Refrigeration Coolers Market

July 2026



xResearch

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43.7. GEA Group Aktiengesellschaft

43.8. Güntner GmbH & Co. KG

43.9. EVAPCO, Inc.

43.10. Thermofin GmbH

43.11. Copeland LP

43.12. Other Players

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Disclaimer

1. Introduction

1.1. Report Description

Refrigeration Coolers are temperature-controlled cooling systems designed to maintain products, materials, and environments within a specified temperature range for preservation, storage, processing, and transportation purposes. These systems are widely utilized across food & beverage processing, retail refrigeration, healthcare & pharmaceuticals, and cold chain logistics & warehousing among other applications to ensure product quality, safety, and regulatory compliance. Refrigeration coolers comprise key offering such as compressors, condensers, evaporators, expansion valves, and air coolers among others, which operates on various refrigerants including carbon dioxide (CO_2), ammonia, HFC/HFO, and hydrocarbon-based solutions. The refrigeration coolers market encompasses stationary and portable cooling systems deployed across commercial, industrial, and institutional settings. Growing emphasis on energy efficiency, sustainability, and the adoption of low-global warming potential (GWP) refrigerants is accelerating the transition toward advanced refrigeration technologies worldwide.

Refrigeration coolers market report by xResearch provides market analysis of this industry including market drivers, key players, industry structure and dynamics, business strategies for success, and threats or opportunities.

1.2. Research Methodology

Secondary Research: The process begins with extensive secondary research through various sources to carry out the qualitative and quantitative methodologies specific to respective industry. The sources that are referred/included in the report, but not restricted to: Government documents, legal databases, Statistical reports, Industry documents Company websites, Annual reports, U.S. Security and Exchange Commission (SEC) filings, Financial reports, Investors' reports/presentations, comprehensive databases (For example Economic Intelligence unit, EIU), Media house news, press releases and news articles published by top industry players.

Primary Research: The process includes research interviews of various industry experts, veterans and top-level people from industry's' major players in order to authenticate and strengthen the data and research analytics. Primary research includes questionnaire, telephonic interviews, e-mails, face-to-face interviews etc. The members who ordinarily participate in such a procedure incorporate, but are not restricted to: Participants from the Industry- CEO, CTO, CFO, marketing head/managers, Vice-president, Directors, etc. Outside Industry experts: Financial institutes viz. bankers and Investors etc.

After understanding the market from primary and secondary research, our consultant use their extensive years of experience in the industry. Once a fair, concrete understanding of the market is developed, we help our clients to understand the market demand and opportunity in near future through actionable insights in a dynamic marketplace environment.

1.3. Report Assumptions & Acronyms Used

Assumptions

- The report provides market estimates for base year 2025 and a yearly forecast to 2036 in terms of revenue (USD Million). Market for each, offering, refrigerant, mobility, and application has been provided on a regional basis for historical (2021-2025) and the above-mentioned forecast period.
- Key industry dynamics, regulatory scenario, major product trends, technology trend and application markets are evaluated to understand their impact on demand for the forecast period. Growth rates were estimated using correlation, regression and time-series analysis.
- We have used a bottom-up approach for market sizing, analyzing key regional markets, dynamics and trends for various products and services. Global market has been estimated by integrating regional markets.
- Market estimates have mainly been based on feedback obtained through primary interviews with key industry participants.
- Inflation has not been accounted for in order to estimate the market.
- Numbers may not add up due to rounding off.
- Regional segments include North America, Europe, Asia Pacific, South America and Middle East & Africa.

