea*	*CO_2(water)*
Proof of performance	+/++	+/++	++	++	++
Flammability	---	---	++	+(+)	+++
Other Health & Safety	0	0	+	+	-
Global Warming	+++	+++	--	---	++
Other Environmental	-	-	0	0	++
Cost Effectiveness (C)	--	---	++	++	++
Cost Effectiveness (O)	++	+++	--	--	+
Process Versatility	++	++	++	++/+++	+/++

5.6.2 Emerging alternatives

In this instance, the Task Force has chosen to categorise methyl formate in the emerging alternative category. This reflects the fact that some of the applications across the sector have yet to be trialled using this HCO blowing agent. There are expected to be some limitations based on densities achievable and risks of corrosion with some equipment, but the availability of a relatively low cost, low-GWP solution with lower flammability than the pentanes may still prove of relevance for the sector going forward.

HCFC REPLACEMENT OPTIONS FOR PU FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Block foams for various applications including panels, pipe insulation section, etc			
HCO (Methyl Formate)	*Low GWP*	*Higher density required*	*Density increase necessary through role of MF as a solvent*
Liquid Unsaturated HFC/HCFCs (HFOs	*Low GWP*	*High operating costs*	*Trials in progress*
	Non-flammable		

The option of liquid unsaturated HCFCs/HFCs in this sector is legitimate, but there is some concern that price and geographic availability may be significant limiting factors. Again, co-blowing with CO_2 (water) may prove helpful for cost reasons, but uptake is expected to be more limited than in other sectors of the foam industry. The following table shows an assessment against the report criteria:

	Methyl Formate	***HFO-1336mzzm(Z)***	***HFO-1233zd(E)***	***AFA-L1***
		liquid	*liquid*	*liquid*
Proof of performance	0/+	++	++	0
Flammability	--	+++	+++	+++
Other Health & Safety	+	+	+	+
Global Warming	+++	+++	+++	+++
Other Environmental	+	+	+	+
Cost Effectiveness (C)	++	++	++	++
Cost Effectiveness (O)	--	--	--	--
Process Versatility	+	++	++	++

5.6.3 Barriers and restrictions

One of the major barriers to transition in this sector is the size and location of the enterprises involved. The provision of sophisticated low-GWP alternatives does not extend easily to these more diffuse networks and the effectiveness of transitions relies massively on the competence and commitment of the systems houses supplying the small and micro-enterprises. Efforts are needed to raise the profile of these operations with blowing agent technology providers and their supply networks.

5.7 Polyurethane – integral skin

Integral skin foams are the one group of foams which are not primarily used for thermal insulation purposes. They sub-divide into two types – 'rigid integral skin' (typically items such as steering wheels in automobiles) and 'flexible integral skin' (typically covering items such as shoe soles and some packaging foams). As the name suggests, the primary feature of integral skin products is their ability to encapsulate a relatively low density core (for weight saving purposes) with an integrated skin which is made from the same material and in the same process. As a polymer, polyurethane is particularly versatile in forming a resilient skin when moulded and this provides a level of utility which is rarely seen in other product types.

5.7.1 Commercially available alternatives to Ozone Depleting Substances

The following table lists the commercially available options as of today:

HCFC REPLACEMENT OPTIONS FOR INTEGRAL SKIN PU FOAMS FOR TRANSPORT & FURNITURE APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Integral skin foams			
CO_2 (water)	*Low GWP*	*Poor skin quality*	*Suitable skin may require* in-mould-coating – *added expense*
	Low conversion costs		*Well proven in application if skin acceptable*
n-Pentane	*Low GWP*	*Highly flammable*	*High conversion costs, may be uneconomic for SMEs*
	Low operating costs		*Low operating costs*
	Good skin quality		*Well proven in application*
Shoe-soles			
CO_2 (water)	*Low GWP*		*Well proven in application with polyester polyol technology*
	Low conversion costs		
	Skin quality suitable for sports shoe mid-soles		
HFC-134a or HFC-245fa	*Used to give required skin in town shoes*	*High GWP/Cost*	

The specific ranking of these blowing agent options is shown in the table below.

	n-pentane	***HFC-134a***	***HFC-245fa***	***CO_2(water)***
Proof of performance	++	++	+	++
Flammability	---	+++	++	+++
Other Health & Safety	0	+	+	-
Global Warming	+++	---	---	++
Other Environmental	-	0	0	++
Cost Effectiveness (C)	---	++	++	++
Cost Effectiveness (O)	+++	--	--	+
Process Versatility	++	++	++	0

5.7.2 Emerging alternatives

The area of most interest with respect to emerging technologies is the potential use of oxygenated hydrocarbons (HCOs). Both methyl formate and methylal are being considered for these applications and the early indications are that they could be significant future alternatives in the sector. Although both a flammable, the level of flammability is less than that associated with pure hydrocarbons. There is also the potential that systems houses may be able to formulate blended systems in such a way as to avoid flammability issues in the workplace. One area of concern for methyl formate is the potential corrosion of moulds, but at the levels of addition, this may not be a problem in practice. The other issue relating to both HCOs the high solvency power of the blowing agents which could lead to some softening of the skins. The following table summarises the issues:

HCFC REPLACEMENT OPTIONS FOR INTEGRAL SKIN PU FOAMS FOR TRANSPORT & FURNITURE APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Integral skin foams			
Methyl formate	*Low GWP*	*Flammable although blends with polyols may not be flammable*	*Moderate conversion costs*
	Good skin quality	*Moderate operating costs*	*Newly proven in application*
Methylal	*Low GWP*	*Flammable although blends with polyols may not be flammable*	*High conversion costs, may be uneconomic for SMEs*
	Good skin quality	*Moderate operating costs*	*No industrial experience*
Shoe-soles			
Methyl formate	*Low GWP*	*Flammable although blends with polyols may not be flammable*	*Moderate conversion costs*
	Good skin quality	*Moderate operating costs*	*Newly proven in application*
Methylal	*Low GWP*	*Flammable although blends with polyols may not be flammable*	*High conversion costs, may be uneconomic for SMEs*
	Good skin quality	*Moderate operating costs*	*No industrial experience*

Again, the specific performance ranking of the blowing agents is shown in the table below:

	Methylal	***Methyl Formate***
Proof of performance	+	++
Flammability	--	--
Other Health & Safety	0	0
Global Warming	++	++
Other Environmental	-	-
Cost Effectiveness (C)	+	0
Cost Effectiveness (O)	++	++
Process Versatility	+(+)	+(+)

It is noteworthy to mention that unsaturated HFCs/HCFCs are not seen as a realistic emerging technology in this sector because of the cost implications and the lack of any significant performance enhancement.

5.7.3 Barriers and restrictions

There are no fundamental barriers to the introduction of the emerging technologies, although pilot projects on the pre-blending of HCOs in polyols will be necessary. There have been some concerns in the past about the implications of the limited supplier base and access to intellectual property, although these have been largely addressed. However, the biggest challenge to the replacement of any remaining use of ozone depleting substances will be the roll-out of these technologies on a sufficiently widespread basis.

If the widespread introduction of HCOs can be successful, there is likely to be the gradual replacement of both saturated HFCs (HFC-134a and HFC-245fa) and CO_2(water) blown technologies. The replacement of saturated HFCs, will certain deliver some additional climate benefits.

5.8 Extruded polystyrene - board

Extruded polystyrene board is unique amongst the foam sectors considered in this report in that it is blown exclusively with gaseous blowing agents. This is a consequence of the extrusion process. Extruded polystyrene (XPS) should not be confused with expanded polystyrene (EPS – also sometimes called 'bead foam') which uses pre-expanded beads of polystyrene containing pentane. EPS has never used ozone depleting substances and is seldom addressed in UNEP Reports for the Montreal Protocol. XPS is used primarily as a building insulation and often competes with PU boardstock. Its particular competitive advantage is in relation to its moisture resistance which makes it especially useful for under-floor insulation applications. There is another form of XPS known as 'Sheet' which is typically used for non-insulating applications such as leisure products (e.g. surf boards) and packaging materials. XPS sheet exited from CFC use early in the history of the Montreal Protocol and has used hydrocarbons almost exclusively ever since.

5.8.1 Commercially available alternatives to Ozone Depleting Substances

The following table illustrates the commercially available alternatives in the extruded polystyrene sector:

HCFC REPLACEMENT OPTIONS FOR XPS FOAM			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Extruded Polystyrene Foams			
Butane	*Low GWP*	Highly flammable	
	Low operating costs		
HFC-134a/HFC-152a	*Non-flammable*	*High GWP*	
	Good foam properties, especially thermal performance	*Medium/high operating costs*	
CO_2 /Ethanol/DME	*Low GWP, low unit cost*	*Small operation window*	*Difficult to process especially for more than 50mm thickness board*
	Non-flammable	*Flammable co-blowing agent*	*Need ethanol and DME as co-blowing agent*

As described earlier in this section, these three alternatives describe the primary options available in each of the three main non-Article 5 regions of the world. It should be noted that blends of saturated HFCs (HFC-134a/HFC-152a) are substantially used in Europe and, to a lesser extent in Japan, primarily by smaller producers who do not have the access to CO_2 technology or serve markets that cannot accept the flammability of hydrocarbon solutions. The assessment of these blowing agents via the criteria of this report is shown in the following table:

	butane	*HFC-134a/ HFC-152a*	*CO_2 with ethanol or DME*
Proof of performance	++	+++	++
Flammability	---	+++	++
Other Health & Safety	0	+	+
Global Warming	+++	---	+++
Other Environmental	-	0	0
Cost Effectiveness (C)	--	++	---
Cost Effectiveness (O)	+++	--	++
Process Versatility	++	++	+

5.8.2 Emerging alternatives

HCFC REPLACEMENT OPTIONS FOR XPS FOAM			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Extruded Polystyrene Foams			
Gaseous unsaturated HFCs (HFOs)	*Low GWP*	*High unit cost*	*Semi-commercial availability – under evaluation*

For all the reasons expressed in this section, there is considerable interest in the potential of unsaturated gaseous HCFCs/HFCs as either blowing agents or co-blowing agents with HCOs such as ethanol or dimethyl ether (DME). The technological solution has the potential of becoming a relative standard in the industry, but the key deciding factor in that respect will be the cost. This aspect is reflected in the criteria assessment below:

	HFO-1234ze(E)
	Gaseous
Proof of performance	+
Flammability	++
Other Health & Safety	+
Global Warming	+++
Other Environmental	+
Cost Effectiveness (C)	++
Cost Effectiveness (O)	--
Process Versatility	++

5.8.3 Barriers and restrictions

For the HCFC consuming market in China and elsewhere, the challenge is to decide whether there is a transitional option that moves to a low-GWP alternative before the availability of unsaturated HFCs such as HFO-1234ze(E) is secured. It is clear that hydrocarbons would have been an obvious option and that would have been a high priority for a number of producers in China operating under the HCFC Phase-out Management Plan there. However, in recent years, there have been a series of fires (mostly in the construction phase of major building projects) which have caused a reaction against organic insulation materials in general and XPS in particular. One of the underlying problems has been the inconsistency in use of flame retardants within XPS formulations, with recycled feedstock not being properly characterised in some instance. The XPS industry is making a strong case that properly formulated XPS board can be used safely throughout its lifecycle, but these developments have created a further barrier to the introduction of hydrocarbons as blowing agents at this sensitive time.

The introduction of unsaturated HFCs will certainly avoid such a controversy, but the availability of such technology in Article 5 Parties is uncertain – particularly when the technology is yet to be commercially adopted elsewhere. There is also the unanswered question concerning the impact on cost. A temporary switch to saturated HFC blends could ensure that the Montreal Protocol objectives are met, but this will do little to benefit the climate when over 1 billion tonnes of CO_2-eq could be avoided by a more benign solution.

5.9 Phenolic foams

Phenolic foams are manufactured by a number of different processes, many of which shadow those already discussed for polyurethane foams. The largest markets for the product are as phenolic boardstock (manufactured by continuous lamination) and block foams, used primarily for fabricating pipe work insulation. Although the product made an entry into the North American market in the early 1980s, the particular technology was dogged with problems. As a result, there is little use of phenolic foam in that region today. However, successful phenolic boardstock technologies emerged in both Europe and Japan, with sales of the product continuing to grow, not only because of overall increases in the demand for thermal insulation, but also because of gains in market share. Phenolic foam's main competitive advantage rests in its intrinsic fire and smoke properties. However, since it is made by an emulsion process, it also offers smaller cells which result in improved thermal performance. More recently, the product has begun to emerge on the Chinese market - in part as a response to concerns over recent fires.

The use of phenolic foam as pipework insulation also stems from the intrinsic fire and smoke properties of the product and the growth of the product's use has been particularly strong in regions where internal fire regulations are strict or where the high rise nature of construction requires additional fire precautions.

5.9.1 Commercially available alternatives to Ozone Depleting Substances

The following table sets out the commercially available alternatives for the phenolic foam sector:

HCFC REPLACEMENT OPTIONS FOR PF FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Continuous processes (including flexibly-faced lamination and pipe section manufacture)			
n- pentane/iso-pentane	*Low GWP*	*Highly flammable*	*High incremental capital cost*
	Low operating costs		*Industry standard*
	Good foam properties		
HFC-365mfc/277ea	*Non-flammable*	*High GWP*	
	Good foam properties	*High operating costs*	
2-chloropropane	*Low GWP*	*Negligible ODP*	
	Non flammable		
Block foams for various applications including panels, pipe insulation section, etc			
HFC-365mfc/277ea	*Non-flammable*	*High GWP*	*Low conversion costs*
	Good foam properties	*High operating costs but improved by using mixed HFC/ CO_2 (water)*	

The lack of low-GWP alternatives for discontinuous block foams signals the need for further work in this area. However, the ranking of these options against the report criteria can be summarised as follows:

	n-pentane i-pentane	*2-chloropropane*	*HFC-365/227ea*
Proof of performance	+++	+++	+
Flammability	---	0	++
Other Health & Safety	0	0	+
Global Warming	+++	+++	---
Other Environmental	-	0	0
Cost Effectiveness (C)	---	-	++
Cost Effectiveness (O)	+++	+	--
Process Versatility	++	+	++

5.9.2 *Emerging alternatives*

As with other sectors, there is considerable focus on the potential of unsaturated HFCs/HCFCs.

HCFC REPLACEMENT OPTIONS FOR PF FOAM FOR BUILDING/ CONSTRUCTION APPLICATIONS			
SECTOR/OPTION	***PROS***	***CONS***	***COMMENTS***
Continuous processes (including flexibly-faced lamination and pipe section manufacture)			
Unsaturated HFC/HCFC liquids	*Non-flammable*	*Low conversion costs*	*Limited trials at this stage*
	Good foam properties	*High operating costs*	
Block foams for various applications including panels, pipe insulation section, etc			
Unsaturated HFC/HCFC liquids	*Non-flammable*	*Low conversion costs*	*Limited trials at this stage*
	Good foam properties	*High operating costs*	

One drawback for the adoption of this technology in phenolic foam is that there is no CO_2(water) co-blowing to offset some of the cost. Another option might be to use unsaturated HFCs/HCFCs as components of blends with hydrocarbons or other blowing agents. However, care will need to be taken with discontinuous block foams to avoid process flammability issues. The following table summarises the current status of these emerging options with respect to phenolic foam.

	HFO-1336mzzm(Z)	***HFO-1233zd(E)***	***AFA-L1***
	liquid	*liquid*	*liquid*
Proof of performance	0	-	--
Flammability	+++	+++	+++
Other Health & Safety	+	+	+
Global Warming	+++	+++	+++
Other Environmental	+	+	+
Cost Effectiveness (C)	++	++	++
Cost Effectiveness (O)	--	--	--
Process Versatility	+(+)	+(+)	+(+)

5.9.3 *Barriers and restrictions*

The main technical barriers to the transition to unsaturated HFCs/HCFCs have already been set out in the previous section and these need to be addressed in a first stage assessment. However, even if the technical hurdles are overcome, the investment case may not be compelling for the transition out of saturated HFCs in the discontinuous block foam sector in view of the small quantities consumed. It may require market pressure on the continued use of saturated HFCs or evidence of significant thermal performance improvements to provide additional support for the next transition step.

6 Fire protection alternatives to Ozone Depleting Substances

6.1 Introduction

This section addresses the requirements of "Decision XXIV/7: Additional information on alternatives to ozone-depleting substances" (given in chapter 1) as it pertains to fire protection. The Halons Technical Options Committee (HTOC) has provided these responses at the request of the Task Force addressing the Decision.

The production and consumption of halons used in fire protection ceased in non-Article 5 Parties on January 1, 1994 and ceased elsewhere on January 1, 2010. The production and consumption of HCFCs for use in fire protection continues. Ozone depleting substances (ODS) used as fire extinguishants possess unique efficacy and safety properties that serve as a basis of fire protection systems where the application of water (by hose stream or sprinkler heads), dry chemical agents, or aqueous salt solutions is problematic, especially in high-value commercial electronics environments and in military systems, to name only two of many applications where such systems had many serious technical disadvantages.

Development of alternatives to ODS fire extinguishing agents, beginning in the early 1990's, has progressed steadily and is now relatively mature. Interest remains, however, in development of new alternatives that offer further advancements in efficacy, safety, and environmental characteristics. This section summarises the alternatives to ODS fire extinguishing agents that have achieved a significant presence in the marketplace, their key physical, safety, and environmental characteristics, and the status of prospective new alternatives that have yet to be commercialised.

The following terms, used in the tables below, have the meanings indicted.

<u>Efficacy</u> refers to suitability for fire extinguishing. Values of minimum design concentrations (MDC) are given for Class A and Class B hazards. [6]

<u>Agent toxicity</u> is benchmarked against the maximum agent concentration in air for which use in normally occupied spaces is allowed in many jurisdictions. The exposure limit for halogenated agents is related to inhalation toxicity and the risk of causing an adverse cardiac effect. The exposure limit is usually one of the following: [7]

(a) the NOAEL (No Observed Adverse Effect Level) value; or
(b) the LOAEL (Lowest Observed Adverse Effect Level) value; or
(c) a value based on PBPK (physiologically-based pharmaco-kinetic) modeling.

For the use of inert gas agents, other than carbon dioxide, in normally occupied spaces, the limiting agent concentration is related to the minimum allowed residual oxygen concentration achieved after discharge. On this basis the limiting inert gas agent concentration has been set at 52 vol% (See ISO 14520-1).

Carbon dioxide is not suitable for use as a total flooding fire extinguishing agent in normally occupied spaces owing to its toxicity.

<u>Safety characteristics</u> are taken to mean with respect to aspects of an agent that relate to safe operational and handling activities.

<u>Environmental characteristic</u> refers to ozone depletion potential (ODP) and GWP (100-year Global Warming Potential) or other characteristics, if applicable.

