Policies Enabling Transformation
Lessons from the EU F-Gas Regulation

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EU F-Gas Regulation as a driver

- Clear, long-term regulatory framework in the EU
- HFC phase-out creates price signals and provides planning certainty
- Binding F-Gas-bans (e.g. split ACs <12 kW from 2035) guide technology shift
- EU single market effect: rules apply to all manufacturers and importers

Market response

- Accelerating shift toward natural refrigerants
- Strong increase in R&D and product redesign
- Growing availability of R290-based solutions
- Early commercial deployment also visible in AC sector

Role of complementary measures

- EU level: binding HFC phase-out + prohibitions
- National level: incentives and funding schemes
- Additional support for F-gas-free equipment
- Phase-out of funding for F-gas-based systems

Case Example: Heat Pumps

- Rapid uptake of R290 monobloc heat pumps in EU markets
- Policy alignment triggered market tipping point
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Implications for split ACs in the EU

- Similar market dynamic as seen in monoblock heat pumps could be expected, where adoption accelerated rapidly once regulatory and technology readiness aligned.
- First R290 split AC systems already entering the EU market.
- Europe may serve as early regulatory reference market for global transition.

The shift is not a question of *if*, but of *how fast and how broadly it will scale.*

Key takeaways

- Policy frameworks can actively shape technology markets
- Clear regulatory timelines drive investment certainty
- Combination of bans + incentives accelerates transformation
- EU may act as early reference market for global cooling transition

Green Cooling Summit 2026

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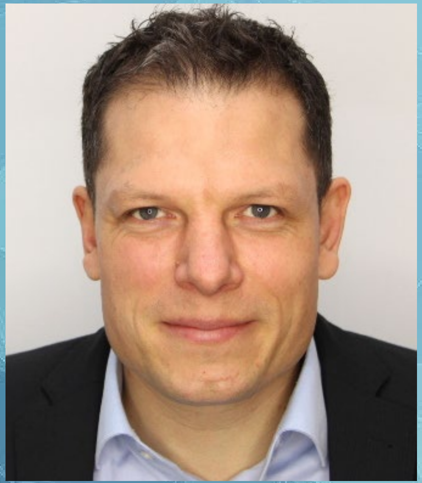
Contact



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