Acronyms

USD – United States Dollar

NA – North America

APAC – Asia Pacific

SA – South America

ME&A - Middle East & Africa

2. Executive Summary (1/5)

Key Stats – Refrigeration Coolers Market

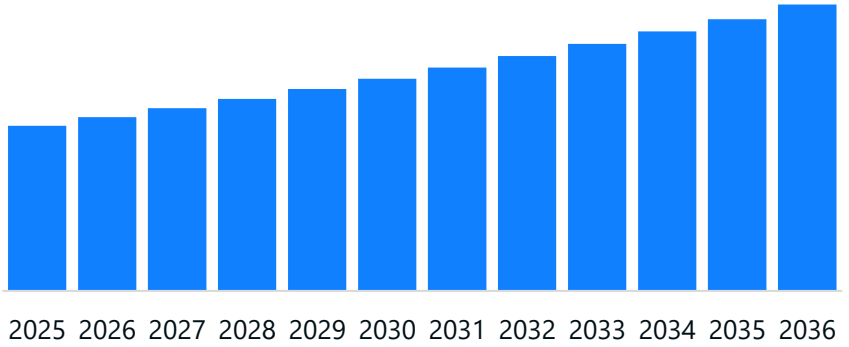
X.X%
CAGR 2026-2036

Asia Pacific
Max $ Opportunity

Compressors
Leading Segment

Asia Pacific
Growth Market

Refrigeration Coolers Market (USD Million) 2025-2036



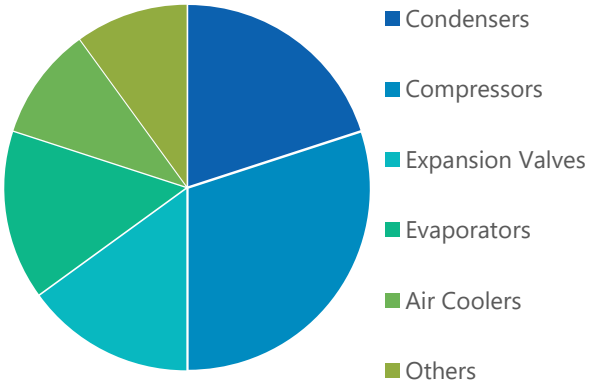
Source: xResearch Analysis

Key Highlights

- The refrigeration coolers market is anticipated to reach USD XXX.X million by 2036 from USD XXX.X million in 2025, at a CAGR of XX.X% during the forecast period. The refrigeration coolers market has shown rapid growth since past few years. The growth in mainly driven by the rapid expansion of cold-chain logistics infrastructure, rising food and beverage processing capacity, growing pharmaceutical cold-storage compliance requirements, and the regulatory-driven shift toward low-GWP natural refrigerants, alongside sustained retailer capital investment directed toward energy-efficient, IoT-enabled refrigeration fleets.
- The refrigerant transition is a structural driver reshaping the market, pulling capital toward CO2, ammonia, and hydrocarbon-based systems capable of meeting Kigali Amendment, EU F-Gas, and US AIM Act phase-down schedules. Rising investment from retail, pharmaceutical, and data center operators is diversifying deployment beyond conventional food retail into cold-chain logistics and electronics cooling. Moreover, standards convergence around energy-efficiency benchmarks and smart monitoring protocols is easing multi-vendor interoperability, which is expected to further boost the refrigeration coolers market during the forecast period 2026-2036.

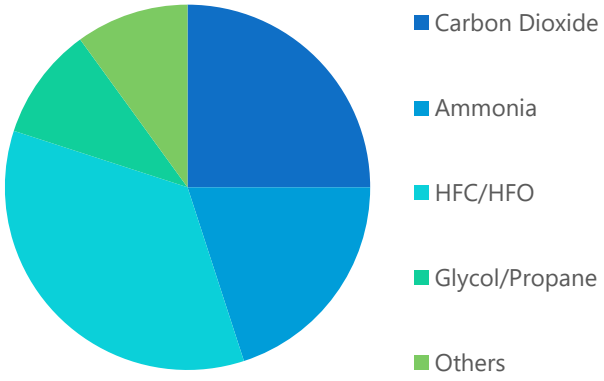
2. Executive Summary (2/5)

Segmentation Analysis By Offering



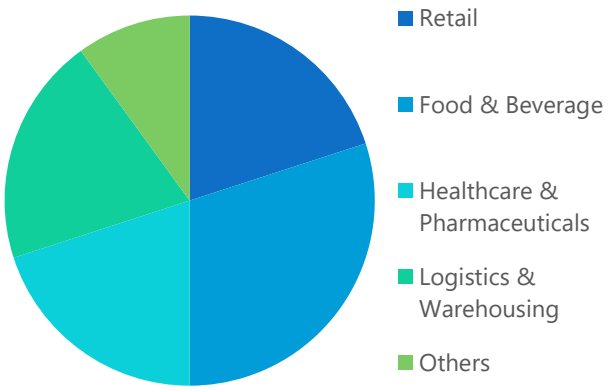
Source: xResearch Analysis

Segmentation Analysis By Refrigerant



Source: xResearch Analysis

Segmentation Analysis By Application



Source: xResearch Analysis

Key Highlights

- The refrigeration coolers market is segmented into six segments based on offering: condensers, compressors, expansion valves, evaporators, air coolers, and others. Among these, the compressors segment is expected to dominate the market in terms of market share, while the air coolers segment is predicted to grow at the highest rate in terms of CAGR during the forecast period.
- Based on refrigerant, the market is segmented into carbon dioxide, ammonia, HFC/HFO, glycol/propane, and others. Among these, the HFC/HFO segment is expected to be the largest in terms of market share, while the carbon dioxide segment is forecasted to grow at the highest rate in terms of CAGR during the forecast period.
- On the basis of application, the market is segmented into retail, food & beverage, healthcare & pharmaceuticals, logistics & warehousing, and others. Among these, the food & beverage segment is expected to be the largest in terms of market share, while the healthcare & pharmaceuticals segment is predicted to grow at the highest rate in terms of CAGR during the forecast period.