[6] See ISO 14520 parts 5, 8, 9, 10, 12, 13, 14, and 15

[7] See ISO 14520-1:2006, Annex G (informative), Safe personnel exposure guidelines.

The use of ODS in fire protection applications in high ambient temperatures and high urban density cities does not require special attention, i.e. they have no impact on the use.

The use of ODS in fire protection applications at low ambient temperatures (< -20 °C) is addressed.

6.2 Response to Question 1(a)

6.2.1 Commercially available, technically proven alternatives to ODS for total flooding fire protection using fixed systems

In the tables below, cost effectiveness is represented by an index that is benchmarked against carbon dioxide total flooding systems, averaged over a wide range of application sizes, exclusive of the cost of pipe, fittings and installation and is based on 2003 data. Owing to commercial confidentiality, it has not been possible to use more current data, but nevertheless the indices are believed to be relatively accurate.

6.2.1.1 Halocarbon Agents (with ODP zero)

Agent	**FK-5-1-12**	**HFC-23**	**HFC-125**	**HFC-227ea**
Efficacy	For use in occupied spaces MDC(A)[8] = 5.3 vol% MDC(B) = 5.9 vol%	For use in occupied spaces MDC(A) = 16.3 vol% MDC(B) = 16.4 vol% • Suitable for inerting some flammable atmospheres at concentrations < LOAEL value. • Suitable for use at low temp (< -20 C).	For use in occupied spaces MDC(A) = 11.2 vol% MDC(B) = 12.1 vol%	For use in occupied spaces MDC(A) = 7.9 vol% MDC(B) = 9.0 vol%
Toxicity	NOAEL = 10 vol% LOAEL > 10 vol%	NOAEL = 30 vol% LOAEL > 30 vol%	NOAEL = 7.5 vol% LOAEL = 10 vol% • Approved for use in occupied spaces at up to 11.5 vol% based on PBPK modelling.	NOAEL = 9 vol% LOAEL = 10.5 vol% • Approved for use in occupied spaces at up to 10.5 vol% based on PBPK modelling.
	Some acidic decomposition products are formed when a halogenated fire extinguishing agent extinguishes a fire.			
Safety Characteristics	Liquid at 20 °C B.P. = 49.2 °C	Liquefied. Compressed gas. B.P. = -82 °C	Liquefied compressed gas. B.P. = -48.1 °C	Liquefied compressed gas. B.P. = -16.4°C
[9] GWP	GWP = 1[10]	GWP = 12 000	GWP = 3400	GWP = 3500
Cost-Effectiveness, avg. 500-5000 m3 volume (2003 data)	~1.7 to 2.0	~2.0 to 2.3	Not available	~1.5

8 MDC(A) and MDC(B) refer to the minimum design concentration for a Class A or Class B fire hazard.

9 100-year GWP, IPCC Third Assessment Report: Climate Change 2001

10 Reported by manufacturer

6.2.1.2 *Inert Gas Agents*

Agent	IG-01	IG-100	IG-55	IG-541
Efficacy	For use in occupied spaces MDC(A) = 41.9 vol% MDC(B) = 51 vol%	For use in occupied spaces MDC(A) = 40.3 vol% MDC(B) = 43.7 vol%	For use in occupied spaces MDC(A) = 40.3 vol% MDC(B) = 47.5 vol%	For use in occupied spaces MDC(A) = 39.9 vol% MDC(B) = 41.2 vol%
Toxicity	52 vol% limit for 5 min. Egress			
Safety Characteristics	High-pressure compressed gas up to 300 bar			
Environmental Characteristics	No adverse characteristics			
Cost-Effectiveness, avg. for 500 to 5000 m3 volume (2003 data)	~1.8	~1.8	~1.8	~1.8

6.2.1.3 *Carbon Dioxide*

Agent	Carbon dioxide, CO_2
Efficacy	For use in unoccupied spaces Basic design concentration = 34 vol% for a “material factor” of 1. Design concentrations for specific combustible materials are determined by multiplying the basic design concentration by an applicable material factor. [11]
Toxicity	Progressively more severe physiological effects as exposure concentration increases, especially above 10 vol%. Carbon dioxide concentrations that exceed 17 vol% present an immediate risk to life. [12] Pre-discharge alarm and discharge time delay required.
Safety Characteristics	Liquefied compressed gas Storage pressure: High-pressure cylinder: 55.8 bar at 20 °C Low-pressure tanks (refrigerated): 21 bar at -18 °C Sublimes at -78.5 °C at atmospheric pressure; cold exposure hazard. Vapours are denser than air and can accumulate in low-lying spaces.
Environmental Characteristics	GWP = 1
Cost-Effectiveness, avg. for 500 to 5000 m3 volume (2003 data)	1

[11] See ISO 6183:2009

[12] See U.S. Environmental Protection Agency, “Carbon Dioxide as a Fire Suppressant: Examining the Risks,” February 2000.

6.2.1.4 *Water Mist Technology*

Agent	Water mist
Efficacy	For use in occupied spaces. Uses ~1/10th water as a traditional sprinkler system to suppress fires, where tested.
Toxicity	None
Safety Characteristics	No adverse safety characteristics
Environmental Characteristics	No adverse characteristics
Cost-Effectiveness, avg. for a 3000 m^3 application space	~2

6.2.1.5 *Inert Gas Generators*

Agent	Inert gas by pyrotechnic generator
Efficacy	For use in occupied spaces.
Toxicity	None for generators that produce nitrogen or nitrogen-water vapour
Safety Characteristics	Potentially hot-gas discharge; potential hot surfaces of generator body. Insulating consideration required by generator manufacturer.
Environmental Characteristics	No adverse characteristics
Cost-Effectiveness	Not available

6.2.1.6 *Fine Solid Particles (Powders)*

Agent	Fine solid particles
Efficacy	For use in normally unoccupied spaces.
Toxicity	Precautions require evacuation of spaces before discharge.
Safety Characteristics	For establishments manufacturing the agent or filling, installing, or servicing containers or systems to be used in total flooding applications, United States EPA recommends the following: - adequate ventilation should be in place to reduce airborne exposure to constituents of agent; - an eye wash fountain and quick drench facility should be close to the production area; - training for safe handling procedures should be provided to all employees that would be likely to handle containers of the agent or extinguishing units filled with the agent; - workers responsible for clean-up should allow for maximum settling of all particulates before re-entering area and wear appropriate protective equipment
Environmental Characteristics	No adverse characteristics
Cost-Effectiveness	Not available

6.2.2 *Commercially available, technically proven alternatives to ODS for local application fire protection using portable systems*

In the tables below, cost effectiveness is represented by an index benchmarked against the approximate cost of a portable carbon dioxide extinguisher unit that has a UL 10B rating.

6.2.2.1 *Carbon Dioxide*

Agent	Carbon dioxide, CO_2
Efficacy	For use on Class B fires Can be used on most electrically energised equipment fires.
Toxicity	High exposure risk where carbon dioxide gas accumulates in confined spaces that may be entered by personnel.
Safety Characteristics	Liquefied compressed gas Storage pressure: 55.8 bar at 20 °C Solid CO2 (“dry ice”) sublimes at -78.5 °C at atmospheric pressure. Presents a cold-exposure hazard. Vapours usually flow to floor level so personnel exposure risk is normally low.
Environmental Characteristics	GWP = 1
Cost-Effectiveness	1

6.2.2.2 *Halogenated Agents*

Agent	Halogenated agents
Efficacy	For use on Class A fires For use on Class B fires For use on fires involving electrified equipment
Toxicity	Vapour exposure risk usually low. Vapour toxicity low to moderate.
Safety Characteristics	Pressurised hand-held container.
Environmental Characteristics	HFC agents: ODP = 0; GWP = 1430 to 9810 [13]
Cost-Effectiveness	Varies from about 1 to about 2

6.2.2.3 *Dry Chemical*

Agent	Dry chemical
Efficacy	For use on Class A fires For use on Class B fires For use on fires involving electrified equipment Dry chemical applied to some electrical or sensitive equipment may cause damage otherwise not caused by a fire.
Toxicity	Low
Safety Characteristics	Pressurised containers
Environmental Characteristics	Low environmental risk
Cost-Effectiveness	~ 0.2

[13] IPCC 4th Assessment Report: Climate Change, 2007. 1.

6.2.2.4 *Water*

Agent	Water, straight stream , ~9 litre
Efficacy	Where approved for use on Class A fires, water-stream extinguishers should not be used on fires involving electrified equipment or that involve materials that are reactive with water (e.g. metals). Not suitable for Class B fires. Water applied to some electrical or sensitive equipment may cause damage otherwise not caused by a fire.
Toxicity	Non-toxic
Safety Characteristics	The possibility of electrocution if used on electrically energised equipment.
Environmental Characteristics	No significant risk
Cost-Effectiveness	~0.5

6.2.2.5 *Fine Water Spray*

Agent	Water, fine spray
Efficacy	For use on Class A fires including use on electrified equipment up to 10 kV. Not suitable for use on materials that are reactive with water (e.g. metals). Not suitable for Class B fires. Water applied to some electrical or sensitive equipment may cause damage otherwise not caused by a localised fire.
Toxicity	Non-toxic
Safety Characteristics	No adverse characteristics
Environmental Characteristics	No significant risk
Cost-Effectiveness	~0.6 (~9 litre extinguisher unit; cost index compared to a 10B-rated CO_2 unit)

6.2.2.6 *Aqueous Salt Solutions*

Agent	Aqueous salt solutions, fine spray
Efficacy	For use on Class A fires not involving electrified equipment or materials that are reactive with water (e.g. metals). Suitability for use on Class B fires depends on formulation and means of delivery. Used on cooking oil fires where nozzle design limits splatter of hot oil. Salt solutions may cause damage to some electrical equipment not otherwise damaged by fire.
Toxicity	Varies from low to moderate.
Safety Characteristics	pH usually basic varying from 8 to 13. Possible short-exposure skin irritation depending on duration of exposure if wetted with agent.
Environmental Characteristics	No significant risk
Cost-Effectiveness	~0.7 to 1 (~9 litre extinguisher unit; cost index compared to a 10B-rated CO_2 unit)

6.2.2.7 *Aqueous Film-forming Foam*

Agent	Aqueous film-forming foam (AFFF)
Efficacy	For use on Class A fires not involving electrified equipment or materials that are reactive with water (e.g. metals). For use on Class B fires.
Toxicity	Moderate.
Safety Characteristics	pH is approximately neutral, varying between about 6.5 and 8.
Environmental Characteristics	Uncontained run-off of agent poses risks of contamination of soil, streams, and rivers.
Cost-Effectiveness	~0.6 (~9 litre extinguisher unit; cost index compared to a 10B-rated CO_2 unit)

6.3 Response to Question 1(b)

6.3.1 Alternative total flooding agents under development for use in fixed systems

One chemical producer reports that significant progress has been made on a new, but as yet undisclosed, chemical agent. Physical, toxicological, and fire extinguishing properties have not yet been published. The chemical producer has an undetermined amount of additional work to complete in order to establish efficacy and approval under national and international standards.

6.3.2 Alternative local application agents under development for use in portable systems

6.3.2.1 FK–6–1–14, C7 fluoro-ketone blend

This substitute is a blend of two C7 isomers:

3-Pentanone, 1,1,1,2,4,5,5,5-octafluoro-2,4-bis(trifluoromethyl)- 813-44-5 (55 – 65%)
3-Hexanone, 1,1,1,2,4,4,5,5,6,6,6-undecafluoro-2-(trifluoromethyl)- 813-45-6 (35 – 45%)

Currently under review for use as a streaming agent in non-residential applications. Product approval program to be completed.

6.3.2.2 2-BTP, 2-Bromo-3,3,3-Trifluoropropene, CAS#: 1514-82-5

This substitute has been under study for more than ten years and its fire extinguishing characteristics are closer to halon 1211 than any other alternative so far developed.

Its environmental properties are: ODP ~ 0.003, GWP ~ 0.26

It is reported by one manufacturer that research on the efficacy of 2-BTP in some applications has looked sufficiently promising to continue development to achieve final approval.

Final performance research and toxicity testing remain to be completed.

For information on 2-BTP research see references.

6.4 Response to Question 1(c)

Every fire hazard is unique and needs to be assessed by a fire protection engineer or other competent person skilled in modern fire protection technologies. Previously when using ODS for fire protection applications, the agent choice was usually very simple; halons were the agent-of-choice for fixed flooding applications, as well as for local application and portable applications. Today, the user is faced with a wide range of potential fire protection options, and they need to make a choice in a logical, hierarchical manner.

Working through a logical decision process will lead the user to selection of a suitable ODS-alternative fire extinguishing agent and system. In some cases there will be a different “weighting” among the several requirements. In some regions of the world there are economic barriers to the adoption of environmentally-sound alternatives. There are, however, no other barriers to adoption of an environmentally sound alternative to an ODS fire extinguishing system.

Several environmentally sound alternatives to ODS fire extinguishing agents for both total flooding and local applications uses have been introduced to the market. If an environmentally sound alternative agent works in any specific application there is no barrier to its adoption other than economic considerations. New environmentally sound alternatives are presently under development that may increase the number of applications where environmentally sound alternatives are technically viable.

6.5 Response to Question 1(d)

The HTOC is of the opinion that it is not possible to report or even estimate values in response to the question posed.

The production of PFCs and HFCs for use in fire extinguishing systems and portable fire extinguishers as well as the production of alternatives (without negative environmental impacts) to these agents for uses in the same applications is performed by very few manufacturers, all of whom treat the information on their historical, present and projected production as proprietary. The required factual data is thus not available. So, without a clear understanding of these production levels for the alternatives without negative environmental impacts and also for the PFCs and HFCs, there is no basis for making a judgement about the overall utility of any alternatives in replacing PFCs and HFCs in the fire protection sector, and doing so may result in data that is misleading.

Regarding the PFCs, we can also say that the fire protection community has acted responsibly in dealing with what have turned out to be unsuitable alternatives from an environmental impact perspective. The subject of the use of PFCs was debated at the International Maritime Organization (IMO) over a three years period and in the end PFCs were prohibited in fire extinguishing systems on all merchant ship new builds. The IMO decision was based entirely on the availability of several HFCs that collectively could perform as well if not better than the PFCs in shipboard applications and at the same time present a more favourable environmental impact. The prohibition of PFCs by IMO led to the collapse of any demand for the agent as other major industries, e.g., oil and gas production, followed suit, and led to the manufacturer abandoning the products.

However, the need for chemical agents remains as inert gases, water mist and other agents are not suitable for many fire protection applications that had previously used halon. HFCs have filled that role and, since about 2005 a fluoroketone (FK) has increasingly become more accepted – cost was initially a barrier but its physical properties also make it unsuitable in some applications, e.g., aviation and use in very cold climates.

With respect to HFCs, as stated above, although specific production data has not been provided, according to one HFC producer, estimates for volumes sold 2008-2012 (see the following table), are reasonably accurate and the percent over that time frame, world-wide, is fairly constant ±3-5%. Note this is not GWP weighted or emissions, just raw tonnage sold globally.

Sector	Percentage
Refrigeration	68%
Foam Expansion	23%
Propellants	5%
Pharmaceutical	1.1%
Fire Protection	1.0%
Electronic Gases	0.3%
Cleaning	0.17%
Miscellaneous	1.43%

Unlike the other sectors, fire protection is highly regulated and there are design standards that have to be followed in consideration of life safety and property protection. As the agents are very valuable and are easily contained, recycling of HFCs in this sector is already mature.

The fire protection industry is still evaluating alternatives that have low environmental impacts. In addition, the Halons Technical Options Committee is assessing regional biases in fire protection agent, systems and costs across the spectrum of available choices, which may provide additional clarity on market penetration options for low environmental impact agents in the future.

6.6 Response to Question 1(e)

The use of HCFCs in fire protection is declining, with the only total flood agent being provided for the maintenance of legacy systems that are themselves phasing out. Only HCFC-123 is used in any quantity in portable extinguishers and if the development of 2-Bromo-3,3,3-trifluoropropene proves to be commercially successful, owing to its fire extinguishing characteristics being closer to halon 1211 and it having a low environmental impact, it would be the natural replacement for it and halon 1211 – particularly in the aviation industry.

7 Solvents

7.1 Introduction

This section provides the updated information on alternatives that are used for solvent applications to addresses the requirements of “Decision XXIV/7”, which is given in chapter 1.

Solvents are widely used as process agents in a variety of industrial manufacturing processes although they are not contained in the final products to consumers. The main applications of solvents are metal cleaning, electronics cleaning, precision cleaning. Then career solvents and heat transfer media have minor shares.

Among ODSs controlled by Montreal Protocol, CFC-113 and 1,1,1-trichloroethane (TCA) use as solvents were banned in both of Article-5 and non-Article 5 countries except one essential use exemption.

Several reports that describe the use of HCFCs in solvent applications have been published in the past. These include the IPCC TEAP Special Report, the TEAP Decision XXI/9 Task Force Report, XXIII/9 Task Force Report, and the Assessment Reports of CTOC and STOC.
Among ODSs controlled by Montreal Protocol, CFC-113 and 1,1,1-trichloroethane (TCA) use as solvents were banned in both of Article-5 and non-Article 5 countries except one essential use exemption.

The only HCFC solvents currently used are HCFC-141b and HCFC-225ca/cb with ODP of 0.11 and 0.025/0.033 and GWP-100yr of 713 and 120/586, respectively. Although HCFC-141b use as solvents in non-Article 5 countries was banned by 2010, its use in Article 5 countries may still be increasing. HCFC-225ca/cb has been used as drop-in replacement for CFC-113 in many cases, as it resembles CFC-113 in its chemical and physical properties. It is higher in cost compared to CFC-113 and the market for it seems to remain only in Japan and USA with consumption of the order of thousand metric tons level.

The elimination of HCFCs from solvent applications still leaves many options available. Many alternative solvents and technologies developed so far since 1980s are the candidates for HCFC alternatives, which include, not- in kind technologies such as aqueous cleaning, semi-aqueous cleanings, hydrocarbon and alcoholic solvents, and in-kind solvents such as chlorinated solvents, a brominated solvent, and fluorinated solvents with various levels of acceptance. However, no single option seems well suited to replace HCFCs completely.

The following terms, used in the tables below, have meanings as given.

<u>Efficacy</u> refers to suitability for solvent applications. It indicates merits of the agents in cleaning performances

<u>Toxicity</u> refers to Threshold Limit Value (TLV) or Occupational Exposure Limit (OEL). As solvents are usually used as process agent in the cleaning process, their toxicity concerns are mainly focused on the allowable exposure limit to those who works in the process.

<u>Safety characteristics</u> refer to flammability of agents. The flash point and the combustible range are also noted in in-kind solvents.

<u>Environmental characteristic</u> refers to ozone depletion potential (ODP) and GWP (100-year Global Warming Potential) or other characteristics, if applicable

<u>Cost effectiveness</u> refers to investment cost and solvent cost. Due to the wide variety of alternatives available to replace HCFCs, a full discussion of the costs of these alternatives is not practical. So the capital investment is roughly compares as one time cost and solvent cost is roughly compared as operating cost. Solvent cost is classified as shown below.