2. Executive Summary (3/5)

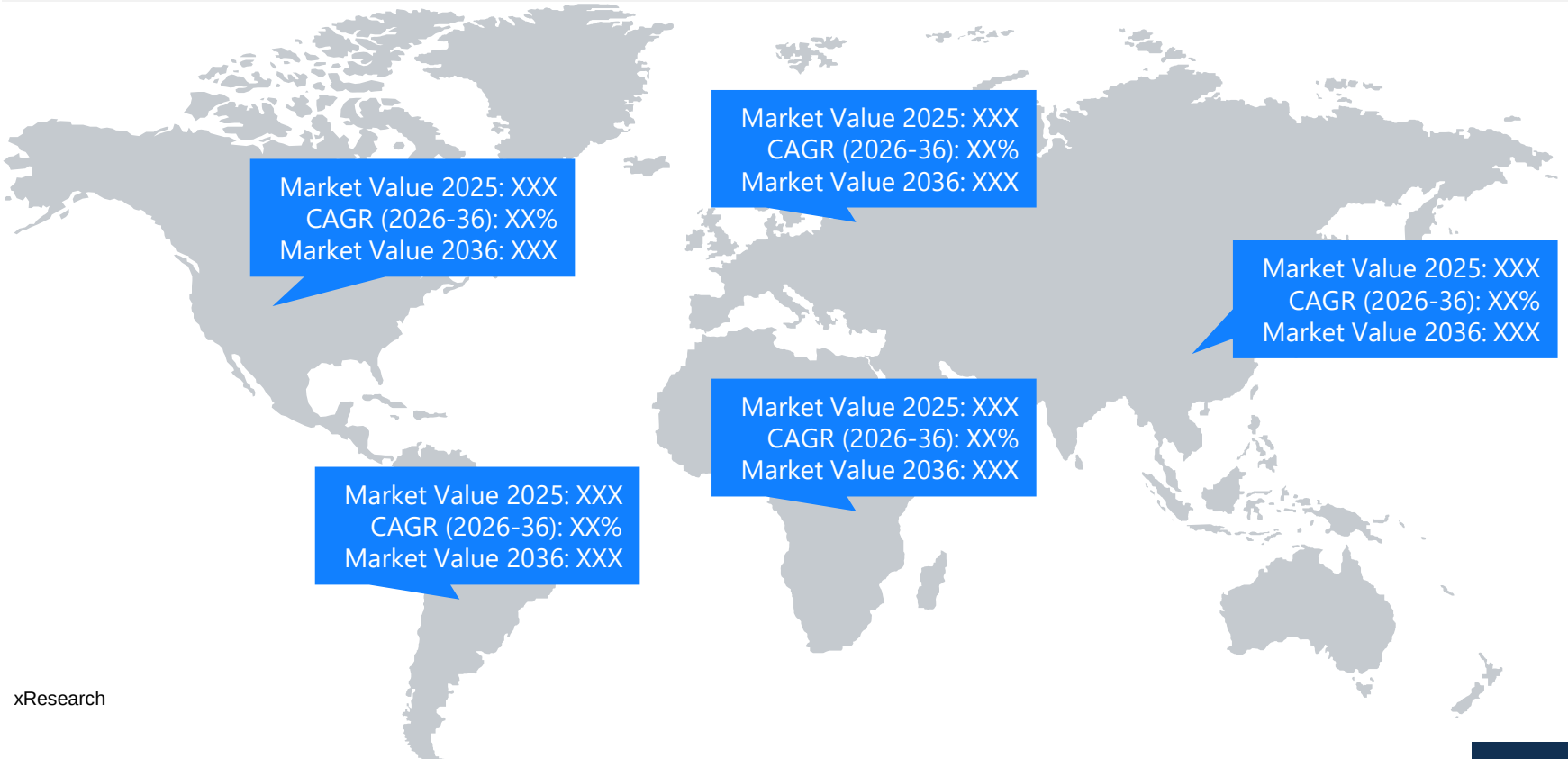
Key Highlights

- Asia Pacific was held to be the largest market in 2025 for the refrigeration coolers on the global scale. Moreover, the region is expected to maintain its position further during the forecast period of 2026-2036.
- Asia Pacific region's dominance stems from large-scale retail modernization, expanding cold-chain logistics infrastructure, and rapid food and beverage processing capacity additions across China, India, Japan, South Korea, and South-East Asia. Asia Pacific market leadership is underpinned by aggressive investment in pharmaceutical cold-storage capacity, government-backed cold-chain development programs, and rising urbanization-led demand for packaged and frozen foods. Moreover, rising adoption of energy-efficient and natural refrigerant-based systems, and the presence of competitive local equipment manufacturers across the region supports innovation, and cost-competitive supply in APAC, which is expected to further drive the market growth in the region during the forecast period 2026-2036.
- North America remains a mature and significant market for refrigeration coolers, supported by a dense cold-chain logistics network, high concentration of food and beverage processing facilities, and established retail and supermarket infrastructure across the region. North America's market strength is underpinned by sustained capital investment from leading retail chains and cold-storage operators directed toward energy-efficient refrigeration upgrades, alongside stringent EPA AIM Act-driven refrigerant transition mandates and a strong domestic manufacturing base led by Johnson Controls, and Copeland among others. Moreover, growing collaboration between equipment OEMs, refrigerant suppliers, and pharmaceutical cold-chain operators to co-optimize energy efficiency and compliance, which is expected to further boost the market growth in the region during the forecast period 2026-2036.
- The top 10 players account for XX.X% of the market. The industry is highly competitive and companies are adopting a mix of business strategies in order to acquire market share.
- Major companies operating in the market are adopting business strategies like product innovation, R&D, expansion, acquisition, mergers,

2. Executive Summary (5/5)

Refrigeration Coolers Market by Region

The Asia Pacific region is forecasted to maintain its dominant position in the global refrigeration coolers market, accounting for a projected market share of XX.X% in 2025. The regional refrigeration coolers market is mainly driven by rapid retail modernization, rising cold storage capacity build-out, and a growing base of food and beverage processing operations. Expanding pharmaceutical manufacturing and vaccine distribution networks, alongside government-backed cold-chain development programs, continue to fuel regional demand. Furthermore, the presence of established local equipment manufacturers, coupled with rising urbanization and shifting dietary patterns toward packaged and frozen foods, reinforces the region's competitive edge. Moreover, ongoing investment in energy-efficient compressors and natural refrigerant-based systems, is predicted to further drive the refrigeration coolers market in the region during the forecast period 2026-2036.