Solvent Cost ($/kg): A=~5, B=5~10, C=11~20, D=21~50, E=51~80

7.2 Response to Question 1(a)

7.2.1 Commercially available, technically proven alternatives for solvent cleanings

7.2.1.1 Not-in-kind alternatives

Aqueous cleaning

Agent	Water, surfactant, alkali/acidic agent , other additives
Efficacy	Applicable to wide range of materials and parts to be cleaned by choosing additives
Toxicity	Depend on additives
Safety Characteristics	Non flammable Corrosive when alkali or acidic agents are used
Environmental Characteristics	ODP: 0 GWP: 0 Waste water treatment is necessary
Cost Effectiveness* Investment cost Solvent cost	 Very large A-B

*May 2012 TEAP Task Force Report

Semi-aqueous cleaning

Agent	Glycol ethers/water, terpenes, Glycol ethers
Efficacy	Applicable to wide range of materials and parts to be cleaned
Toxicity	Low to moderate (depend on organic solvents used)
Safety Characteristics	Some organic solvents are flammable. Explosion proof equipments are necessary in the case.
Environmental Characteristics	ODP: 0 GWP: low Waste water treatment is necessary VOC
Cost Effectiveness* Investment cost Solvent cost	 Very large A~D

*May 2012 TEAP Task Force Report

These aqueous and semi-aqueous processes can be good substitutes for metal degreasing or even electronics and precision cleaning when corrosion of the materials is not an issue. The availability of good quality water and water disposal issues need to be taken care of, right from the start of the process conception. Some aqueous cleaning processes have a low environmental impact (no VOC, low GWP, no ODP) and a low toxicity. However, others involving additives may emit VOCs and use toxic and corrosive chemicals. Investment costs can be high but operating costs are generally lower than those with solvents alternatives.

Hydrocarbon solvent cleaning

Agent	n-Paraffin, iso-Paraffin, aromatic solvents
Efficacy	High solvency to oil and grease
Toxicity	Low to moderate (depend on solvents)
Safety Characteristics	Flammable: to avoid explosion, the solvents with high flash points (>55°C) are used. Explosion proof equipments are necessary
Environmental Characteristics	ODP: 0 GWP: low VOC
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Large A – C Difficult

*May 2012 TEAP Task Force Report

This process has proven to be a good solution with paraffin hydrocarbon formulations; cleaning is efficient but the non-volatile or less-volatile residues can be incompatible with some downstream manufacturing or finishes. Their environmental impact is low (low GWP, no ODP) but they are generally classified as VOC and emissions are subject to regulation. Their toxicity is also low. Owing to their combustibility (flashpoint > 55°C), they have to be used in open tank equipment at a temperature at least 15°C below their flashpoint.

Alcoholic solvents

Agent	iso-propyl alcohol (IPA)
Efficacy	High solvency to flux resin
Toxicity (TLV or OEL)	200 ppm
Safety Characteristics	Flammable Explosion proof equipments are necessary
Environmental Characteristics	ODP: 0 GWP: low VOC
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Large A Difficult

*May 2012 TEAP Task Force Report

These substances have been used for many years in cleaning applications. IPA is the most popular solvent. Their cost and environmental impact are low (low GWP and zero ODP), but they are classified as VOCs and may contribute to ground level ozone pollution. Also they require explosion proof equipment.

7.2.1.2 In-kind alternatives

Chlorinated solvents

Agent	Trichloroethylene	Tetrachloroethylene	Dichloromethane
Boiling point	87˚C	121˚C	40˚C
Efficacy	High solvency due to the presence of chlorine atom. Good to remove oil and grease. Incompatible with some materials		
Toxicity* TLV or OEL(USA)	10ppm	25ppm	50ppm
Safety Characteristics* Flash point Combustible range	 None 8-10.5[vol%]	 none none	 none 13-23[vol%]
Environmental Characteristics*	ODP:0.005 GWP:5 Lifetime: 13days	ODP:0.005 GWP:12 Lifetime: 0.3yrs	ODP:0.005 GWP:9 Lifetime: 0.38yrs
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Medium A Possible		

*May 2012 TEAP Task Force Report

The primary in-kind substitute for TCA has been the chlorinated alternatives such as trichloroethylene, tetrachloroethylene and methylene chloride. These substitutes have very small (0.005-0.007) ozone depletion potentials and are generally classed as zero-ODP. They have similar cleaning properties to TCA. Therefore, material compatibility of cleaned parts must be checked if HCFCs are replaced by these chlorinated solvents.

Brominated solvents

Agent	n-Propyl bromide
Boiling point	72˚C
Efficacy*	High solvency due to the presence of bromine atom. Good to remove oil and grease. Incompatible with some materials
Toxicity TLV or OEL(USA)*	(0.1ppm)
Safety Characteristics* Flash point Combustible range	 None None
Environmental Characteristics*	ODP: 0.0049-0.01 GWP: very low Lifetime: 20~25days
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Medium C Possible

*May 2012 TEAP Task Force Report

A brominated solvent, n-propyl bromide has been another alternative for TCA and CFC-113 because of its similar cleaning properties. However, there has been significant concern about the toxicity of n-propyl bromide. ACGIH proposed the reduction of the TLV for n-propyl bromide from 10 ppm to 0.1 ppm in February 2012. No additional information has been announced yet.

HFC solvents

Agent	HFC-43-10mee	HFC-365mfc	HFC-c447ef
Boiling point	55˚C	40˚C	82˚C
Efficacy*	Easy drying, good material compatibility due to their mild solvency		
Toxicity* TLV or OEL(USA)	200 ppm	1000 ppm**	120 ppm
Safety Characteristics* Flash point Combustible range	 None None	 ≤27˚C** 3.6~13.3 [vol%]**	 None None
Environmental Characteristics*	ODP: 0 GWP: 1640 Lifetime: 15.9yrs	ODP: 0 GWP: 794 Lifetime: 7.0yrs	ODP: 0 GWP: 250 Lifetime: 3.4yrs
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Medium C – E Possible		

*May 2012 TEAP Task Force Report
**Data were supplied by the manufacturers

Although HFCs are available in all regions, their uses have been primarily in non-Article 5 countries, due to relatively high cost and important demands in high tech industries. On account of increasing concern about their high GWP, uses are focused in critical applications for which there are no other substitutes. Therefore, growth is expected to be minimal.

HFE solvents

Agent	HFE-449s1	HFE-569sf1	HFE-64-13s1	HFE-347pc-f2
	61˚C	72˚C	98˚C	56˚C
Efficacy*	Easy drying, good material compatibility due to their mild solvency			
Toxicity* TLV or OEL(USA)	750ppm	200ppm	100ppm	50ppm
Safety Characteristics* Flash point Combustible range	 None None	 None 2.1~10.7[vol%]	 None None	 None None
Environmental Characteristics	ODP: 0 GWP: 297 Lifetime: 3.8yrs	ODP: 0 GWP: 59 Lifetime: 0.77yrs	ODP: 0 GWP: 210 Lifetime: 3.8yrs	ODP: 0 GWP: 580 Lifetime: 7.1yrs
Cost Effectiveness* Investment cost Solvent cost Retrofitting	 Medium D – E Possible			

*May 2012 TEAP Task Force Report

HFE (hydrofluoroether) is a new homologue of fluorinated solvents. All of these compounds are used as replacements for CFCs, HCFCs and are potential replacement for high GWP HFC solvents. The pure HFEs are limited in use in cleaning applications owing to their mild solvency. Therefore HFEs are usually used as azeotropic blends with other solvents such as alcohols and trans-1,2-dichloroethylene and in co-solvent cleaning processes giving them broader cleaning efficacy. The relatively high cost of these materials limits their use compared to lower cost solvents such as chlorinated solvents and hydrocarbons.

7.3 Response to Question 1(b)

7.3.1 Alternatives Under Development

7.3.1.1 Unsaturated solvents (HFOs and HCFOs)

Agent	HCFO-1233zd
Boiling point	19 ˚C
Efficacy	Easy drying, good material compatibility, good solvency to common soils
Toxicity TLV or OEL(USA)	300ppm**
Safety Characteristics** Flash point Combustible range	 None None
Environmental Characteristics***	ODP: 0.00024~0.00034 GWP: 4.7~7
Cost Effectiveness Investment cost Solvent cost Retrofitting	 Medium (C- D) Possible: chiller unit must be strengthened to minimise the emission.

*** Federal Register Volume 78, Number 32

Recently unsaturated fluorochemicals such as HFOs and HCFOs have been proposed. They are a new class of solvents specifically designed with a low atmospheric lifetime. The unsaturated molecules are known to be unstable in the atmosphere and therefore they show these low atmospheric lifetimes.

HFOs with zero ODP and ultra low GWP (<10) are being developed for the replacement of high GWP HFC and low or moderate GWP HFE solvents. They also could be candidates to replace HCFCs in certain solvent applications.

HCFO-1233zd (trans-1-chloro-3,3,3-trifluoropropene) is now announced for its commercial production. It has an atmospheric lifetime of less than one month and a (100 year) GWP smaller than 5. The ODP is negligibly small due to its very short atmospheric lifetime. Due to the balanced solvency, HCFO solvents are potential replacements for HCFCs and potential high GWP HFC solvents.

7.4 Response to Question 1(c)

7.4.1 Barrier and restrictions; the feasibility of options to HCFCs in solvents

The next three tables summarise the feasibility of the alternative solvents in metals cleaning (Table 7-1), electronics cleaning (Table 7-2) and precision cleaning (Table 7-3).

*Table 7-1: Metals cleaning *[1]*

	Classification	Chemical Name	Feasibility		Environmental Effect*[2]			Market Price*[3]
			Cleaning	Cost	GWP	ODP	Others	
ODS	Hydrochlorofluorocarbon	HCFC-225ca/HCFC-225cb	Good	Difficult	C	C	ODS	D
		HCFC-141b	Good	Good	C	D	ODS	C
Alternatives	Chlorinated solvents	Trichloroethylene Perchloroethylene Dichloromethane	Good	Good	A	B	VOC Water&Soil Pollutant	A
		trans-1,2-Dichloroethylene （Blending with other solvents）	Good	Good	A	B	VOC Water&Soil Pollutant	A-B
	Brominated solvents	n-Propyl bromide	Good	Good	A	B		C
	Fluorinated solvents	HFEs HFE-449s1 HFE-569sf1 HFE-347pcf2 (Blending with other solvents）	Difficult	Difficult	B-C	A		D-E
		HFCs HFC-43-10mee HFC-365mfc (Blending with other solvents）	Difficult	Difficult	C-	A		C-E
		Unsaturated Fluorocarbons(HFOs, HCFOs) HCFO-1233zd	Difficult to Good	Difficult	A	A		C-E
	Hydorocarbons	n-Paraffine, iso-Paraffin, Aromatic solvents	Good	Good	-	-	VOC Water&Soil Pollutant	A-C
	Siloxane	Methyl siloxanes	Good	Difficult	-	-		C-D
	Semi-aqueous	Glycol Ethers/Water Terpenes, Glycol Ethers/ Water	Good	Difficult to Good	-	-	Wastewater Treatment	A-D
	Alchoholic	iso-Propyl alcohol	Difficult	Good	-	-	VOC	A-B
	Aqueous	Basic, Neutral, and Acidic systems	Good	Difficult to Good	-	-	Wastewater Treatment	A-B
	Others	Supercritical fluids, Plasma cleaning, UV / Ozone irradiation	Difficult	Difficult	-	-	-	-

*1 Cleaning applications are classified according to the definition of SNAP (EPA /Significant New Alternatives Policy）
*2 Environmental Effect
GWP : A=~100 B=100~300, C=300~1000, D=1000~
ODP: A=~0.001, B=~0.01, C=~0.1, D=0.1~
*3 Market Price（May 2012 TEAP XXIII/9 Task Force Report)
Cost($/kg): A=~5, B=5~10, C=11~20, D=21~50, E=51~

Metal cleaning is removing contaminants such as cutting oils, grease, or metal fillings from metal parts. High solvency is required to solvents to remove such contaminants. The cleaning is generally cost sensitive because most of the metals to be cleaned are not so expensive. So the chlorinated solvents, brominated solvent and hydrocarbon solvents are widely used in this application.

*Table 7-2: Electronics Cleaning *[1]*

	Classification	Chemical Name	Feasibility		Environmental Effect*[2]			Market Price*[3]
			Cleaning	Cost	GWP	ODP	Others	
ODS	Hydrochlorofluorocarbon	HCFC-225ca/HCFC-225cb HCFC-141b (Blending with other solvents)	Good	Good	C	C-D	ODS	C-D
Alternatives	Chlorinated solvents	Trichloroethylene Perchloroethylene Dichloromethane	Difficult to Good	Good	A	B	VOC Water&Soil Pollutant	A
		trans-1,2-Dichloroethylene (Blending with other solvents)	Difficult to Good	Good	A	B	VOC Water&Soil Pollutant	A-B
	Brominated solvents	n-Propyl bromide	Difficult to Good	Good	A	B		C
	Fluorinated solvents	HFEs HFE-449s1 HFE-569sf1 HFE-347pcf2	Difficult	Good	B-C	A		D-E
		(Blending with other solvents)	Difficult to Good	Good				
		HFCs HFC-43-10mee HFC-365mfc	Difficult	Good	C-	A		C-E
		(Blending with other solvents)	Difficult to Good	Good				
		Unsaturated Fluorocarbons(HFOs, HCFOs) HCFO-1233zd	Difficult to Good	Good	A	A		C - E
	Hydorocarbons	n-Paraffine iso-Paraffin Aromatic solvents	Good	Good	-	-	VOC Water&Soil Pollutant	A-C
	Semi-aqueous	Glycol Ethers/Water Terpenes, Glycol Ethers/ Water	Good	Difficult to Good	-	-	Wastewater Treatment	A-D
	Alchoholic	iso-Propyl alcohol	Good	Good	-	-	VOC	A-B
	Aqueous	Basic, Neutral, and Acidic systems	Good	Difficult to Good	-	-	Wastewater Treatment	A-B
	Others	Supercritical fluids Plasma cleaning UV / Ozone irradiation	Good	Difficult to Good	-	-	-	-

*1 Cleaning applications are classified according to the definition of SNAP (EPA /Significant New Alternatives Policy)
*2 Environmental Effect
GWP : A=~100 B=100~300, C=300~1000, D=1000~
ODP: A=~0.001, B=~0.01, C=~0.1, D=0.1~
*3 Market Price (May 2012 TEAP XXIII/9 Task Force Report)
Cost($/kg): A=~5, B=5~10, C=11~20, D=21~50, E=51~

Electronics cleaning is removing contaminants, primarily solder flux residues, from electronics or circuit boards. Milder solvency is required in this cleaning so that the parts to be cleaned may not be damaged during the process. In the case of HFCs and HFEs, blending with other solvents is commonly applied to enhance the solvency.

Table 7-3: Precision cleaning *[1]

	Classification	Chemical Name	Feasibility		Environmental Effect*[2]			Market Price*[3]
			Cleaning	Cost	GWP	ODP	Others	
ODS	Hydrochlorofluorocarbon	HCFC-225ca/HCFC-225cb HCFC-141b	Good	Good	C	C-D	ODS	C-D
Alternatives	Chlorinated solvents	Trichloroethylene Perchloroethylene Dichloromethane	Difficult to Good	Good	A	B	VOC Water&Soil Pollutant	A
		trans-1,2-Dichloroethylene (Blending with other solvents)	Difficult to Good	Good	A	B	VOC Water&Soil Pollutant	A-B
	Brominated solvents	n-Propyl bromide	Difficult to Good	Good	A	B		C
	Fluorinated solvents	HFEs HFE-449s1 HFE-569sf1 HFE-347pcf2 (Blending with other solvents)	Good	Good	B-C	A		D-E
		HFCs HFC-43-10mee HFC-365mfc (Blending with other solvents)	Good	Good	C-	A		C-E
		Unsaturated Fluorocarbons(HFOs, HCFOs) HCFO-1233zd	Good	Good	A	A		C-E
	Hydorocarbons	n-Paraffine iso-Paraffin Aromatic solvents	Difficult	Good	-	-	VOC Water&Soil Pollutant	A-C
	Semi-aqueous	Glycol Ethers/Water Terpenes, Glycol Ethers/ Water	Good	Good	-	-	Wastewater Treatment	A-D
	Alchoholic	Iso-Propyl alcohol	Good	Good	-	-	VOC	A-B
	Aqueous	Basic, Neutral, and Acidic systems	Good	Good	-	-	Wastewater Treatment	A-B
	Others	Supercritical fluids Plasma cleaning UV / Ozone irradiation	Good	Difficult to Good	-	-	-	-

*1 Cleaning applications are classified according to the definition of SNAP (EPA /Significant New Alternatives Policy)
*2 Environmental Effect
GWP : A=~100 B=100~300, C=300~1000, D=1000~
ODP: A=~0.001, B=~0.01, C=~0.1, D=0.1~
*3 Market Price (May 2012 TEAP XXIII/9 Task Force Report)
Cost($/kg): A=~5, B=5~10, C=11~20, D=21~50, E=51~

Precision cleaning is cleaning to a specific grade of cleanliness in order for products to maintain their value. Generally the solvent cost is not an issue because the cleaning performance is quite important rather than the cost performance in this cleaning. Depending on the required cleanliness level, materials used in the cleaned parts, the shape of cleaned parts, wide variety of solvents can be the alternative candidates to HCFCs.

Although the conversion of HCFCs to alternative solvents has been taken place steadily in each application, the following should be considered when replacing HCFCs.

In the case of not in-kind solvent cleanings, some conversion to aqueous cleaning is likely but there are limits to its use because some products/processes simply can’t tolerate water. There is also the additional requirement that an aqueous cleaning step be followed by a drying step which can be energy-intensive and need more floor space.

Hydrocarbons and alcohols are effective solvents but are extremely flammable. Engineering controls, some of which are costly, can reduce the risk but flammability concerns may constrain growth. Additionally, most of the commonly used hydrocarbons are VOCs, which may further constrain growth in some countries.

As for in-kind solvents, chlorinated solvents will be available as replacements for HCFCs in a variety of cleaning applications owing to their high solvency. However, large-scale conversions to chlorinated solvents would seem unlikely because of toxicity concerns. Those solvency powers are more aggressive than those of HCFCs. Therefore material compatibility should be evaluated carefully when HCFCs are replaced by chlorinated solvents.

n-PB is an effective and useful solvent but widespread growth in its use would seem unlikely because of toxicity concerns. ACGIH announced the reduction of the TLV for n-propyl bromide from 10ppm to 0.1ppm in February 2012.