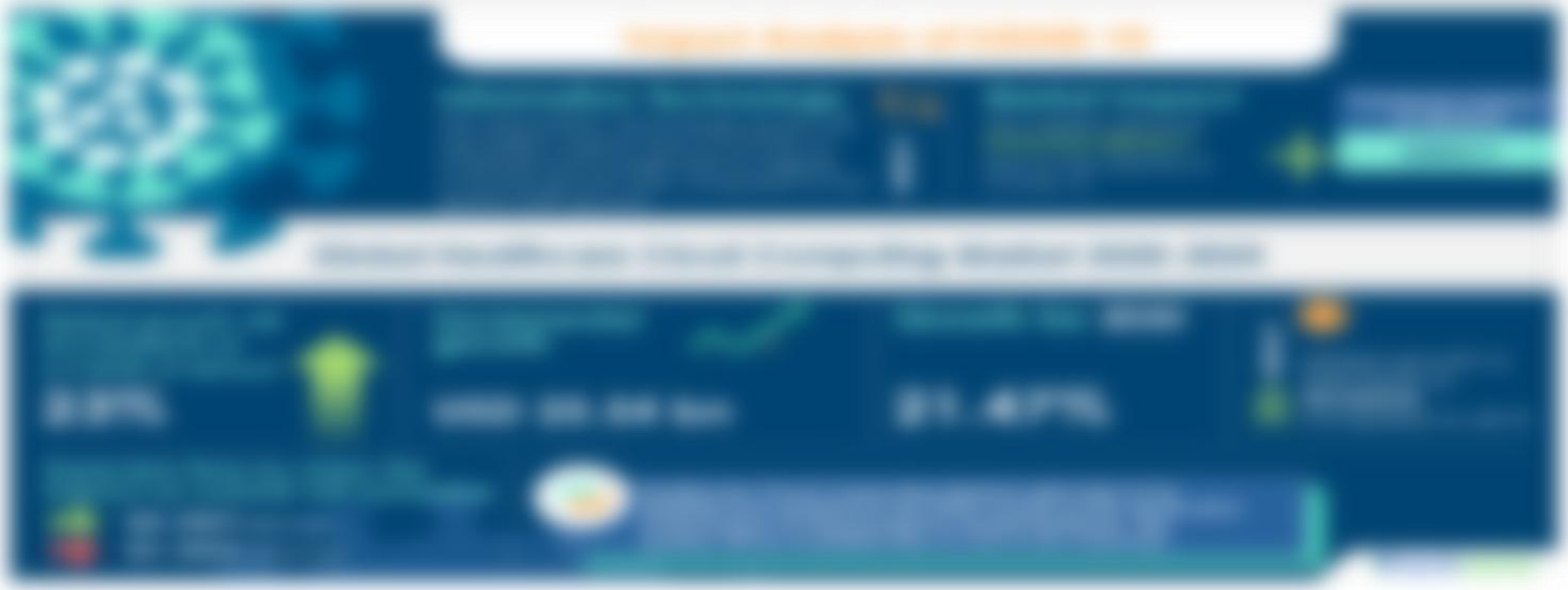
3. Value Chain Analysis

Value Chain Analysis of Refrigeration Coolers Market

The value chain analysis of the refrigeration coolers market helps to identify the key stages and players involved in the production and distribution of refrigeration coolers products & offering.

Sample

Sample



6. Key Market Indicators

Key Market Dynamics



Rapid Expansion of Cold-Chain Logistics Infrastructure



Rising Food and Beverage Processing Capacity

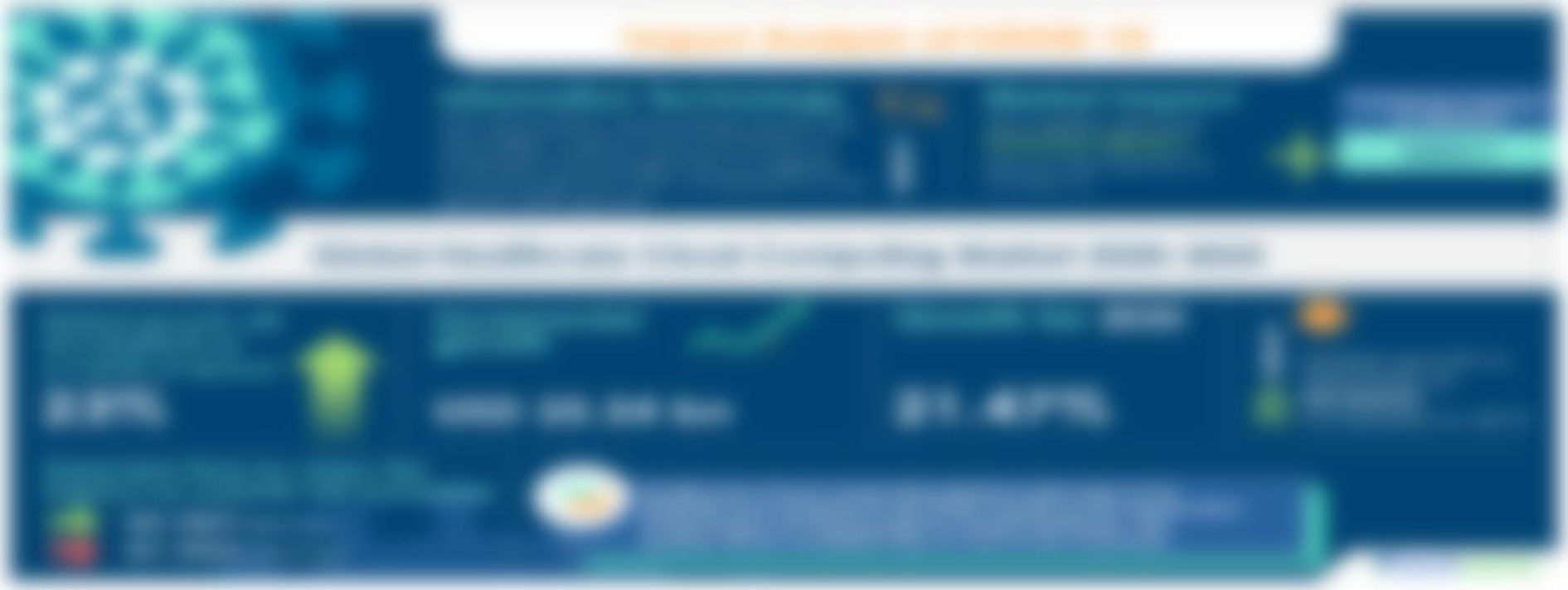


Growing Pharmaceutical Cold-Storage Compliance Requirements

Introduction

- The continuous expansion of cold-chain logistics infrastructure is a major growth driver for the refrigeration coolers market. Increasing global demand for temperature-controlled transportation and storage of perishable food products, pharmaceuticals, vaccines, and biologics is driving substantial investments in refrigerated warehouses and cold-storage facilities. For instance, according to the Global Cold Chain Alliance (GCCA), the world's top 25 temperature-controlled warehousing and logistics operators now manage 7.76 billion cubic feet (219.7 million cubic meters) of cold storage space, a 6.3% increase from 2025 and part of a six-year run in which total capacity has grown 41.2% since 2021. This scale of capacity expansion is pushing operators toward higher-throughput, energy-efficient refrigeration systems, which in turn propels market growth.
- Rising food and beverage processing capacity is significantly increasing the adoption of refrigeration coolers. Government-backed capacity expansion is a key contributor. For instance, according to the US Department of Agriculture (USDA), the meat and poultry processing expansion program (MPPEP) has allocated USD 325 million across 74 projects, increasing annual US processing capacity by more than 800,000 cattle, 14,000 hogs, 23 million chickens, and 5 million turkeys, with a further USD 60 million released in a fourth funding round in June 2026 to expand small and mid-size processor capacity. This scale of processing capacity investment is driving parallel demand for refrigeration coolers.
- Growing pharmaceutical cold-storage compliance requirements are creating substantial demand for precision refrigeration infrastructure. The World Health Organization mandates that vaccines and biologics be stored and distributed within a strict 2°C to 8°C range throughout the supply chain, with WHO Performance, Quality and Safety (PQS) standards defining minimum criteria for cold chain equipment, maintenance, calibration, and documentation.

Sample



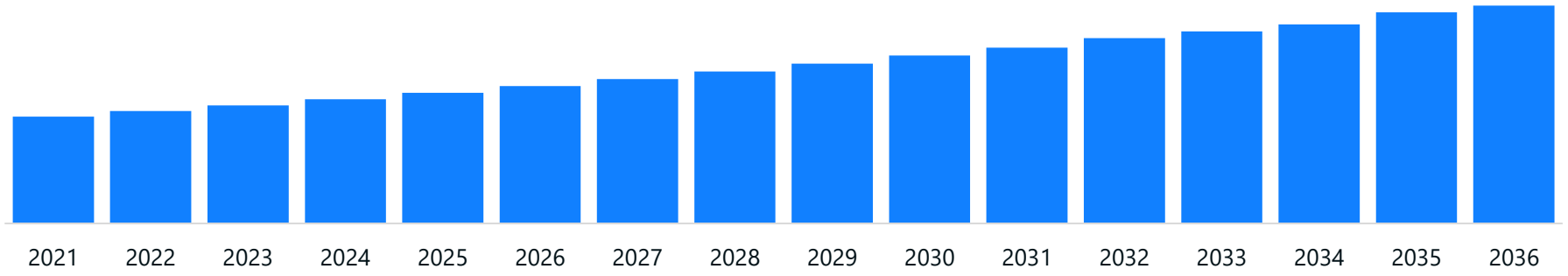
8. Refrigerant Transition & Decarbonization Roadmap

8.1. Kigali Amendment, EU F-Gas Regulation & US AIM Act: HFC Phase-Down Schedules by Region

Sample

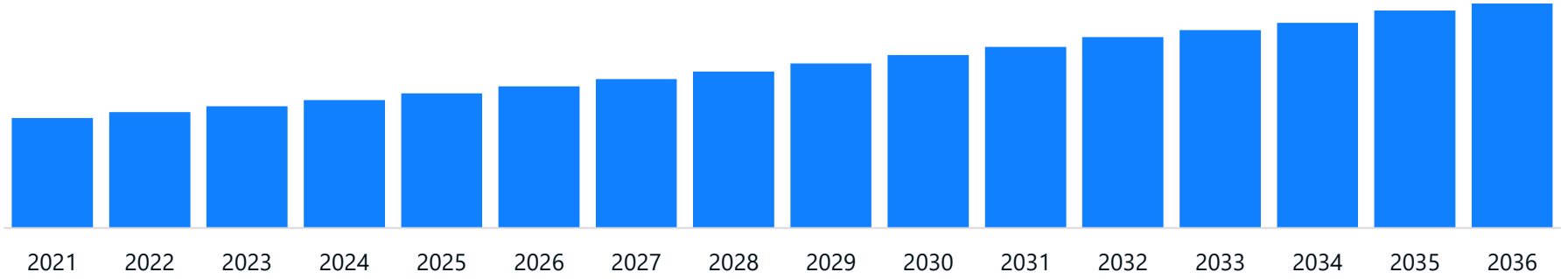
8.2. Natural Refrigerant Adoption Curve & Penetration Forecast 2026–2036