HFC and HFEs are also good candidates for the replacement for HCFCs. Due to their mild solvency, however, some modification may be necessary when HCFCs are replaced by HFCs and HFEs. All of HFCs and HFEs have zero ODP. Their GWP values vary depending on their structures. The relatively high cost of these materials limits their use.

Furthermore, unsaturated HFCs and HCFCs (HFOs and HCFOs) are also stated to be under development for the replacement of high GWP HFC and low or moderate GWP HFE solvents. Both HFOs and HCFOs have ultra low GWPs. HFOs also could be candidates to replace HCFCs in certain solvent applications. HCFO-trans-1233zd has a high solvency with common soils and may be used as a direct replacement for HCFCs. The relatively high cost of these materials would limit their use.

7.5 Response to Question 1(d)

The CTOC is of the opinion that it is not possible to report or even estimate values in response to the question posed. However, it should be noted that more than 90% of the ODS solvent use has been reduced already through conservation and substitution with not-in-kind technologies.

7.6 Response to Question 1(e)

Recently unsaturated fluorochemicals such as HFOs and HCFOs have been proposed. They are a new class of solvents specifically designed with a low atmospheric lifetime. The unsaturated molecules are known to be unstable in the atmosphere and therefore they show these low atmospheric lifetimes. Among them, HCFOs are unique in their balanced solvency due to the presence of chlorine and fluorine atom in the molecule. If HCFOs with appropriate boiling points, low toxicity and enough stability to the practical use be on market, they may replace HCFCs totally.

8 Dealing with what can be avoided in the period to 2020

8.1 What can be avoided in future – Refrigeration and Air Conditioning

8.1.1 Introduction and methodology

Chapter 2 gives an adequate overview of the approaches that can be applied in the RAC and foams sectors for the calculation of the amounts with negative environmental impact that could have been and the amounts that can be avoided.

In the case of refrigeration and air conditioning, one has to deal with a number of subsectors and sub-subsectors, each having a number of ODS alternatives in the different sub-subsectors. The fact that each of these alternatives is applied with a certain preference in specific equipment (and again often under certain conditions), this combined with the fact that the amounts in banks (present in the equipment) need recharging (i.e., servicing) over their lifetime (which is assumed to be 15 years) substantially complicates all matters for the calculations of Negative Environmental Impact. It implies that it is in fact impossible to go back to 1990 and look at the amounts that could have been avoided. In that case one would have to define a starting point (i.e., the year 1990) where there is still a large amount of equipment (the installed base) in operation from the period 1975-1990, which will have a large impact on the refrigerant needs for servicing (integrated in tonnes and in carbon dioxide equivalent units). This is not dependent on whether one selects certain alternatives in whatever RAC subsectors in the years after 1990. It is for this reason, that for the RAC sector, it has been decided to not further go into the determination of amounts with negative environmental impact that could have been avoided.

A BAU case (or scenario) for the calculation of consumption and emissions (banks) has been chosen as published by Clodic and co-workers (RTOC, 2010; UNEP, 2009). This BAU case covers the period 1990-2015 and considers all subsectors (and sub-subsectors) of refrigeration and air conditioning. It also considers the application of ODS, well as the application of ODS replacements, such as HFCs and other refrigerants (including low GWP refrigerants) after a certain starting point in time (dependent on the type of country, i.e., Article 5 or non-Article 5, and dependent on the specific refrigerant).

For this study, the BAU case referred to above has been expanded towards 2020, so that the various amounts (of different refrigerants) consumed in new manufacture and in servicing can be calculated for the entire period 2013-2020 (low amounts of low GWP refrigerants have been taken into consideration until 2013, a significant uptake is assumed as of the year 2013).

The best way to calculate all the amounts with negative environmental impacts that can be avoided as of the year 2013, would be to consider all subsectors and sub-subsectors and all possible (or available) refrigerants. However, this would lead to an enormous amount of modelling, since the construction of Excel work-sheets to go through the specific refrigerant issues for one subsector would already cost several days for a real expert. It has therefore been decided to look in a first instance at the two main important subsectors where a change from HCFCs to high GWP HFCs or other alternatives is taking place, without that any conversion in manufacture or in products (retrofits) from high GWP HFCs to lower GWP refrigerants is being considered.

Of course, the change from HFC-134a to low GWP substances in the subsectors mobile air conditioning and domestic refrigeration is important.

However, the size of the domestic refrigeration subsector is not too big and it could be left out at this stage; furthermore, it does not concern the phase-out of ODS in this subsector (but is related to the consequences of the ODS phase-out), which raises the question whether it should be addressed in this report. The size of the mobile air conditioning subsector is substantial where it concerns the use of refrigerant. This would certainly merit further study. However, also in the MAC subsector it does not concern a direct ODS phase-out process (but it is again related to the consequences of the ODS phase-out), which poses again the question in how far this subsector should be considered in this report. The aforementioned argument forms the reason why the amounts with negative environmental impact that could be avoided in the MAC subsector have been studied for this report but are only given in order to get an impression of the magnitudes involved in the MAC subsector compared to the subsectors stationary air conditioning and commercial refrigeration.

Looking at the consumption, the banks and the emissions, the size of the transport refrigeration subsector is in the range of 1-3% of the two subsectors commercial refrigeration and stationary air conditioning combined. The large size (industrial) refrigeration sector may be in the order of up to 5% of the two sectors commercial refrigeration and stationary air conditioning, but this would still be relatively small. Given the fact that the results of calculations, based on assumptions to be made, in the two main subsectors will definitely have uncertainties larger than 5%, it has been decided to not take into account the subsectors transport and large size refrigeration in this report. It then results in the consideration of two subsectors, the first one being commercial refrigeration with a number of sub-subsectors, each with specific refrigerants and alternative refrigerants, and the second one being stationary air conditioning.

The calculations have been done in such a manner that for the period 1990-2020 all the necessary refrigerants have been considered, which can be grouped as CFCs, HCFCs and HFCs and other alternatives (in essence, being the lower GWP alternatives). Assuming a certain servicing percentage of 15%, the amounts necessary in new manufacture and servicing were calculated for the entire 1990-2020 period (one has to realise that what happens in the year 2013 is a consequence of which bank of refrigerants in equipment has been built up between the 1990s and 2013 (dependent on the lifetime of the equipment). The calculations as mentioned above will result in amounts of especially HCFCs, high-GWP HFCs as well as lower GWP alternatives, in particular for the period 2013-2020.

Targets have been set (based upon best estimates by experts and Task Force members) for the penetration rate in the new manufacture of products using different ODS alternatives in the two subsectors, all expressed in percentages. In modelling, the penetration rate of the different alternatives is then assumed to grow (or decrease) with a certain percentage per year, in this way reaching a pre-set percentage for the year 2020. Values are assumed to be different for Article 5 and non-Article 5 countries as given below for the two subsectors concerned.

It should be mentioned here that the BAU case shows growth over the entire 2013-2020 period considered, i.e., the assumed economic growth. The calculations made for Article 5 and non-Article 5 countries assume different growth percentages for each group, i.e., for non-Article 5 countries 4.2% and 4.9% and for Article 5 countries 7.9% and 13.0% in stationary air conditioning and commercial refrigeration, respectively).

The output that is important is the amount of tonnes of all non- HCFCs (i.e., HFCs having a low GWP and a high GWP, plus other low GWP alternatives) used in new manufacture over the period 2013-2020. In this way one can calculate the amounts in tonnes that can be avoided in future (this is in fact the amount of high GWP HFCs that can be avoided), and this amount could also be expressed in tonnes CO_2 equivalent, looking at the mix of lower GWP alternatives that is supposed to enter the new manufacture process. The numbers for the servicing amounts automatically follow from this calculation via the calculation of banks, which determines the servicing amounts. The introduction of lower GWP alternatives in new manufacture (i.e., in new products) will decrease the amounts of high GWP substances involved in servicing (these are again amounts that can be avoided). For the ease of doing the calculations, the servicing percentages of equipment with different refrigerants are assumed to be the same.

8.1.2 Stationary air conditioning

The percentage values set for the penetration of the various refrigerants in the year 2020 are as follows

Table 8-1: Percentage penetration of the different refrigerants assumed in the year 2020

Country type/ Refrigerant type	Low GWP (HCs, HFCs, CO_2, etc.) with GWP < 150	HFC-32 and blends with GWP < 750	HFC-134a, R-407C, R-410A (and similar)	HCFC-22
Article 5	10	20	40	30
Non-Article 5	10	15	75	0

In tonnes the following can be shown for both manufacture and servicing in both non-Article 5 and Article 5 countries

8.1.2.1 Non-Article 5 countries

Table 8-2: Consumption in ktonnes for the different types of refrigerants in non-Article 5 countries for the period 2013-2020, for stationary air conditioning

	New manufacture				**Manufacture plus servicing**			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-Natives	Total
2015	0	90.9	10.2	101.1	23.9	141.1	10.2	175.4
2020	0	81.9	27.3	109.2	10.7	157.8	38.0	206.5
Aggr. 13-20	0	705.9	122.9	828.7	159.6	1171.0	151.0	1481.7

The table above shows that in the year 2020, 38 ktonnes of high GWP substances can be avoided via lower GWP substances, which is 18.4% of the total in ktonnes. Integrated over the period 2013-2020, the percentage that can be avoided would be 10.2% (151 ktonnes in the total of 1480 ktonnes).

Table 8-3: Consumption in Mt CO_2-eq for the different types of refrigerants in non-Article 5 countries for the period 2013-2020, for stationary air conditioning

	New manufacture				**Manufacture plus servicing**			
Year/ Substance	HCFC	HFC	Alter-Natives	Total	HCFC	HFC	Alter-Natives	Total (no alternatives)*
2015	0	180.9	4.7	185.6	42.7	276.8	4.7	**324.2 (324.1)**
2020	0	165.1	12.6	177.7	19.1	310.6	17.5	**347.2 (404.6)**
Aggr. 13-20	0	1409	57	1466	286	2297	69	**2652 (2879)**

Note: numbers in parentheses give the amounts in case no alternatives with lower GWP would be considered, a sort of base case

In a first instance the totals have to be calculated as if no change to alternatives would take place (no amounts avoided, result in parentheses); a second result is the one with the use of lower GWP alternatives (right column, number without parentheses).

In the year 2020, 57.4percentage t Mt CO_2-eq. can be avoided (in a total of 405 Mt CO_2-eq.). This amounts to 14.2% of the total negative environmental impact. Aggregated over the period 2013-2020, the hat can be avoided would be 7.9% (difference of 227 Mt in a total of 2879 Mt CO_2-eq.).

8.1.2.2 Non-Article 5 countries

Table 8-4: Consumption in ktonnes for the different types of refrigerants in Article 5 countries for the period 2013-2020, for stationary air conditioning

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total
2015	173.7	77.4	25.3	276.4	330.7	78.7	25.3	434.7
2020	67.5	90.0	67.5	225.0	245.2	92.1	94.1	431.3
Aggregated 2013-20	1134.4	649.8	303.8	2088.0	2440.9	661.8	373.3	3476.1

The table above shows that in the year 2020, 94 ktonnes of high GWP substances can be avoided via lower GWP substances which is 21.8% of the total in ktonnes. Aggregated over the period 2013-2020, the percentage that can be avoided would be 10.7% (373 ktonnes in the total of 3476 ktonnes).

Table 8-5: Consumption in Mt CO_2-eq for the different types of refrigerants in Article 5 countries for the period 2013-2020, for stationary air conditioning

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	310.8	153.1	12.9	476.8	591.9	155.1	12.9	**759.9 (796.9)***
2020	120.8	177.9	34.3	333.0	438.8	181.4	47.8	**668.1 (805.4)**
Aggregated 2013-20	2031	1284	154	3469	286	2297	69	**5863 (6409)**

Note: numbers in parentheses give the amounts in case no alternatives with lower GWP would be considered, a sort of base case

In a first instance the totals have to be calculated as if no change to alternatives would take place (no amounts avoided); a second result is the one with the use of lower GWP alternatives (right column).

In the year 2020, 37 Mt CO_2-eq. can be avoided (in a total of 797 CO_2-eq.). This amounts to 4.6% of the total negative environmental impact. Aggregated over the period 2013-2020, the percentage that can be avoided would be 8.5% (546 Mt in a total of 6409 Mt CO_2-eq.).

8.1.2.4 All countries

Table 8-6: Consumption in ktonnes and in Mt CO_2-eq for the different types of refrigerants in all countries for the period 2013-2020, for stationary air conditioning

	Total consumption (ktonnes)				Total consumption (Mt CO_2-eq)			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	354.6	220.0	35.6	610.1	634.6	431.9	17.6	**1084.1 (1136.3)**
2020	255.8	249.9	132.1	637.9	457.9	492.0	65.3	**1015.3 (1113.9)**
Aggregated 2013-20	2600.6	1832.8	524.3	4957.8	4655	3601	259	**8515 (9288)**

Looking at the sum of the numbers for both Article 5 and non-Article 5 countries, the following can be mentioned.

In the year 2020, 99 Mt CO_2-eq. can be avoided in a total of about 1114 Mt CO_2-eq. This amounts to 8.9% of the total negative environmental impact. Aggregated over the period 2013-2020, the percentage that can be avoided would be 8.3% (773 Mt CO_2-eq. in a total of 8883 Mt CO_2-eq.).

8.1.3 Commercial refrigeration

Rather than looking at commercial refrigeration as one subsector, one should first study the sub-subsectors stand-alone products, condensing units and larger supermarkets. Using market shares in the total for the three sub-subsectors and penetration percentages for lower GWP alternatives in each of these subsectors, one can calculate the penetration percentages for the year 2020 for the different refrigerants for both Article 5 and non-Article 5 countries.

Table 8-7: Market shares of the three sub-subsectors in commercial refrigeration

	Stand alone products	Condensing units	Large supermarkets
Article 5	7	47	46
Non-Article 5	10	50	40

Table 8-8: Percentage penetration of the different refrigerants in the year 2020 (Article 5)

	Low GWP (HCs, HFCs, CO_2, etc.) with GWP < 150	HFC-32 and blends with GWP < 750	HFCs	R-404A/507	HCFC-22
Stand-alone	40	0	60	0	0
Condensing units	10	0	40	10	40
Large supermarkets	20	0	30	10	40

Table 8-9: Percentage penetration of the different refrigerants in the year 2020 (non-Article 5)

	Low GWP (HCs, HFCs, CO_2, etc.) with GWP < 150	HFC-32 and blends with GWP < 750	HFCs	R-404A/507	HCFC-22
Stand-alone	60	10	30	0	0
Condensing units	10	15	75	0	0
Large supermarkets	30	10	60	0	0

Table 8-10: Percentage penetration of the different refrigerants in the year 2020

Country type/ Refrigerant type	Low GWP (HCs, HFCs, CO_2, etc.) with GWP<150	HFC-32 and blends with GWP<750	HFCs	R-404A/507	HCFC-22
Article 5	20	5	30	10	35
Non-Article 5	30	15	55	0	0

In tonnes the following can be shown for both manufacture and servicing in both Article 5 and non-Article 5 countries.

8.1.3.1 Non-Article 5 countries

The table below shows that in the year 2020, 23 ktonnes of high GWP substances can be avoided via the use of lower GWP substances, which is 34% of the total in ktonnes. Aggregated over the period 2013-2020, the percentage that can be avoided would be 20.2% (97 ktonnes in the total of 480 ktonnes).

Table 8-11: Consumption in ktonnes for the different types of refrigerants in non-Article 5 countries for the period 2013-2020, for commercial refrigeration

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC [R-404A etc]**	Alter- Natives	Total	HCFC	HFC [R-404A etc]	Alter- natives	Total
2015	0	9.2 [9.3]**	6.3	24.7	3.0	9.9 [36.2]	7.1	56.1
2020	0	19.8 [0]	16.2	36.0	0.7	21.8 [22.8]	23.4	68.7
Aggregated 2013-20	0	98.8 [52.3]	73.9	22.4	18.7	107.6 [257.2]	97.0	480.6

**Note: the number in square brackets denotes the (separate) amount of R-404A and R-507; the total of HFCs is the sum of the number outside the square brackets plus the number inside

The table above shows that in the year 2020, 23 ktonnes of high GWP substances can be avoided via lower GWP substances, which is 34% of the total in ktonnes. Integrated over the period 2013-2020, the percentage that can be avoided would be 20.2% (97 ktonnes in the total of 480 ktonnes).

Table 8-12: Consumption in Mt CO_2-eq for the different types of refrigerants in non-Article 5 countries for the period 2013-2020, for commercial refrigeration

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC [R-404A]	Alter- natives	Total	HCFC	HFC [R-404A]	Alter- natives	Total (no alternatives)
2015	0	12.5 [34.6]	1.6	48.7	5.6	13.5 [134.1]	1.6	**154.8 (175.9)**
2020	0	27.1 [0]	4.3	31.4	1.2	29.9 [84.7]	6	**121.8 (259.3)**
Aggregated 2013-20	0	135 [194]	19	348	35	147 [954]	23	**1160 (2348)**

In the year 2020, 137.5 Mt CO_2-eq. can be avoided (in a total of 259 Mt CO_2-eq.). This amounts to 53% of the total negative environmental impact. Integrated over the period 2013-2020, the percentage that can be avoided would be 50.6% (1188 Mt in a total of 2348 Mt CO_2-eq.). The percentages are huge because the amounts of R-404A are being phased out via the use of low GWP alternatives, plus that HCFC new manufacture is zero and servicing amounts of HCFC-22 are decreasing.

8.1.3.2 Article 5 countries

Table 8-13: Consumption in ktonnes for the different types of refrigerants in Article 5 countries for the period 2013-2020, for commercial refrigeration

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC [R-404A etc]	Alter- natives	Total	HCFC	HFC [R-404A etc]	Alter- natives	Total
2015	42.3	17.9 [15.3]	11.7	87.2	154.2	18.5 [25.7]	11.7	210.2
2020	43.8	37.5 [12.5]	31.3	125.0	194.8	39.6 [29.7]	43.6	307.7
Aggregated 2013-20	342.0	190.2 [115.8]	140.6	788.4	1330.9	198.8 [215.1]	172.9	1917.7

The table above shows that in the year 2020, 44 ktonnes of high GWP substances can be avoided via the use of lower GWP substances which is 14.2% of the total in ktonnes. Integrated over the period 2013-2020, the percentage that can be avoided would be 9% (173 ktonnes in the total of 1918 ktonnes).

Table 8-14: Consumption in Mt CO_2-eq for the different types of refrigerants in Article 5 countries for the period 2013-2020, for commercial refrigeration

	New manufacture				Manufacture plus servicing			
Year/ Substance	HCFC	HFC [R-404A etc]	Alter-natives	Total	HCFC	HFC [R-404A etc]	Alter-natives	Total (no alternatives)
2015	75.7	24.5 [56.7]	2	158.9	276.1	25.4 [95.1]	2	**398.6 (428.6)**
2020	78.3	51.4 [46.3]	5.3	181.3	348.8	54.2 [110.1]	7.4	**520.5 (616.4)**
Aggregated 2013-20	612	261 [429]	24	1326	2382	272 [797]	29	**3480 (3898)**

In the year 2020, 96 Mt CO_2-eq. can be avoided (in a total of 616 Mt CO_2-eq.). This amounts to 15.6% of the total negative environmental impact. Integrated over the period 2013-2020, the percentage that can be avoided would be 10.7% (417 Mt in a total of 3898 Mt CO_2-eq.).

The amounts that can be avoided, expressed in Mt CO_2-eq. are very sensitive to whether or not HCFC and HFC servicing amounts slowly decrease (from earlier new manufacture, just before 2013) during the period 2013-2020, whilst on the other hand the amount of penetration of lower GWP alternatives (expressed in percentage penetration) slowly increases as well.

8.1.3.3 All countries

Table 8-15: Consumption in ktonnes and in Mt CO_2-eq for the different types of refrigerants in all countries for the period 2013-2020, for commercial refrigeration

	Total consumption (ktonnes)				Total consumption (Mt CO_2-eq)			
Year/ Substance	HCFC	HFC [R-404A]	Alter-natives	Total	HCFC	HFC [R-404A]	Alter-natives	Total (no alternatives)
2015	157.3	28.4 [61.8]	18.8	266.2	281.7	38.9 [229.2]	3.6	**553.4 (604.4)**
2020	195.5	61.4 [52.5]	66.9	376.4	350	84.1 [194.8]	13.4	**642.3 (875.6)**
Aggregated 2013-20	1349.7	306.3 [472.3]	269.9	2398.3	4655	3601	259	**4640 (6245)**

When taking the amounts to be avoided in Mt CO_2-eq. from the table above, the percentage savings in the total is slightly more than 25% for the year 2020. It also is slightly more than 25% for the integrated amounts to be avoided over the period 2013-2020. This results from the combination of the high number for the amounts that can be avoided in non-Article 5 countries, combined with the lower percentages for the amounts that can be avoided in the total in Article 5 countries.

8.1.4 Both subsectors together

Looking at both subsectors (stationary air conditioning and commercial refrigeration), the total amounts can be calculated from the two summary tables (Tables 8-6 and 8-15), which are given once more below.

In the case of commercial refrigeration the amounts of HFCs and the amounts of high GWP blends (R-404A and R-507) have been taken together, so that the amounts are comparable between the two subsectors and can be added to form totals. It should once more be realised that here, it concerns amounts, amounts in Mt CO_2-eq. and percentages that are derived for a certain scenario with a number of assumptions:

- a certain consumption pattern during the period 1995-2012 for the subsectors
- a certain consumption pattern in separate Article 5 and non-Article 5 countries, which determines the specific starting point of 2012 (in tonnes for the various refrigerants in the various subsectors)
- a conservative servicing percentage (of the existing bank) of 15% per year
- an economic growth (and an extrapolated economic growth) taken from percentages over the period 2005-2012 (for separate countries or separate groups of countries)

The two tables are given once more below, as well as a summary table.

Table for all countries, stationary air conditioning

	Total consumption (ktonnes)				**Total consumption (Mt CO_2-eq)**			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)*
2015	354.6	220.0	35.6	610.1	634.6	431.9	17.6	**1084.1 (1136.3)**
2020	255.8	249.9	132.1	637.9	457.9	492.0	65.3	**1015.3 (1113.9)**
Aggregated 2013-20	2600.6	1832.8	524.3	4957.8	4655	3601	259	**8515 (9288)**

Table for all countries, commercial refrigeration

	Total consumption (ktonnes)				**Total consumption (Mt CO_2-eq)**			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	157.3	90.2	18.8	266.3	281.7	268.1	3.6	**553.4 (653.4)**
2020	195.5	114.0	66.9	376.4	350.0	278.9	13.4	**642.3 (875.6)**
Aggregated 2013-20	1349.7	778.7	269.9	2398.3	2417	2170	53.0	**4640 (6245)**

	Total consumption (ktonnes)				**Total consumption (Mt CO_2-eq)**			
Year/ Substance	HCFC	HFC	Alter-natives	Total	HCFC	HFC	Alter-natives	Total (no alternatives)
2015	511.8	310.2	54.3	876.3	916.3	700.0	21.2	**1637.5 (1740.7)**
2020	451.4	363.9	199.1	1014.3	807.9	770.9	78.7	**1657.6 (2085.7)**
Aggregated 2013-20	3950.3	2611.5	794.2	7356.0	7072	5771	312	**13155 (15533)**

* Note; the amounts given in parentheses are the ones without using (lower GWP) alternatives

Table 8-16: Total consumption for the various chemicals (in ktonnes and Mt CO_2-eq.) for the subsectors stationary air conditioning and commercial refrigeration, for all countries (derived from 2 subtables above)

Looking at the totals for 2020 it can be observed that for the BAU case considered

- stationary air conditioning is twice as large as commercial refrigeration in ktonnes
- stationary air conditioning is 30% larger than commercial refrigeration without the application of lower GWP alternatives, is about 50% larger with the application of lower GWP alternatives

Looking at the aggregated values it can be observed that

- stationary air conditioning is about twice as large in ktonnes, about 50% larger in Mt CO_2-eq. if commercial refrigeration would apply HFCs
- stationary air conditioning would (again) be twice as large in Mt CO_2-eq. if a large amount of lower GWP alternatives would be used instead of the refrigerants R-404A and R-507.

In total, for all countries, for both new manufacture and servicing, 794 ktonnes can be avoided during the period 2013-2020, which is 11% of the total (7356 ktonnes). During that same period 2378 Mt CO_2-eq. can be avoided, which is more than 15% of the total.

It should be realised that these numbers are derived for 15% servicing. Should this percentage be substantially higher, the amounts that can be avoided calculated in percentages would decrease. This could be a subject for a more detailed scenario analysis.

In mobile air conditioning, replacements of HFC-134a by lower GWP chemicals have been studied as of the 1990's, when there was still CFC-12 use, in particular in Article 5 countries (RTOC, 2010). Assuming that the use of CFC-12 has stopped, that all vehicles use HFC-134a, assumptions can be made on the penetration of low GWP alternatives in the year 2020. As an example, 80% penetration of low GWP alternatives has been assumed for non-Article 5 countries, 20% penetration for Article 5 countries. Growth has been assumed for the MAC subsector, i.e., 2.2% per year in non-Article 5 countries and 12.3% per year in Article 5 countries. To a certain degree, the servicing amounts will again determine the percentage of the amounts that can be avoided.

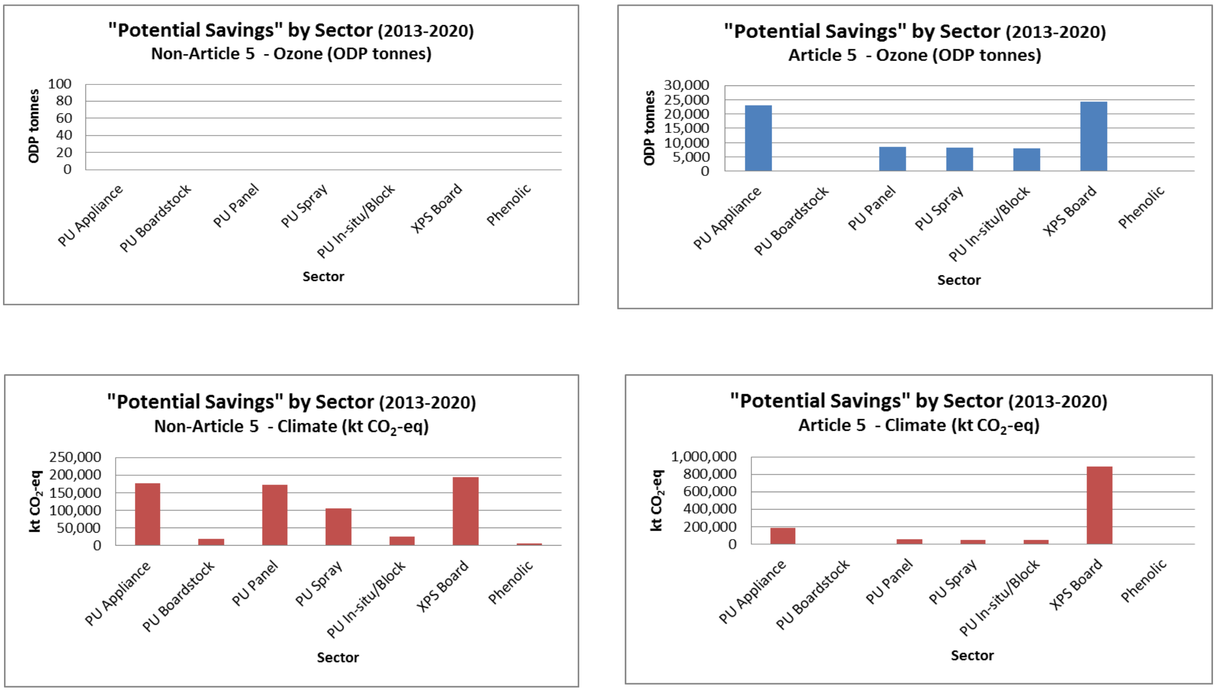
Aggregated for the period 2013-2020, for all countries, 184 ktonnes can be avoided from a total of 1304 ktonnes, which equals 14%. Expressed in Mt CO_2-eq. for that same period, 247 Mt CO_2-eq. can be avoided from a total of 1791 Mt CO_2-eq., which is 13.8% (the numbers should be more or less the same, since it only concerns amounts of HFC-134a that can be avoided, by a mix of low GWP alternatives, which give a very small contribution in Mt CO_2-eq.). It should be emphasised here that the percentage of the amount that can be avoided for non-Article 5 countries would be higher than for Article 5 countries (17% vs. about 10%, in Mt CO_2-eq., aggregated over 2013-2020).

An important observation is that the total amount aggregated over the period 2013-2020 would be 1304 ktonnes for MAC (and 1791 Mt CO_2-eq.), compared to 7356 ktonnes (and 15533 Mt CO_2-eq.). It shows that the stationary air conditioning and commercial refrigeration sectors are 5-9 times larger than the MAC sector (dependent on whether in ktonnes or in Mt CO_2-eq., under the current scenario for penetration and servicing percentages. It needs mentioning again that all amounts and percentages mentioned above are indicative, given the fact that it concerns a forecast for the subsectors considered, with estimates made (on the basis of historic knowledge) for a number of parameters.

8.2 What can be avoided in future – Foams

Moving forward to assess the potential for further savings, the period of assessment has been limited to 2013-2020 in view of the uncertainties surrounding market growth in the foam sector beyond that date. However, it should be noted that the potential savings will be under-estimated by taking this relatively cautious approach. The following four charts show the potential savings available assuming an immediate transition in 2013. While recognising that this is not possible in most cases, it does compensate to some extent for the relatively short assessment period:

Figure 8-1: Potential "Savings" achievable by adopting most favourable options (2013-2020)



Again, it should be noted that, although these savings are assumed to remove all of the remaining ozone and climate impacts for the period 2013-2020, the ozone-related incremental savings represent only 2.3% of the footprint that would have existed without the Montreal Protocol. Similarly, the removal of the remaining climate impacts only represents 13.3% of the climate footprint that would have existed without the Montreal Protocol.

With HCFC Phase-out Management Plans now well into their first phase, it is clear that most of the significant sectors identified in Article 5 Parties are already being addressed. However, this is not necessarily the case in non-Article 5 Parties where the drivers for further transition need to come from the climate agenda, bearing in mind that the phase-out of ozone-depleting substances is already complete. Apart from regulatory intervention, one of the key drivers may ultimately be the improvement in thermal efficiency offered by low-GWP substitutes such as unsaturated HFCs, unsaturated HCFCs or blends containing them.

It is clear that the timing of further transitions is less critical to the environment than was the case for CFC phase-out, where delay had substantial consequences. There are still some difficult transitions to address (e.g. in the XPS sector) and it may be that waiting for the maturing of emerging technologies will offer better long-term solutions than forcing the transition too soon. Where this is unavoidable because of ODS phase-out commitments, it may still be better to consider a low-cost interim solution in order allow for a subsequent transition.

Table 8-17: Projected per-cent of high GWP blowing agent consumption by sector (2013-2020)

	non-A5	***A5***
PU Appliance	41.34%	41.34%
PU Boardstock	2.48%	0.00%
PU Panel	44.68%	78.60%
PU Spray	99.63%	100.00%
PU In-situ/Block	36.08%	99.64%
XPS Board	81.84%	99.98%
Phenolic	15.98%	32.51%
Total	***35.61%***	***48.37%***

Polyurethane – appliance

Polyurethane foam is now the insulation of choice for over 95% of the global market. There is increasing interest in the use of vacuum panels in some quarters, but the market penetration is expected to be limited to highly energy-sensitive areas of a cabinet, since cost remains an issue.

Table 8-17 indicates that just over 40% of global consumption of blowing agent in the period from 2013 to 2020 will be based on high-GWP materials. This is primarily driven by consumption in North America, where the use of HFC-245fa remains substantial. However, as shown in Figure 8-2 below, if low-GWP alternatives could be adopted immediately in non-Article 5 Parties, the climate impact would be reduced by approximately 175,000 $ktCO_2$-eq. in the period to 2020. In practice, the likely substitutes in North America will be unsaturated HFCs (HFOs), or blends containing them, so commercial availability will be a factor.

It is likely that transitions, if they occur, will not commence before late 2014 or early 2015, meaning that cumulative avoided consumption in the period to 2020 will do well to exceed 100,000 $ktCO_2$-eq. Similarly, the amount of avoided consumption of high GWP blowing agents in the period will be of the order of 100,000 tonnes based on these forecasts.

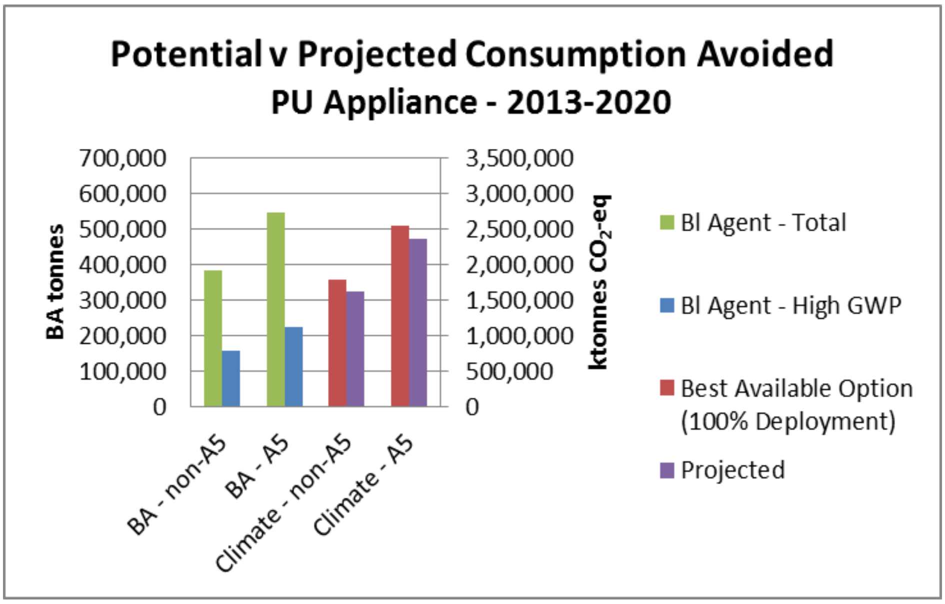


Figure 8-2: Projected PU appliance consumption (2013-2020) and climate avoidance

In Article 5 Parties, the primary transition being faced is from HCFC-141b with just over 200,000 tonnes of consumption expected through to 2020 in a business-as-usual scenario. An assessment of the current HPMPs shows that the primary substitute will be hydrocarbon, with additional proportions of methyl formate and HFC-245fa being adopted for smaller enterprises, where the economies of scale do not support the hydrocarbon investment.

Since HCFC-141b is prioritised under most HPMPs on the 'worst-first' basis, the majority of HCFC-141b phase-out is expected to be completed by 2015, delivering a climate saving of around 150,000 ktCO$_2$-eq. against a maximum potential of ~190,000 ktCO$_2$-eq.

Polyurethane – boardstock

In practice, there is very little to consider in the polyurethane boardstock sector, as is indicated in Table 3-17 by the very low proportions of high GWP blowing agent in use across the sector in both non-Article 5 and Article 5 regions. The bulk of blowing agent across the industry is hydrocarbon-based and although there may be some interest in experimenting with unsaturated HFCs (HFOs) in order to improve thermal performance still further, this is likely to be countered by the impact that the price of the blowing agents might have in this cost-sensitive market.

This may open the way for experimentation with blends and, indeed, this is already happening to an extent in Europe, where efforts are being made to gain standards approvals. The impact of the introduction of HFOs on overall direct climate impact is likely to be very small, as both hydrocarbons and HFOs have similarly low GWPs. The lack of impact is illustrated well in Figure 8-3 where the projected avoided climate impact is virtually equivalent to the 'best available option'.

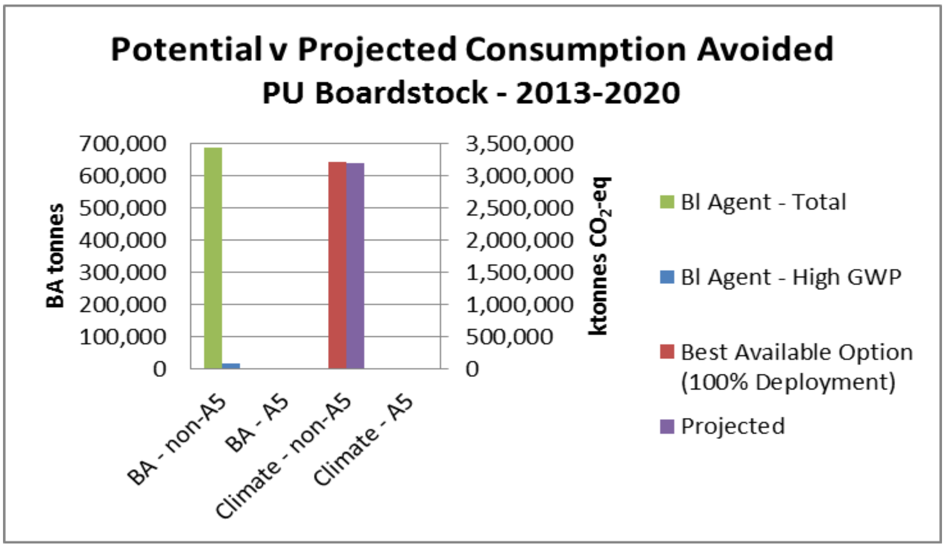


Figure 8-3: Projected PU boardstock consumption (2013-2020) and climate avoidance

Polyurethane – panel

Even in non-Article 5 Parties, the proportion of high-GWP blowing agents amounts to nearly 45%, as shown in Figure 8-17. There is the potential for future avoidance of up to 170 million tonnes CO$_2$-eq in the period to 2020 if appropriate low GWP solutions can be introduced. The barriers to this have already been covered in Section 5.4.3. It would not be reasonable to expect more than 50% of the cumulative consumption between now and 2020 to be realistically avoidable and this will be reliant on the technical and economic viability of emerging blowing agents.