9.1.1. CO2



Source: xResearch Analysis

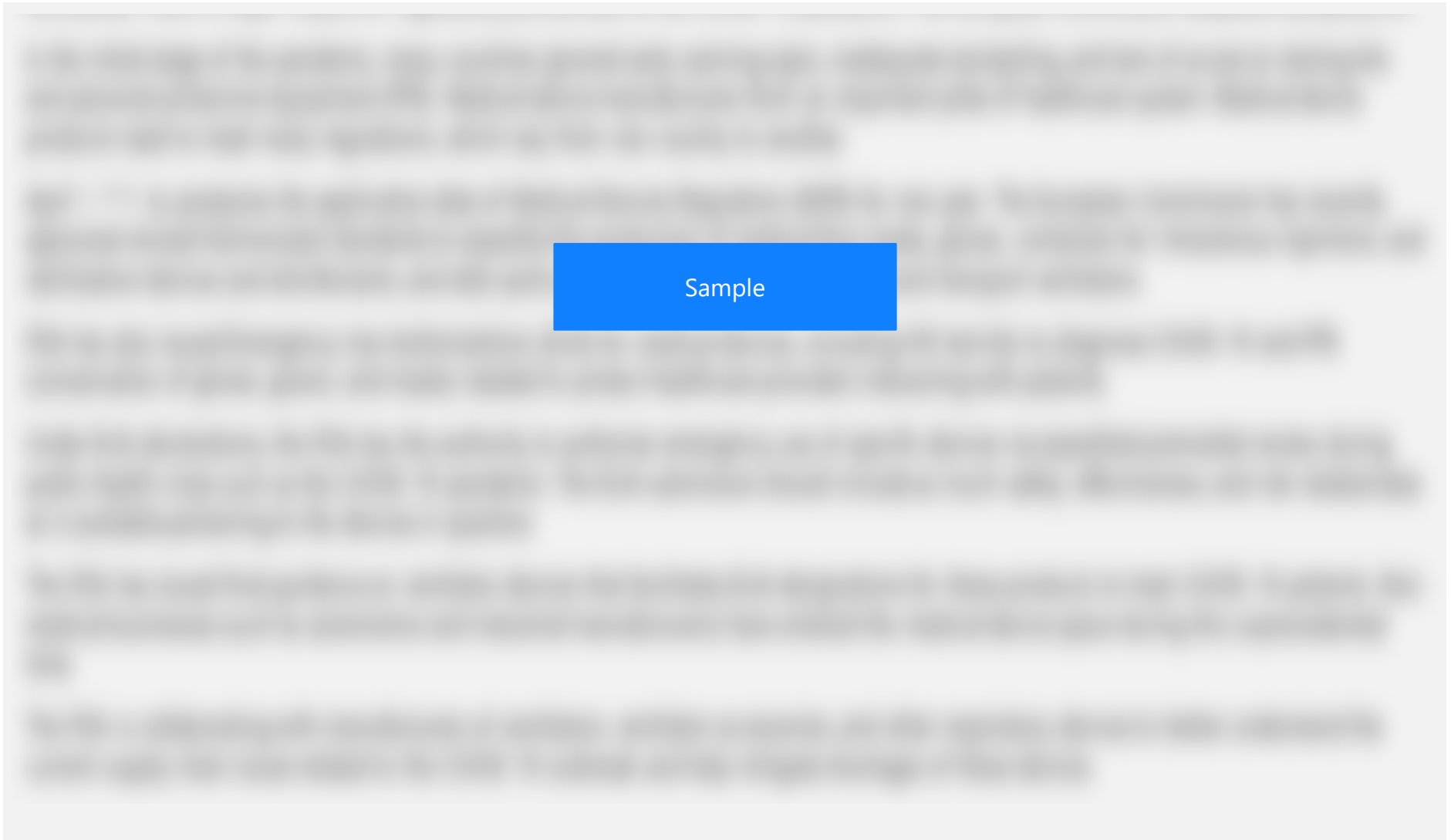
9.1.2. Ammonia



Source: xResearch Analysis

9. Technology & Innovation Benchmarking

9.1. Smart/IoT-Enabled Refrigeration: Remote Monitoring & Predictive Maintenance Adoption



13.2. Refrigeration Coolers Segmentation Analysis

Refrigeration Coolers Market By Offering – Global Market Analysis 2025-2036

- The condensers accounted for a share of XX.X% of the refrigeration coolers market in 2025. This segment is projected to reach USD XX,XXX.X million by 2036 from USD X,XXX.X million in 2025, at a CAGR of X.X% during the forecast period.
- The compressors segment is expected to hold the CAGR of X.X% during the forecast period. This segment is predicted to reach USD X,XXX.X million by 2036 from USD X,XXX.X million in 2025.

Figure: Refrigeration Coolers - Global Market Value ($ Million) 2025-2036

By Offering	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	CAGR
Condensers	X	X	X	X	X	X	X	X	X	X	X	X	X%
Compressors	X	X	X	X	X	X	X	X	X	X	X	X	X%
Expansion Valves	X	X	X	X	X	X	X	X	X	X	X	X	X%
Evaporators	X	X	X	X	X	X	X	X	X	X	X	X	X%
Air Coolers	X	X	X	X	X	X	X	X	X	X	X	X	X%
Others	X	X	X	X	X	X	X	X	X	X	X	X	X%
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X%**

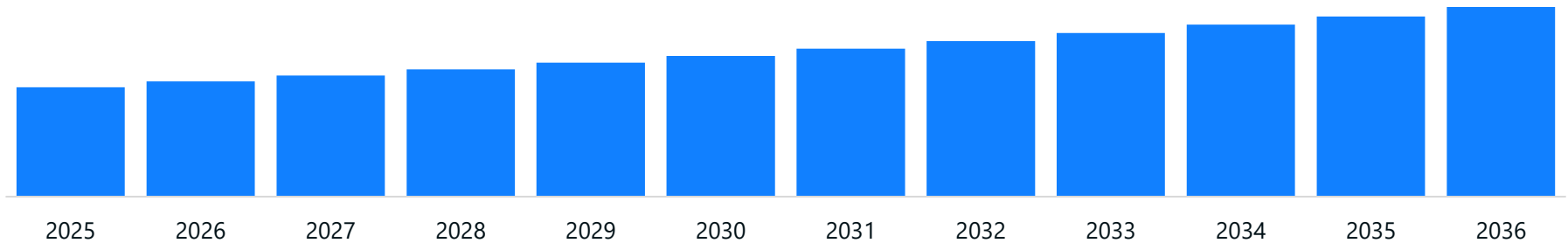
Source: xResearch Analysis

13.1.1. Condensers

Introduction

- The market size of the condensers segment was USD XXX million in 2025. It is expected to grow at a CAGR of XX.X% during the forecast period i.e. 2026-2036. Condensers represent a critical component of refrigeration coolers, facilitating the transfer of heat from the refrigerant to the surrounding environment and enabling efficient cooling performance. Their widespread adoption across commercial refrigeration, food processing facilities, cold storage warehouses, supermarkets, pharmaceutical storage units, and industrial refrigeration systems continues to support segment growth globally.
- The increasing adoption of energy-efficient refrigeration systems, cold-chain infrastructure expansion, and stricter refrigerant regulations is significantly driving demand for advanced condenser units, as operators prioritize higher heat-rejection efficiency to offset the reduced thermal performance of low-GWP refrigerants. Furthermore, growing investments by leading manufacturers in microchannel and V-coil condenser designs are enabling the segment to keep pace with rising energy-efficiency mandates and compact footprint requirements of modern retail and cold storage facilities. Moreover, the shift toward evaporative and hybrid condensers for water-scarce regions continues to make condensers a critical differentiator for total system efficiency, which is expected to further boost the market growth of the urine samples segment during the forecast period 2026-2036.

Figure: Condensers - Global Market Value ($ Million) and Forecast 2025-2036



Source: xResearch Analysis

14. Regional Analysis

Refrigeration Coolers By Region – Global Market Analysis 2025-2036

- Asia Pacific refrigeration coolers market is forecasted to reach USD X,XXX.X million in 2036 from X,XXX.X million in 2025. Asia Pacific holds the largest market for refrigeration coolers.
- Asia Pacific is expected to hold the highest CAGR during the forecast period 2026-2036. The growth is attributed to the substantial investments in cold-chain infrastructure, food processing facilities, and temperature-controlled logistics networks. Governments across the region are actively promoting cold-storage development to reduce post-harvest losses and improve food security.
- North America followed by Europe, Latin America & Middle East & Africa will have a significant market share during the forecast period.

Figure: Refrigeration Coolers – Regional Market Value ($ Million) 2025-2036

Region	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	CAGR
North America	X	X	X	X	X	X	X	X	X	X	X	X	X%
Europe	X	X	X	X	X	X	X	X	X	X	X	X	X%
Asia Pacific	X	X	X	X	X	X	X	X	X	X	X	X	X%
Latin America	X	X	X	X	X	X	X	X	X	X	X	X	X%
Middle East & Africa	X	X	X	X	X	X	X	X	X	X	X	X	X%
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X%**

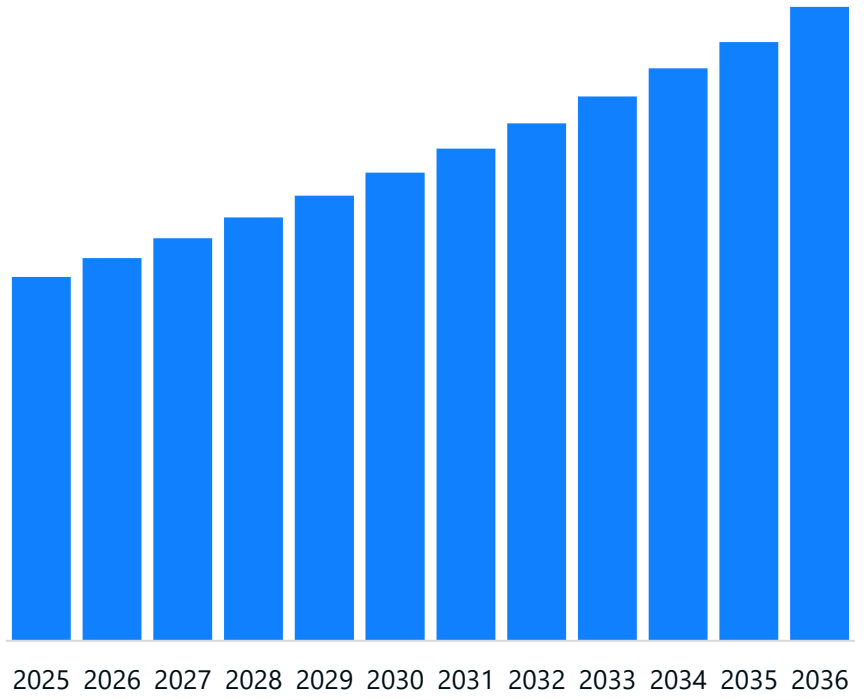
Source: xResearch Analysis

14.1. North America Market 2025-2036

North America Market 2025-2036

- North America accounted for a market share of XX.X% of the global refrigeration coolers market in 2025.
- The market is projected to reach USD X,XXX.X million by 2036 from USD X,XXX.X million in 2025, at a CAGR of X.X% during the forecast period. North America remains one of the most mature refrigeration markets globally, supported by a highly developed cold-chain ecosystem, extensive refrigerated warehousing capacity, and strong demand from food retail, foodservice, healthcare, and pharmaceutical industries across the United States and Canada.
- North America's regional growth is driven by sustained cold storage capacity expansion and regulatory-mandated refrigerant modernization. For instance, according to the Global Cold Chain Alliance (GCCA), North America's Top 25 temperature-controlled warehousing operators expanded capacity by 260 million cubic feet in 2025, now operating 5.26 billion cubic feet (148.9 million cubic meters) of cold storage space. Additionally, the US Environmental Protection Agency's AIM Act continues to phase down high-GWP refrigerants, compelling operators to retrofit and replace legacy equipment
- Moreover, growing adoption of natural refrigerants, smart monitoring technologies, and high-performance cooling solutions, is expected to further drive the market growth in the region during the forecast period 2026-2036.

Figure: North America Market Size ($ Million) 2025-2036



Source: xResearch Analysis

15. United States Market

Country Information

- United States total GDP was $X.X trillion in XXXX accounting for X.X% of $XX.X trillion global GDP. The country had a total population of XXX.X million accounting for around X.X% of the global population.

Market Information

- United States was among the most prominent countries in the refrigeration coolers market among the major countries covered in the report and was worth $XXX.X million in 2025. The market accounted for X.X% of the country's GDP.
- The United States refrigeration coolers market is expected to maintain robust growth, majorly driven by continued cold storage capacity build-out, expanding meat and poultry processing infrastructure, and rising retrofit demand tied to EPA refrigerant transition mandates. Moreover, sustained federal support for domestic food processing capacity, coupled with growing private-sector investment in pharmaceutical and biologics cold-storage compliance, is expected to drive refrigeration coolers market in the country throughout the forecast period 2026-2036.