For Article 5 Parties, the on-going impact of the discontinuous panel sector, and its limited choice of options, is also evident from Figure 8-4. The indication is that HCFC phase-out will not be complete in the panel sector before 2020 with some HPMPs deferring transitions until the path forward is clearer. It seems likely that future growth in panels for buildings in the larger economies will be served by new investment and the transplant of hydrocarbon technologies from non-Article 5 Parties. This will serve to 'dilute' the overall impact of the panel sector, particularly if the improved energy savings are factored in.

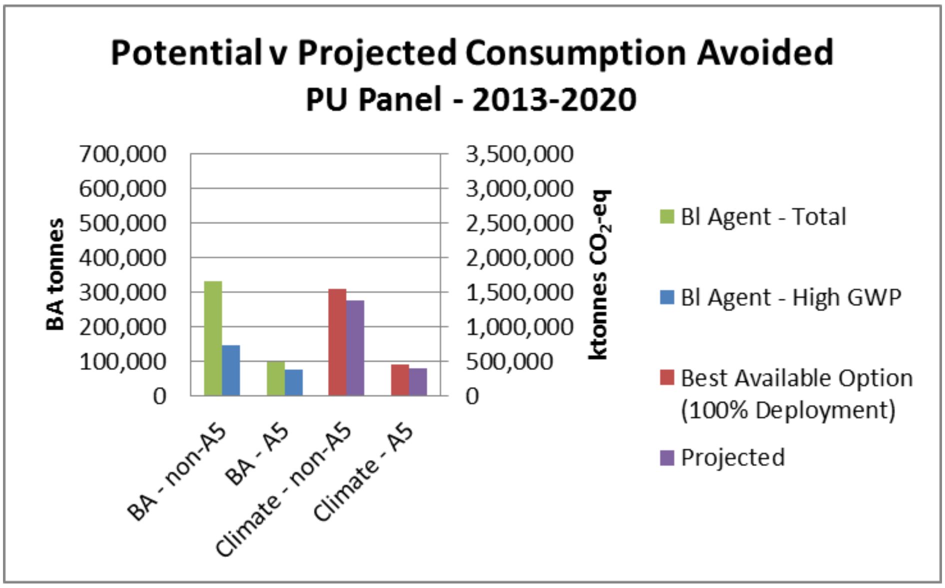


Figure 8-4: Projected PU panel consumption (2013-2020) and climate avoidance

Polyurethane – Spray

Alongside extruded polystyrene (XPS), this remains one of the most challenging sectors in which to achieve phase-out of high-GWP blowing agents. Although the overall consumption of the sector is likely to be less than 200,000 tonnes globally between now and 2020, over 99% of this is likely to be high in high GWP blowing agents unless emerging blowing agents, such as HFOs, can be brought into good effect. However, even if this can be achieved, the decentralised nature of the industry is likely to mean that no more than 25% of the cumulative high-GWP consumption (~50,000 tonnes) will be avoided.

In non-Article 5 Parties, the main targets for substitution will be saturated HFCs such as HFC-245fa and HFC-365mfc. By contrast, the Article 5 target for substitution is primarily HCFC-141b. It should be noted that the phase-out of HCFCs is still some way off since projections out to 2020 continue to indicate the fact that the complete avoidance of ODS consumption is unlikely to be achieved in the first round of HPMPs.

In summary, the 50,000 tonnes of high-GWP blowing agents that might be avoided in the period to 2020 would be expected to offer an avoided climate impact of 35,000-40.000 $ktCO_2$-eq.

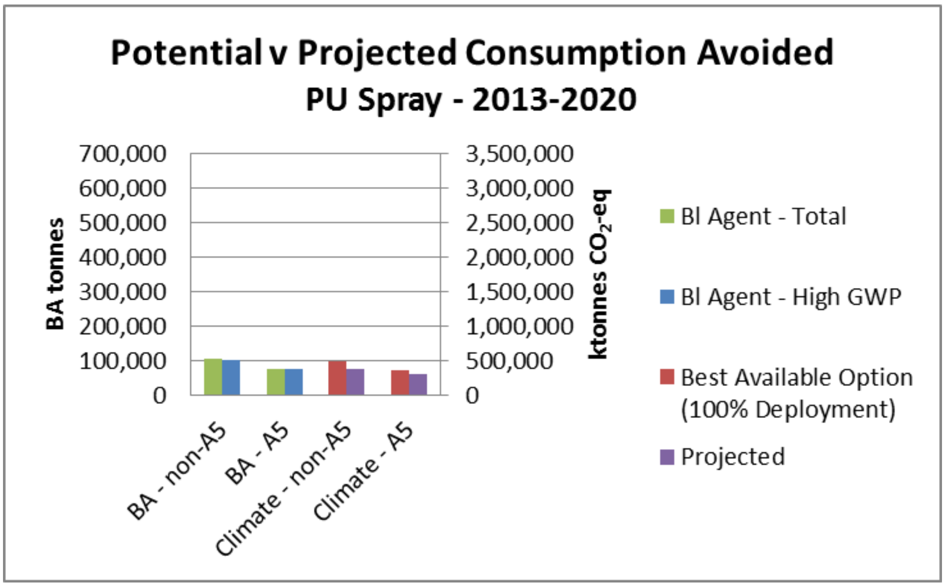


Figure 8-5: Projected PU spray consumption (2013-2020) and climate avoidance

Polyurethane – in-situ/block

It is estimated that a further 25 million tonnes CO_2-eq of climate impact could be avoided by prompt action to introduce low GWP options in this sector. However, Table 8-17 reveals that the bulk of high-GWP blowing agent usage is in Article 5 Parties and much of this is in small decentralised applications such as the production of thermoware. Reviewing the HPMPs for this sector shows that the 'umbrella project' concept is likely to be adopted in a number of HCFC Phase-out Management Plans (HPMPs) over the next 5-10 years. An additional 50 million tonnes CO_2-eq will remain unaddressed in the period to 2020 without such further action. The extent to which transitions will be achieved remains to be seen, but a conservative estimate would suggest that 25% of the cumulative consumption of high-GWP blowing agents could be avoided.

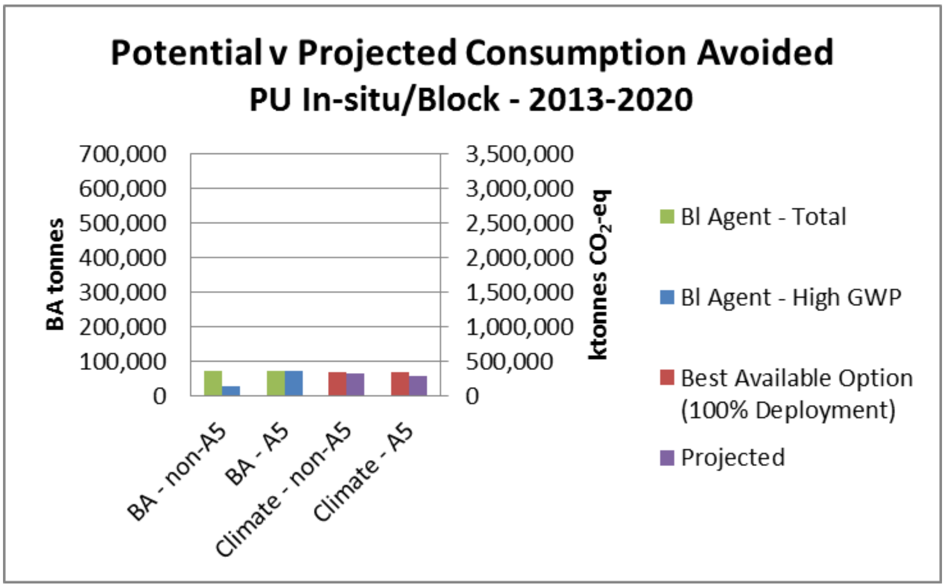


Figure 8-6: Projected PU In-situ/block consumption (2013-2020) and climate avoidance

For non-Article 5, just over 25 million tonnes CO_2-eq is at stake in the period to 2020, but this is typically in applications currently reliant on saturated HFCs. The ability to make transitions in this sector is likely to depend on the technical and economic viability of emerging blowing agents such as HFOs and methyl formate, as well as the market and regulatory drivers stimulating the transition. Again, a 25% penetration, based on cumulative consumption might be expected in the period to 2020 for this sector.

Polyurethane – integral Skin

For reasons explained in Chapter 3, there is no quantitative data currently available for the integral skin sector. In non-Article 5 countries the only remaining high GWP blowing agents are likely to be saturated HFCs, although their use is very limited and likely to be phased-out entirely before 2020.

For Article 5 countries, the main high-GWP blowing agents receiving attention are HCFCs – either HCFC-141b or HCFC-22. A review of current HPMPs reveals that methyl formate will be a significant substitute in this application, particularly in Latin America where experience and technical support networks are more established.

XPS board

The XPS industry is currently being challenged in a number of areas simultaneously. The most significant is the increasing pressure on the use of hexa-bromo-cyclo-dodecane (HBCD) as a flame retardant. This, in turn, makes a transition to more flammable blowing agents difficult to contemplate and the industry is unlikely to make any significant further moves in non-Article 5 Parties until the impact of these product changes is fully assessed. Nevertheless, there are some regulatory regimes which are seeking to target a further transition from saturated HFCs in non-Article 5 countries, although these are unlikely to set significant sunset dates before 2020. Therefore, the Task Force believes it unlikely that more than 10% of cumulative consumption of high GWP blowing agent will be avoided in the period to 2020.

The challenge now facing the industry in Article 5 countries is which of the technology options being practiced in non-Article 5 Parties should be followed. The use of saturated HFC blends represents the least-cost investment away from HCFCs from an investment perspective, but the adoption of Japanese hydrocarbon technologies offers the best option from a climate and operating cost perspective. However, they do raise important issues in terms of product flammability.

The opportunity going forward offers the prospect of climate impact avoidance in non-Article 5 Parties in the order of nearly 900 million tonnes of CO_2-eq. in the period to 2020, although achieving this will depend on the availability of meaningful alternatives in due time.

Conservatively, it is not expected that more than 25% of cumulative consumption will be avoidable by 2020.

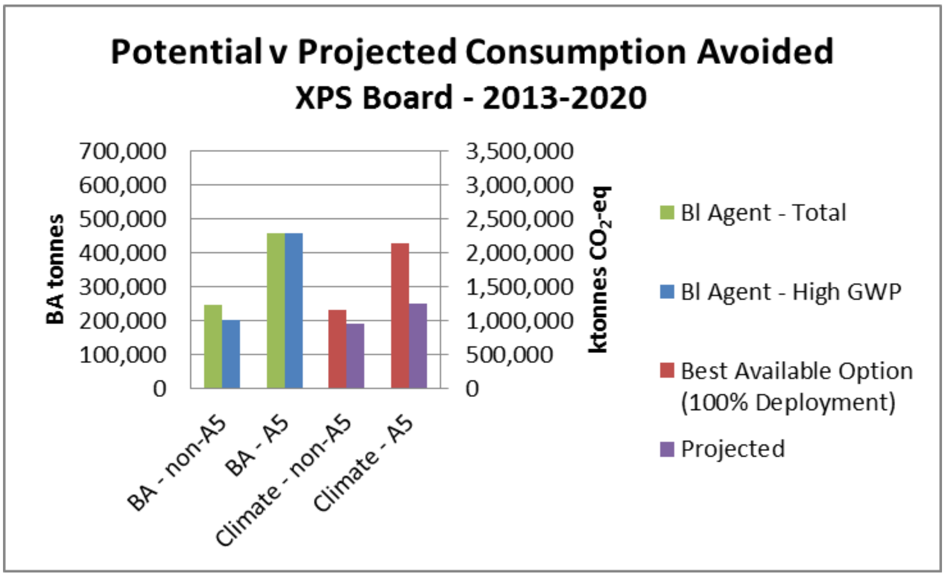


Figure 8-7: Projected XPS board consumption (2013-2020) and climate avoidance

Phenolic foam

The phenolic foam sector has very little impact on the overall assessment of avoidable high-GWP consumption in the period to 2020, since, as a proportion of global foam manufacture it represents only a small percentage, and most of its transitions have already been made to low-GWP options such as hydrocarbons. For the phenolic foam boardstock sector, there are a number of parallels with the PU boardstock situation. Moving forward the maximum additional saving achievable in the period through to 2020 is likely to be no more than 5 million tonnes CO_2-eq. in non-Article 5 Parties based on avoidance of consumption of little over 5,000 tonnes.

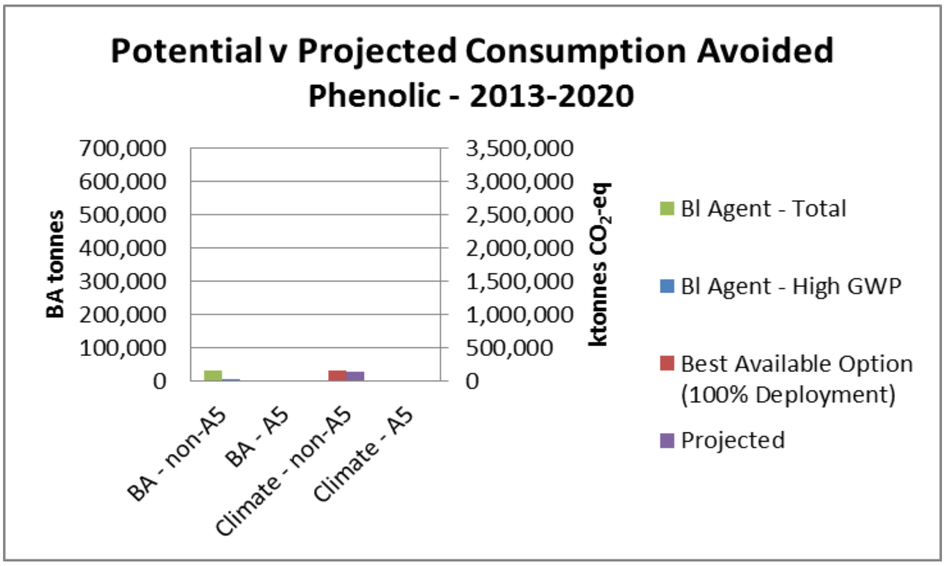


Figure 8-8 Projected phenolic foam consumption (2013-2020) and climate avoidance

Summary of likely avoidable consumption in the period to 2020

Table 8-18 below summarises the likely avoided consumption of high-GWP blowing agents identified in the previous paragraphs.

Table 8-18: Likely avoided consumption of high GWP blowing agents in non-Article 5 and Article 5 countries

	Cumulative High-GWP Consumption to 2020				***Est. % Avoidance***		***Estimated Avoided Consumption to 2020***			
	Non-Article 5		Article 5		Non-A5	A5	Non-Article 5		Article 5	
	tonnes	*ktCO2-eq*	*tonnes*	*ktCO2-eq*			*tonnes*	*ktCO2-eq*	*tonnes*	*ktCO2-eq*
PU Appliance	159,132	176,652	225,420	189,564	55%	75%	87,523	97,158	169,065	142,173
PU Boardstock	17,054	19,747	-	8	50%	50%	8,527	9,874	-	4
PU Panel	148,542	172,550	77,374	54,710	50%	40%	74,271	86,275	30,950	21,884
PU Spray	103,966	105,824	75,895	53,582	25%	25%	25,992	26,456	18,974	13,395
PU In-situ/Block	26,881	25,910	71,839	50,711	25%	25%	6,720	6,478	17,960	12,678
XPS Board	202,705	192,878	457,667	891,499	10%	25%	20,271	19,288	114,417	222,875
Phenolic	5,196	4,978	408	282	50%	50%	2,598	2,489	204	141
Total	***663,476***	***698,539***	***908,603***	***1,240,356***			***225,901***	***248,017***	***351,569***	***413,150***
							34.05%	*35.51%*	*38.69%*	*33.31%*

9 Conclusions

Refrigeration and air conditioning

- The refrigeration and air conditioning sector has made substantial progress in reducing its negative environmental impact between 1990 and 2012. This holds in particular for sectors that have completely converted from CFC-12 to non-ozone depleting substances, such as domestic refrigeration and mobile air conditioning, however, to a lesser degree for other subsectors that have always been using HCFCs.

- The development and deployment of alternatives to HCFCs in particular, has cost and is costing a substantial amount of time globally. Whereas the use of HCFCs has been virtually phased out in new manufacture in non-Article 5 countries, there remains a period that amounts will be needed for servicing. The way HCFC servicing has been addressed in different regions varies significantly.

- In Article 5 countries the HCFC phase-down has just started, and it will take several more years before HCFCs have been phased out, both in new manufacture and in servicing.

- The main HCFC and HFC consuming sub sectors in refrigeration and air conditioning are commercial refrigeration and stationary air conditioning. It seems likely that the refrigerant R-404A with a very high GWP will not be applied much longer in commercial refrigeration. The development is not clear where it concerns all possible other refrigerants with high GWPs.

- Commercial refrigeration includes many subsectors, and at this stage, the high GWP HFCs are still seen as the short-term option for HCFCs. Alternatively possible refrigerants are constituted by low GWP pure fluids and lower GWP blends. Carbon dioxide is a refrigerant that can be applied in many supermarkets, in particular in the low temperature stage and in moderate ambient temperatures, although developments are ongoing to expand the application area.

- A number of alternatives are being considered for stationary air conditioning including carbon dioxide and hydrocarbons for certain uses. A refrigerant with a dominant penetration rate is difficult to identify at this moment; HFC-32 has started to play a role as the lower GWP alternative for R-410A in many types of AC equipment. Similar as for mobile air conditioning, the use of one (global) refrigerant leads to an economy of scale for manufacturers and good standardisation of components.

- In the range of low GWP (halocarbon) refrigerants, three unsaturated HFCs and two blends (mixtures of unsaturated and saturated HFCs) are considered as replacements, and in the range of low to medium GWP there are four (HFC based) blends proposed. The number of announced refrigerant blends infers the considerable research and development activities underway. The majority of these blends comprise primarily various unsaturated fluorocarbons such as HFC-1234yf and HFC-1234ze and HFC-152a and particularly HFC-32 in order to achieve higher vapour pressures. Many proposed blends also include R-744, HFC-161 and hydrocarbons in small proportions. The selection of the composition is typically a compromise between GWP, flammability and cycle performance measures.

- Overarching issues are important, including the ones related to servicing and end-of-life treatment. For issues that affect the safety, more intensive training will be needed. This could be double the amount in case of flammable substances compared to the conventional HFCs, but would still be less than 1% of the product cost.