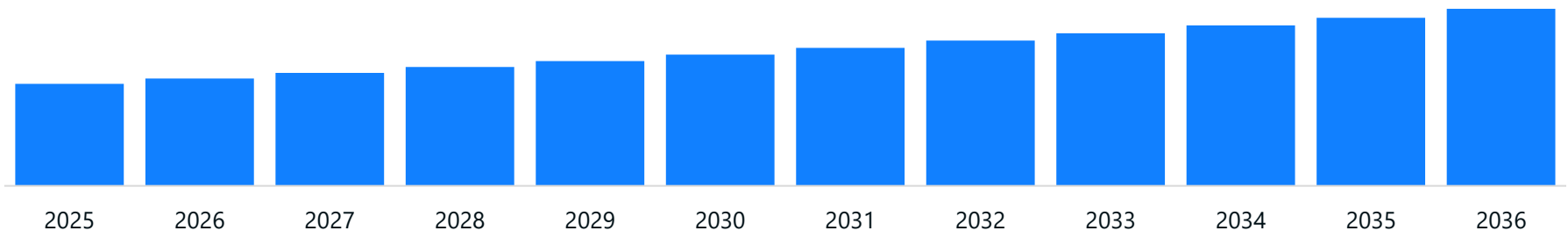
Impact of COVID-19

15.9. United States Market 2025-2036

Key Highlights

- United States refrigeration coolers market size stood at USD XXXX.X million in 2025. Further, it is predicted to expand at a CAGR of X.X% during the forecast period and reach USD XXXX.X million by 2036. The US represents one of the world's most mature markets for refrigeration coolers, supported by its dense network of retail chains, food processors, and cold storage operators. Rising retrofit demand tied to federal energy-efficiency mandates and the ongoing refrigerant transition continues to drive replacement and upgrade cycles across the installed base.
- The United States is also strengthening its position through regulatory-driven equipment modernization. For instance, according to the US Department of Energy, new energy conservation standards finalized for self-contained commercial refrigerators, freezers, and refrigerator-freezers take effect in 2029 and are expected to accelerate industry-wide adoption of R290 (propane) refrigerant, with DOE estimating that the broader refrigerant transition requires approximately USD 14.6 million in R&D and USD 19.0 million in capital expenditure investment industry-wide between 2024 and 2026. Furthermore, the US Census Bureau separately tracks private nonresidential construction spending in food, beverage, and tobacco manufacturing as a distinct category, reflecting sustained federal monitoring of capacity investment across processing and cold-storage-linked facilities, which is expected to further expand the market growth in the country during the forecast period 2026-2036.

Figure: United States Refrigeration Coolers - Market Value ($ Million) 2025-2036



Source: xResearch Analysis

38.1. Danfoss

COMPANY AT A GLANCE

1933 Founded	Nordborg, Denmark Headquarters	Private Ownership

Company Overview

- Danfoss is a Denmark-based multinational engineering company specializing in energy-efficient technologies, refrigeration and air-conditioning solutions, industrial automation, power electronics, and climate technologies. In 1933 Mads Clausen founded Dansk Køleautomatik- og Apparatfabrik, later in 1946 the company name was changed to Danfoss. The company is headquartered in Nordborg, Denmark.
- Danfoss designs, manufactures and sells a range of products and solutions for refrigeration, heating, air conditioning, motor control and off-highway machinery applications. Danfoss offers a range of products such as AC drives, valves, energy recovery devices, energy metering, pumps, SEM-safe fire safety, steering, software, filter driers, sight glasses and switches, sensors and transmitters, smart heating, stations, domestic hot water, radiator and room thermostats, electronic controls, differential pressure and flow controllers, condensing units, appliance controls, burner components, compressors.
- The company has more than 39,000 employees, and operates through a global network of sales in over 100 countries across Europe, North America, Asia Pacific, Latin America, Middle East & Africa.
- Danfoss offers a wide range of refrigeration coolers, which caters to the varying need of various applications. Its product offering includes the Turbocor®- Oil Free Compressor, Reciprocating compressors, Telecom DC compressors, NRV refrigeration check valves, OptymaTM Plus standard or multi-refrigerant condensing units and more.

Competing Markets (Companies which compete for same wallet share with (Danfoss))

Category	Competitors
Condensers	[illegible]
Compressors	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]

Business Strategy

- Danfoss's business strategy in the refrigeration coolers market is centered on accelerating the transition to natural refrigerants across its compressor and condensing unit portfolio. The company continues to expand its CO2 trans-critical systems manufacturing capacity to meet tightening F-Gas and AIM Act compliance timelines across Europe and North America.
- The company is also deepening its digital services strategy to capture recurring, high-margin service revenue. Danfoss has scaled deployment of its cloud-connected refrigeration monitoring platforms across supermarket and cold storage networks, enabling predictive maintenance and remote diagnostics for large multi-site retail and logistics customers.
- Danfoss is also pursuing growth through strategic acquisitions, technology partnerships, and expansion of its global manufacturing footprint. Investments in compressor technologies, heat exchangers, and advanced refrigeration controls enable the company to broaden its product portfolio while increasing its competitiveness across commercial refrigeration, industrial cooling, cold-chain logistics, and food retail applications.

Related Reports

Cold Chain Market

Coverage:

1.Country Data - More than 100+ countries
2.Market Value & Volume 2015-2030
3.Production Value & Volume 2015-2030
4.Future Market Scopes 2015-2030
5.Target Audience Segmentation
6.Product offering high growth opportunities
7.Countries offering opportunities for export
8.Segmentation Analysis
9.Competitive Analytics

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