- Different national, regional and international standards related to the safe application of refrigerants have been developed providing information on the safety classification of refrigerants and also measures that can be applied in order to minimise the risks related to higher toxicity, flammable and/or high pressure substances, irrespective of their end use.

- In order to better evaluate impacts, it is important to define a penetration rate potential for alternatives in the (near) future. Constraints would be due to safety, efficiency, cost, material availability etc. This report proposes to separate between three categories: a potentially dominant (>50%), a potentially competitive (10-50%) and a low potential for penetration (<10%).

- In the period 1990-2012, a maximum of 3.4 Gt CO_2-eq. could theoretically have been avoided globally by the application of low GWP refrigerants in domestic refrigeration from the outset. This is made up from 2.94 Gt CO_2-eq., which could have been avoided by the application of HFC-134a, the remainder by low GWP refrigerants (e.g. hydrocarbons). In practice, more than 3 Gt CO_2-eq. has been avoided by the application of HFC-134a and HC-600a in that period.

- In the period 1990-2012, 31.1 Gt CO_2-eq. would have been the potential CFC-12 emissions from mobile air conditioning. 27 Gt CO_2-eq. of this total could have been avoided by converting all operations to HFC-134a (this has been accomplished to a large degree in practice). The remainder could have been avoided by the application of a low GWP alternative.

- A BAU case has to be established to determine amounts that can be avoided in the period 2013-2020. This BAU case involves parameters on leakage (serving amounts and end of life treatment), likely penetration of lower GWP alternatives by 2020 for certain alternatives in subsectors and subsectors, assumption about economic growth during 2013-2020 etc. The BAU case can be applied to all subsectors of refrigeration and air conditioning; however, the main conclusions can be drawn from applying it to the large consuming sectors commercial refrigeration and stationary air conditioning. It is important to realise that the assumptions made for the BAU case still lead to considerable uncertainties in the conclusion.

- During the period 2013-2020, the application of certain amounts of lower GWP alternatives in these two subsectors would lead to an (aggregated) amount of 794 ktonnes of refrigerant that can be avoided (out of the total of 7356 ktonnes), being 11% of the total. This would be equal to 2.38 Gt CO_2-eq. (2.38 billion t CO_2-eq.), or 15% of the total expressed in t CO_2-eq.

- Assuming an 80% penetration of low GWP in MACs in non-Article 5 countries by 2020, as well as a 20% penetration in Article 5 countries, this would result in an amount of 184 ktonnes of (HFC-134a) refrigerant that can be avoided (aggregated during 2013-2020), or 247 Mt CO_2-eq. expressed in climate impact terms (this should be added to the amount mentioned in the bullet above).

- With the first low GWP penetration rates set in this report for the year 2020, while taking a conservative estimate for the global servicing percentage, it may well imply that even higher amounts can be avoided during the period 2020-2030.

Foams

- The foam sector has made substantial strides in minimising its environmental impact between 1990 and 2012, with over 80% of ozone depletion potential and 66% of climate impact being avoided, even when most conservatively assessed.

- Although, in hindsight, some sectors may have been able to be more aggressive in their technology choices, delays in transition while these technologies were proven could have been more damaging to the environment than the course actually chosen. In many cases, "the best could have been the enemy of the good"

- The current status of blowing agent consumption indicates that 35.6% of non-Article 5 consumption is high-GWP, while the figure for Article 5 countries is 48.4%, reflecting the fact that HCFC phase-out is still to be completed in most Article 5 regions.

- There are several foam sectors that pose particular challenges for rapid high-GWP blowing agent phase-out. These include PU Spray Foam and XPS Board, where process and product safety remain pressing issues with the currently available alternatives.

- Emerging blowing agent solutions, most notably unsaturated HFCs and HCFCs (collectively HFOs), are likely to provide workable solutions, either on their own or in blends, for a number of these challenging applications.

- The transition away from high-GWP blowing agents will depend primarily on technical, market and regulatory pressures in non-Article 5 Parties, while in Article 5 countries, the prime driver will be the implementation of HPMPs.

- A particular barrier remains the ability of small and micro-enterprises to invest in flammable low-GWP blowing agents (e.g. hydrocarbons) because of the capital costs involved and lack of economies of scale. Nevertheless, investment can be critical for enterprises to have competitive operating costs.

- Although potential savings in the period from 2013 to 2020 could be as high as 1.56 million tonnes of high-GWP blowing agent (1.94 billion t CO_2-eq.), the more likely practical achievement, based on the commercialisation strategies of emerging alternatives and the implementation schedule for HPMPs will be closer to 575,000 tonnes of high-GWP blowing agent (0.66 billion tCO_2-eq.).

Fire Protection

- The fire protection sector made substantial progress in reducing the use of ODS between 1990 and 2012. With very few exceptions, there are alternatives commercially available for all previous uses of ODSs.
- Today the user is faced with a wide range of potential fire protection options for fixed flooding applications, as well as for local application and portable applications.
- While most new applications can be satisfied using environmentally sound alternatives, the need for chemical agents remains as inert gases, water, dry powders and other alternatives are not suitable for many special hazard fire protection applications.
- In the fixed flooding market, HFCs have predominately filled the chemical agent role but, since about 2005, a fluoroketone (FK) has increasingly become more accepted.
- In the smaller local application and portable extinguisher market, a special blend of HCFC-123 predominates with substantial lesser amounts of HFCs as the chemical agents of choice.
- The aviation sector and certain military and cold climate applications remain a challenge in the move away from ODS based extinguishing agents. Nevertheless, the fire protection industry is still evaluating alternatives that have low environmental impacts, and the Halons Technical Options Committee is assessing regional biases in fire protection agent, systems and costs across the spectrum of available choices, which may provide additional clarity on market penetration options for low environmental impact agents in the future.

10 Material submitted by Parties

10.1 Submissions received before May 2013

The U.S. government submitted the following list with reference material (4 February 2013):

SUMMARY of SUBMISSION

1. **Recent (2011-2012) Relevant U.S. EPA Final SNAP Regulations and Listings**
   - 1.1. U.S. EPA, Significant New Alternatives Policy, 2011 Ruling on Hydrocarbon Refrigerants
   - 1.2. U.S. EPA, Significant New Alternatives Policy, 2011 Ruling on HFO-1234yf in Motor Vehicle AC
   - 1.3. U.S. EPA, Significant New Alternatives Policy, 2012 Ruling on CO_2 in Motor Vehicle AC
   - 1.4. U.S. EPA, Significant New Alternatives Policy, 2012 Acceptability Determination 27

2. **Fact Sheets on Alternatives**
   - 2.1. Commercial Refrigeration HFC Fact Sheet
   - 2.2. Domestic Refrigeration HFC Fact Sheet
   - 2.3. Transport Refrigeration HFC Fact Sheet
   - 2.4. MVAC HFC Fact Sheet
   - 2.5. Unitary AC HFC Fact Sheet
   - 2.6. Construction Foams HFC Fact Sheet
   - 2.7. Alternatives to HFCs Fact Sheet

3. **HFCs Under the Montreal Protocol**
   - 3.1. Benefits of Addressing HFCs under the Montreal Protocol
   - 3.2. Frequently Asked Questions on the North American Amendment Proposal to Phase Down HFCs under the Montreal Protocol

4. **Available and Emerging Alternative Technologies**
   - 4.1. Advancing Ozone and Climate Protection Technologies: Next Steps
   - 4.2. Montreal Technology Forum on Climate-friendly Alternatives in Commercial Refrigeration
   - 4.3. GreenChill Webinar Series on Alternative Technologies in the Commercial Refrigeration Sector HFC-Free Technologies Are Available in the Supermarket Retail Refrigeration Sector
   - 4.4. HFC-Free Technologies Are Available in the Supermarket Retail Refrigeration Sector
   - 4.5. Greenpeace - Cool Technologies: Working without HFCs Report
   - 4.6. Purdue University 2012 Conference Presentations
   - 4.7. AHRI Low-GWP Alternative Refrigerants Evaluation Program Reports
   - 4.8. ASHRAE/NIST Refrigerants Conference 2012 Presentations and Conference Papers

1. Recent (2011-2012) Relevant U.S. EPA Final Regulations and Listings

1.1. U.S. EPA, Significant New Alternatives Policy, 2011 Ruling on Hydrocarbon Refrigerants

Title: *Protection of Stratospheric Ozone: Listing of Substitutes for Ozone Depleting Substances - Hydrocarbon Refrigerants*

Description: Adds isobutane (R–600a) and R–441A to the SNAP list of acceptable refrigerants, subject to use conditions, in household refrigerators, freezers, and combination refrigerators and freezers. Additionally adds propane (R –290), subject to use conditions, in retail food refrigerators and freezers (standalone units only).

Available at: http://www.gpo.gov/fdsys/pkg/FR-2011-12-20/pdf/2011-32175.pdf

Filename: SNAP Rule on Hydrocarbon Refrigerants for Household and Stand-alone Commercial Refrigerators and Freezers.pdf

1.2. U.S. EPA, Significant New Alternatives Policy, 2011 Ruling on HFO-1234yf in Motor Vehicle AC

Title: *Protection of Stratospheric Ozone: New Substitute in the Motor Vehicle Air Conditioning Sector Under the Significant New Alternatives Policy (SNAP) Program*

Description: Finds hydrofluoroolefin (HFO)–1234yf as acceptable, subject to use conditions, as a substitute in motor vehicle air conditioning for new passenger cars and light-duty trucks.

Available at: http://www.gpo.gov/fdsys/pkg/FR-2011-03-29/pdf/2011-6268.pdf

Filename: SNAP Rule on HFO-1234yf in MVAC.pdf

1.3. U.S. EPA, Significant New Alternatives Policy, 2012 Ruling on CO_2 in Motor Vehicle AC

Title: *Protection of Stratospheric Ozone: New Substitute in the Motor Vehicle Air Conditioning Sector Under the Significant New Alternatives Policy (SNAP) Program*

Description: Adds carbon dioxide (CO_2) or R–744 to the SNAP list of acceptable refrigerants, subject to use conditions, in the motor vehicle air conditioning systems designed specifically for the use of CO_2 refrigerant in passenger cars, light-duty and heavy-duty vehicles.

Available at: http://www.gpo.gov/fdsys/pkg/FR-2012-06-06/pdf/2012-13189.pdf

Filename: SNAP Rule on CO2 in MVAC.pdf

1.4. U.S. EPA, Significant New Alternatives Policy, 2012 Acceptability Determination 27

Title: *Protection of Stratospheric Ozone: Determination 27 for Significant New Alternatives Policy Program*

Description: Adds low-GWP alternatives to the SNAP list of acceptable refrigerants, for commercial comfort air conditioning, heat transfer, vending machines, foam blowing, aerosols, and fire suppression.

Available at: http://www.gpo.gov/fdsys/pkg/FR-2012-08-10/pdf/2012-19688.pdf

Filename: HFC-Free Technologies Are Available in the Supermarket Retail Refrigeration Sector.pdf

2. Fact Sheets on Alternatives

2.1. Commercial Refrigeration HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in Commercial Refrigeration*
Description: This fact sheet provides information on low-GWP alternatives in newly manufactured commercial refrigeration equipment.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_ComRef.pdf
Filename: Commercial Refrigeration HFC Fact Sheet.pdf

2.2. Domestic Refrigeration HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in Domestic Refrigeration*
Description: This fact sheet provides information on low-GWP alternatives in newly manufactured domestic refrigeration equipment.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_DomRef.pdf
Filename: Domestic Refrigeration HFC Fact Sheet.pdf

2.3. Transport Refrigeration HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in Transport Refrigeration*
Description: This fact sheet provides information on low-GWP refrigerant and foam blowing agent alternatives used in transport refrigeration equipment.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_Transport.pdf
Filename: Transport Refrigeration HFC Fact Sheet.pdf

2.4. MVAC HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in MVACs*
Description: This fact sheet provides information on low-GWP alternatives in newly manufactured MVACs.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_MVAC.pdf
Filename: MVAC HFC Fact Sheet.pdf

2.5. Unitary AC HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in Unitary Air Conditioning*
Description: This fact sheet provides information on low-GWP alternatives in new equipment in unitary air conditioning.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_UAC.pdf
Filename: Unitary AC HFC Fact Sheet.pdf

2.6. Construction Foams HFC Fact Sheet

Title: *Transitioning to Low-GWP Alternatives in Building/Construction Foams*
Description: This fact sheet provides information on low-GWP foam blowing agent alternatives used in building and construction applications.
Available at: http://www.epa.gov/ozone/downloads/EPA_HFC_ConstFoam.pdf
Filename: Construction Foams HFC Fact Sheet.pdf

2.7. Alternatives to HFCs Fact Sheet

Title: *CCAC Climate and Clean Air Coalition to Reduce Short-Lived Climate Pollutants: Fact Sheet - Alternatives to HFCs*

Description: This fact sheet provides information on HFCs and the advancement of HFC reduction efforts; including projects to promote the international exchange of information on HFC use, emissions reductions strategies, alternative technologies, and standards.

Available at: http://www.unep.org/ccac/Portals/24183/PartnersArea/pdf/CCAC FACT SHEET-HFCs-EN-LR.pdf

Filename: CCAC Alternatives to HFCs Fact Sheet.pdf

3. HFCs Under the Montreal Protocol

3.1. Benefits of Addressing HFCs under the Montreal Protocol

Title: *Benefits of Addressing HFCs under the Montreal Protocol, June 2012*

Description: This paper presents an analysis of the potential benefits from globally reducing consumption of HFCs and reducing byproduct emissions of HFC-23 under the Montreal Protocol. This paper discusses the environmental downsides of continued HFC consumption and emissions; the proposal from Canada, Mexico and the United States to amend the Montreal Protocol to address HFCs, the availability of alternatives for meeting the reduction schedule; transitioning to low-GWP alternatives; case studies in the transition to low-GWP alternatives; and byproduct emissions of HFC-23. This paper was also presented at the ASHRAE/NIST conference in *October, 2012, at the National Institute of Standards & Technology.*

Available at: http://www.epa.gov/ozone/downloads/Benefits of Addressing HFCs Under the Montreal Protocol, June 2012.pdf

Filename: Benefits of Addressing HFCs under the Montreal Protocol.pdf

3.2. Frequently Asked Questions on the North American Amendment Proposal to Phase Down HFCs under the Montreal Protocol

Title: *Frequently Asked Questions on the North American Amendment Proposal to Phase Down the Use of Hydrofluorocarbons under the Montreal Protocol On Substances That Deplete The Ozone Layer*

Description: Frequently asked questions and responses relating to the North American amendment proposal to phase down the use of hydrofluorocarbons under the Montreal Protocol on Substances that Deplete the Ozone Layer (Submitted by Canada, Mexico and the United States of America in November 2012)

Available at: http://conf.montreal-protocol.org/meeting/mop/mop-24/presession/Information Documents/MOP-24-INF-7.pdf

Filename: Frequently Asked Questions on the North American Amendment Proposal.pdf

4. Available and Emerging Alternative Technologies

4.1. Advancing Ozone and Climate Protection Technologies: Next Steps

Title: *Advancing Ozone & Climate Protection Technologies: Next Steps – Meeting Summary*

Description: This report summarizes the outcomes of the Bangkok Technology Conference and technology exhibition; including discussion of various alternatives and approaches to ensure that the phase out of CFCs and HCFCs is done in such as way as to limit the climate contribution of high-GWP HFCs. Forum discussion included both policy and technical aspects of this transition in the refrigeration, air conditioning and foams sectors.

Available at: http://www.unep.org/ccac/Portals/24183/docs/Bangkok%20Technology%20Conference%20-%20Report%20and%20Cover%20-%20FINAL.pdf

Filename: Bangkok Technology Conference - Report and Cover - FINAL.pdf

Title: *Hydrocarbons in Air-conditioners – The Godrej Experience*

Description: This presentation from the Advancing Ozone & Climate Protection Technologies: Next Steps technology conference shares one company's experience with hydrocarbon refrigerants in air conditioning systems.

File Name: Session-V Air Conditioning (Dilip Rajadhyaksha - Godrej).pdf

4.2. Montreal Technology Forum on Climate-friendly Alternatives in Commercial Refrigeration

Title: *Montreal Technology Forum on Climate-friendly Alternatives in Commercial Refrigeration – Meeting Summary*

Description: This summary report from the Montreal Commercial Refrigeration Technology Forum held in December, 2012, provides information on various topics discussed during the conference, including; the technical, financial and environmental aspects of some of the key low-GWP, energy-efficient alternative technologies that are available or emerging in the commercial refrigeration sector; potential applicability of these technologies in developing countries; and dialogue among government representatives, international organizations, industry, technology users and technology providers, on the opportunities and challenges involved in successfully adopting such technologies in developing countries.

Available at: http://www.unep.org/ccac/Techforum/tabid/105036/Default.aspx

Filename: The document is in the process of being finalized in early February. We will transmit the document when it becomes available.

4.3. GreenChill Webinar Series on Alternative Technologies in the Commercial Refrigeration Sector

Description: Information regarding new technologies being deployed in the commercial refrigeration sector can be accessed through archived webinars, presentations, and additional items; including the following webinars:

- Transcritical CO_2 Refrigeration Systems
- Cascade CO_2 Refrigeration Systems
- Ammonia Cascade Systems

Available at: http://www.epa.gov/greenchill/events.html

HFC-Free Technologies Are Available in the Supermarket Retail Refrigeration Sector

Title: *HFC-Free Technologies Are Available in the US* Market for the Supermarket - Retail Refrigeration Sector

Description: This report discusses the availability of climate-friendly technologies for the refrigeration sector in U.S. supermarkets that will allow for the rapid phase-out of HFCs.
Available at: http://eia-global.org/PDF/USSUPERMARKETREPORT.pdf
Filename: HFC-Free Technologies Are Available in the Supermarket Retail Refrigeration Sector.pdf

4.4. Greenpeace - Cool Technologies: Working without HFCs Report

Title: *Greenpeace – Cool Technologies: Working without HFCs, Examples of HFC-Free Cooling Technologies in Various Industrial Sectors, 2012 Edition*
Description: This report documents the current availability of HFC-free cooling technologies in most sectors and more are rapidly coming on line. The report surveys an extensive list of companies and enterprises using HFC-free technologies, documenting the already wide array of safe and commercially proven HFC-free technologies for meeting nearly all needs formerly met by fluorocarbons.
Available at: http://www.greenpeace.org/international/Global/international/publications/climate/2012/Fgases/Cool-Technologies-2012.pdf
Filename: Cool-Technologies-2012.pdf

4.5. Purdue University 2012 Conferences Presentations

Title: *21st International Compressor Engineering Conference at Purdue, 14th International Refrigeration and Air Conditioning Conference at Purdue, 2nd International High Performance Buildings Conference at Purdue – July 16-19, 2012 at Purdue University*
Description: Links to various sessions with presentations on alternative technologies including:

Session: **Low GWP Refrigerants I**
Title: *Low Global Warming Potential (GWP) Alternative Refrigerants Evaluation Program (Low-GWP AREP)*
Title: *R32 And HFOs As Low-GWP Refrigerants For Air Conditioning*
Title: *Performance and Capacity Comparison of Two New LGWP Refrigerants Alternative to R410A in Residential Air Conditioning Applications*
Title: *Drop-in Performance of Low GWP Refrigerants in a Heat Pump System for Residential Applications*
Title: *Study of R161 Refrigerant for Residential Air-conditioning Applications*
Available at: http://www.conftool.com/2012Purdue/index.php?page=browseSessions &form_session=3

Session: **R-31: Low GWP Refrigerants II**
Title: *A Reduced GWP Replacement for HFC-134a in Centrifugal Chillers: XP10 Measured Performance and Projected Climate Impact*
Title: *Latest Developments of Low Global Warming Refrigerants for Chillers*

Title: *Low Global Warming Refrigerants For Commercial Refrigeration Systems*
Title: *The Circulation Composition Characteristic of the Zeotropic Mixture R1234ze(E)/R32 in a Heat Pump Cycle*
Title: *Development of Refrigeration Oil for Use With R32*
Title: *Investigation Of Low GWP Refrigerant Interaction With Various Lubricant Candidates*

Available at*:* http://www.conftool.com/2012Purdue/index.php?page=browseSessions&form_session=31

Session: **Industrial/Commercial Refrigeration**

Title: *Drop-in Testing of Next-Generation R134a Alternates in a Commercial Bottle Cooler/Freezer*

Title: *Development of Low Global Warming Potential Refrigerant Solutions for Commercial Refrigeration*

Title: *Modeling and Simulation of a Desiccant Assisted Brayton Refrigeration Cycle*

Title: *Taking a Sensible Choice of Sustainable Super Market Refrigeration Equipment*

Title: *Evaluation Of Defrost Options For Secondary Coolants In Multi-temperature Indirect Transport Refrigeration: Mathematical Modeling & Sensitivity Analysis*

Available at: http://www.conftool.com/2012Purdue/index.php?page=browseSessions&form_session=14

4.6. AHRI Low-GWP Alternative Refrigerants Evaluation Program Reports

Title: *Air-Conditioning, Heating, and Refrigeration Institute Low-GWP Alternative Refrigerants Evaluation Program final test reports.*

Description: Final test reports evaluating low-GWP alternative refrigerants, including:

Title: *System Drop-in Test of R-410A Alternative Fluids (ARM-32a, ARM-70a, DR-5, HPR1D, L-41a, L-41b, and R-32) in a 5-RT Air-Cooled Water Chiller (Cooling Mode)*

File Name: AHRI Low-GWP AREP-Rpt-001.pdf

Title: *System Drop-In Test of L-40, L-41a and N-40b in Ice Machines*

File Name: AHRI Low-GWP AREP-Rpt-002.pdf

Title: *System Drop-In Test of R-32/R-152a (95/5) in 5-ton Air Source Heat Pump*

File Name: AHRI Low-GWP AREP-Rpt-003.pdf

Available at: http://www.ahrinet.org/ahri+low_gwp+alternative+refrigerants+evaluation+program.aspx

4.7. ASHRAE/NIST Refrigerants Conference 2012 Presentations and Conference Papers

Title: 2012 ASHRAE/NIST Refrigerants Conference: Moving Towards Sustainability, October 29-30, 2012, Gaithersburg, Maryland

Description: Link to various presentations on alternative technologies

Available at: https://www.ashrae.org/membership--conferences/conferences/ashrae-conferences/ASHRAE-NIST-Refrigerants-Conference

On 15 March 2013, TEAP received the following correspondence from the European Commission:

Dear Ozone Secretariat:

Decision XXIV/7 invites Parties to submit information relevant to the work of the TEAP as outlined in paragraph 1 of XXIV/7, so that this information may be taken into account for the production of the TEAP draft report for consideration by the 33rd OEWG.

The European Union wishes to invite TEAP to take into account the following studies:

Schwarz et al. (2011): Preparatory study for a review of Regulation (EC) No 842/2006 on certain fluorinated greenhouse gases – Final Report.
http://ec.europa.eu/clima/policies/f-gas/docs/2011_study_en.pdf
Annexes:
http://ec.europa.eu/clima/policies/f-gas/docs/2011_study_annex_en.pdf

SKM Enviros (2012): Phase Down of HFC Consumption in the EU – Assessment of Implications for the RAC Sector.
SKM Enviros (2012): Further Assessment for Policy Options for the Management and Destruction of Banks of ODS and F-gases in the EU.
http://ec.europa.eu/clima/policies/ozone/research/docs/ods_f-gas_destruction_report_2012_en.pdf

Umweltbundesamt (2011): Avoiding Fluorinated Greenhouse Gases – Prospects for Phasing out.
European Commission (2012): IMPACT ASSESSMENT - Review of Regulation (EC) No 842/2006 on certain fluorinated greenhouse gases
http://ec.europa.eu/clima/policies/f-gas/legislation/docs/swd_2012_364_en.pdf

Yours sincerely,
Dr. ARNO KASCHL
Policy Officer
European Commission
Directorate-General for Climate Action
Transport & Ozone

BU-24 -1/33
B-1049 Brussels/Belgium

On 8 April 2013, the Commission submitted four reports, on renewable cooling and sustainable cooling for datacenters and on fishery to the TEAP Task Force.

10.2 Submissions received during MOP-25, June 2013

At the time of the MOP-25, the EU submitted a large number of observations on the oral presentation, the presentation in the report as well as comments to the draft report (as published May 2013 on UNEP's website). The comments submitted (on structure and presentation, as well as on the content, are given below:

> <u>On structure and presentation</u>
>
> A concise overview of the information on the market penetration of alternatives should be provided. The Executive Summary of the refrigeration and air-conditioning (RAC) section could benefit from better structure and good use of tables. The table in the foams ODS alternatives section (Section 4.1) is a good example of a useful summary table. Perhaps similar tables could be used in all other sections? Sections 3.2 to 3.8 would also benefit from better structure and use of tables.

Section 3.9 (on negative impacts) is not clear and might also benefit from use of tables and graphs. Section 4 on foams has good information on alternatives, but the “story line” is lost because of the complex graphs and discussion about negative impacts. It may be better to split the foams chapter into 2 parts – the first can deal with alternatives and the second can address negative impacts. It may then be easier to read this very long chapter.
The various tables used in the market sector sections of Section 4 (Sections 4.2 to 4.9) get very repetitive as many of the features are the same in each market. Can the layout be simplified to avoid so much repetition?
The tables in Section 6.4 are not clear – in particular the columns containing “good”, “difficult” etc. have no headings.

Comments on the content

In the assessment of the various alternative refrigerants, the suitability of substances as drop-in alternative should be discussed and more clearly indicated. In this context an assessment of R-407F is missing. Also the economic implications of using drop-in alternatives as intermediate solution should be discussed.

3.3.2 Commercial Condensing Units
Emerging unsaturated H(C)FCs and blends are contenders for small condensing units. Pure unsaturated HFCs (e.g. 1234yf) may be applicable for chilled displays, but will be less applicable to frozen temperature levels, where blends such as L40 would be more suitable.

3.3.3 Commercial Central Refrigeration
The description of refrigerants used in commercial refrigeration stand-alone equipment covers HFCs, HCs, and R744. While the summary comprises some information on prices related to the use of HCs no information on energy-efficiency is given. On the other hand rather detailed information is given on stand-alone equipment with HFC-1234yf which currently does not play a significant role. However, in spite of the rather detailed information no useful information on prices is included. In order to come up with a useful summary we suggest giving information on the most important aspects, energy-efficiency, availability and costs for the alternatives.
Regarding lower GWP options the executive summary states that ”HFC-134a can be replaced by HFC-1234yf or HFC-1234ze where the lower flammability of these refrigerants can be addressed during the design stage”. However, no information is given on costs, availability or energy-efficiency.

HCs as a low GWP option are already installed in more than 100 supermarkets and perfectly appropriate for higher ambient temperatures. Despite this, these are not even mentioned. In any case we consider it helpful to indicate the number of installations, of R-744 applications as well as other intermediate solutions mentioned in the report, inter alia R-407F, DR 33 or N40.
R-407F should have be mentioned as a viable an intermediate solution (GWP 1820) to avoid a transition to R-404A, instead of focussing only on some yet unknown HFC blends like N-40.
A range of options are described by TEAP for supermarket pack systems. They state that ammonia is an efficient option for supermarkets. However, this is not supported by experience in the EU which has shown it is quite difficult to use ammonia efficiently.
Some information is given about the use of CO_2, although this is not very detailed or up to date. The latest developments in the EU seem to go beyond the comments made about CO_2 in the TEAP report. They confirm the difficulties of using CO_2 transcritical systems at high ambients, but they do not clarify that cascade systems are quite cost competitive and more efficient in hot countries.

3.5 Industrial Refrigeration
Section 3.5 is entitled “Large size (industrial refrigeration)”. It is important to note that the report makes relatively little mention of the numerous small systems used in industry. Whilst it does state that industrial systems range in capacity from 10 kW to 10 MW, there is no discussion of

alternatives for small industrial systems. However, the comments in Section 3.1 of the report confirm that ammonia and CO_2 are not cost effective in small sizes (below 400 kW for ammonia and below 50 kW for CO_2).
This is not a very detailed section. It supports the use of ultra-low GWP alternatives for large sizes, but does not clarify the difficulties in the 10 to 100 kW size range and the likely need for moderate GWP refrigerants for these applications.

<u>3.6.1 Hermetic air-conditioning</u>
We are concerned that the second statement below is (a) not applicable to this type of equipment and (b) confusing two different types of cooling / heating. Some air-conditioning systems can supply cooling and heating simultaneously. In these circumstances CO_2 may have the advantages implied by this statement. However, this is an unusual configuration. A more common arrangement is a reversible system that provides heating in cold weather or cooling in hot weather. In these circumstances we do not agree with the TEAP statement.
"Due to efficiency implications, the use of cooling only R-744 systems is not really feasible. Where models are developed to also provide heating, this technology is considered to be more interesting".

<u>3.6.2 Split system DX air-conditioning</u>
Some of the comments do not reflect the state of the art e.g. (page 33) "Reversible air conditioners (heat pumps) are gaining market acceptance". In the EU the market for cooling only units is very small. Almost all systems now sold are reversible.
Regarding CO_2, TEAP generally support the view that CO_2 is not an efficient option for air-conditioning. However, one statement may need to be challenged as it does not agree with EU data e.g. from EcoDesign studies (page 33, "a reversible R-744 air conditioner can achieve the same seasonal efficiency as a state-of-the-art R-410A unit (Hafner, 2009)".
On page 34 the report indicates that HCs are an efficient low GWP alternative, although it is not very clear about size restrictions from a safety perspective. Regarding barriers to HCs they state: "that certain safety standards impose obstructive limits on refrigerant charge sizes for certain categories and characteristics of equipment". This is a slightly dangerous statement – the word "obstructive" seems to imply that the safety codes are only introduced as barrier without necessarily reflecting the real flammability risks.
The report also makes no mention that the use of pure HFOs for this market sector is a technically feasible option, but there are concerns about efficiency and cost.

<u>3.8. Vehicle Air-conditioning</u>
(p. 45 para 1): On what information source does the finding about the doubling of cost of R-744 MACs base and what is the 'baseline' referred to?
Regarding HFC-1234yf, there is a confusing statement on page 45: "The cost is announced to be 5 to 7 times more than that of HFC-134a systems". This sounds like the cost of the whole system, although this is clearly not the case. We believe they are referring only to the cost differential of the refrigerant itself, not the whole system.
There is no mention of the energy efficiency benefits of various refrigerants over R-404A (as listed in previous bullet) and the potential to retrofill R-404A systems in a cost effective way.
The discussion of CO_2 systems is not very clear – it certainly does not reflect the progress being achieved in the EU for both transcritical and cascade designs.
(p. 45 para 1) On what source do you base your information about CO_2 compressor tightness (shaft sealing) and who and what is meant by the expression 'no lessons learnt at large scale' in this context? When talking about past barriers, why do you not inform about the recent state and the solution gained. Our information is that the shaft sealing problem was solved.
(p.45 para 1) Why do you see the successful development of a R-744 compressor as a technical barrier for CO_2? Why do you not mention in this context, that finally in 2010 more than one company (at least four companies) developed compressors that met the harsh requirements by the European car producers?
(p. 45 para 5) For what purpose are the long ago rejected refrigerant options Fluid H and DP-1 from 2007/2008 mentioned?

(p. 45 para 6) The report does not reflect all sides of the recent state of the HFC-1234yf safety discussion. Why does the report not mention that the German car manufacturers left officially the SAE CRP group and do work on a separate safety assessment? Why does the report not mention the safety issue in regards to HFC-1234yf and that the substance is still under investigation by German authorities?
(p. 45 para 7): There are different patent issues re. HFC-1234yf, one is the license for production patents, one is the use in cars, and another topic are antitrust investigations. If patents issues are mentioned they should be specified.
(p. 45 para 7): An LCCP analysis takes only into account the climate gases. That is a limited approach and not sufficient to judge a technology option fully. Beyond that the LCCP input data for the LCCP results in favour of HFC-1234yf are not officially available. Other calculations with the same method gave also very good results for R-744 in most of the climates and in average. Thus the question needs to be raised under which conditions the conclusion that HFC-1234yf is superior to R-744 is valid?
Section 6.10 provides an update on vehicle air-conditioning. Surprisingly it mentions the possible use of HCFC-1233zd – this should be checked as this is a very low pressure refrigerant suited to large centrifugal chillers. It seems most unlikely this will be suited to MACs.
(p. 46 para 6 and 7) As the report states, HCs are no option for public transport. This might be also be the case for the use of e.g. pure HFC-1234yf. Inflammable blends, if chosen by train producers in view of other alternatives, might be possible, but have to proof their feasibility in terms of other alternatives, might be possible, but have to proof their feasibility in terms of performance, long term stability, stability of the blend compositions, MAC materials stability and easy handling. Why are the future options not discussed with these open questions?
The incorrect information on air-based AC systems in German ICE trains would be deleted.

<u>Chapter 4 - Foams</u>
Please explain, why there are jurisdictions where manufacturing plants are coming under increasing pressure from local regulations on Volatile Organic Compound regulations. Which countries or regions are involved? We can't realize why the use of hydrocarbon blowing agents is coming under pressure, particularly for extruded polystyrene technologies as a result of the more stringent application of fire codes. Could you explain this more detailed?

<u>Chapter 5 - Fire Protection</u>
In the executive summary TEAP states, that 2-Bromo-3,3,3-trifluoropropene could be the natural replacement for HCFC-123 and halon 1211. Could the Task Force explain why?

<u>Chapter 6 Solvents</u>
In chapter 6.4 are tables for different applications. There are two columns with "Good" and "Difficult". Could the Task Force explain the meaning and the source for this evaluation?

10.3 Submissions received around the middle of July 2013

During the MOP-25, an informal contact group of Parties discussed with the TEAP Task Force co-chairs where the draft Task Force report would benefit from modifications and adjustments. It was agreed by the group that Parties could submit suggestions to the Task Force before 15 July 2013, which should be considered in revising the draft Task Force report.

In the course of July, the Task Force received

- a number of references (mainly website addresses) from the EC (see below)
- a marked up version of the draft report from the government of Japan
- three slides from the government of Japan on alternatives to high GWP substances, on literature, and on the commercialisation of products by Japanese companies
- comments from a non-Party, the NGO company Shecco

Additional comments from the EC

From: Philip.Owen@ec.europa.eu [mailto:Philip.Owen@ec.europa.eu]
Sent: Mon 7/22/2013 5:24 PM
To: lambert.kuijpers@kpnmail.nl
Cc: meg.seki@unep.org; Cornelius.RHEIN@ec.europa.eu; Arno.KASCHL@ec.europa.eu
Subject: Late submission as regards update of volume II of the 2013 TEAP report

Dear Lambert

Better late than never we came across these Shecco publications that may be of use in your work.

shecco (2013), Examples of NH3/ CO_2 secondary systems for cold store operators, http://guide.shecco.com/GUIDE-NH3- CO_2-Secondary-Systems-2013.php

shecco (2013), ATMOsphere America 2013, 18-19 June 2013, Washington DC, conference summary report, http://www.atmo.org/files/reports/atmo_america_report.pdf

shecco (2012), ATMOsphere Europe 2012, 5-7 November 2012, Brussels, Belgium, conference summary report, http://www.atmo.org/files/reports/atmo_report_2.pdf

Best wishes
Philip
Philip Owen
Head of Unit

European Commission
Directorate-General for Climate Action
Unit C2 – Transport and Ozone

11 List of acronyms and abbreviations

ABC	Dry Chemical Powder
AIHA	American Industrial Hygiene Association
ASTM	American Society for Testing and Materials
BTP	Bromotrifluoropropene
CEFIC	European Chemical Industry Council
CEN	European Committee for Standardisation
CFC	Chlorofluorocarbon
CO_2	Carbon Dioxide
COP	Coefficient of Performance
CTOC	Chemicals Technical Options Committee
EC	European Commission
EPA	US Environmental Protection Agency
EU	European Union
FIC	Fluoroiodocarbon
FK	Fluoroketone
FTOC	Foams Technical Options Committee
GWP	Global Warming Potential
HARC	Halon Alternatives Research Corporation
HCFC	Hydrochlorofluorocarbon
HCFO	Hydrochlorofluoroolefin
HCO	Oxygenated hydrocarbon
HFC	Hydrofluorocarbon
HFE	Hydrofluoroether
HFO	Hydrofluoroolefin
HTOC	Halons Technical Options Committee
IIR	International Institute for Refrigeration
IMO	International Maritime Organisation
IPCC	Intergovernmental Panel on Climate Change
ISO	International Organisation for Standardisation
LCA	Life Cycle Analysis
LCCP	Life Cycle Climate Performance
VCLCG	Liquefied Compressed Gas
Mt	Mega tonnes (one million tonnes)
MT	Metric Tonnes
NFPA	National Fire Protection Association
NOAEL	No Observed Adverse Effect Level
n-PB	n-Propyl Bromide
ODP	Ozone Depletion Potential
ODS	Ozone Depleting Substance
OEL	Occupational Exposure Limit
PFC	Perfluorocarbon
RTOC	Refrigeration AC and Heat Pumps Technical Options Committee
SNAP	Significant New Alternatives Policy
STOC	Solvents, Coatings and Adhesives Technical Options Committee
TEAP	Technology and Economic Assessment Panel
TEWI	Total Equivalent Warming Impact
TLV	Threshold Limit Value
UL	Underwriters Laboratories Inc.
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
VOC	Volatile Organic Compound

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