



AUSTRALIAN
REFRIGERATION
COUNCIL

AREMA Presentation

Susie O'Neill
Chief Operating Officer - ARC

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THE RAC INDUSTRY AT A GLANCE



Refrigeration and air conditioning (RAC) work involves the design, installation, commissioning, maintenance, repair and decommissioning of air conditioning and refrigeration systems in **stationary** (commercial and split systems) and **automotive** settings.



Increasingly referred to as the **climate control industry** - includes businesses and supporting organisations supplying refrigeration and air conditioning products and services to the commercial, domestic and automotive industries.



Diverse **range of settings** including domestic, food production, healthcare, office blocks, public transport, hospitality, retail, data centres, mining, manufacturing, agriculture, pharmaceuticals, and cold chain logistics.

THE RAC INDUSTRY AT A GLANCE

Economic impact	RAC industry energy spends \$18.9 billion New equipment \$12.7 billion 1 in 117 registered businesses hold an RTA
Employment	378,000 jobs, 2.6% of Australia's workforce Equipment stock: ~54 million units in 2016 to ~62 million in 2022 Refrigerated vehicles: ~38,000 to ~59,000
Emissions	Total RAC emissions: ~58.5 Mt CO₂-e Direct emissions (refrigerant leakage): 6.9 Mt CO₂-e Indirect emissions (energy use): 51.6 Mt CO₂-e Share of national emissions: ~12.6% End-of-life emissions: ~4.9 Mt CO₂-e Combined total (including EOL): ~63.4 Mt CO₂-e

Electricity Consumption	Total RAC electricity use: 66,700 GWh 24.4% of national electricity production Breakdown: • Stationary AC and heat pumps: 56% • Cold chain (excl. domestic): 30% • Domestic refrigeration: 13% • Mobile AC: 0.3%
Refrigerant bank	Estimated 55,000 tonnes, ~100 million tonnes CO₂-e value. Composition: • HFCs: ~95% of the bank • HCFCs: ~3.7% (declining) • Natural refrigerants (HC, CO₂, ammonia): growing rapidly Largest contributors: • Stationary AC and heat pumps: 65% • Mobile AC: 20% • Cold chain (excl. domestic): 13% • Domestic refrigeration: 2%

ARC KEY FIGURES 2024/25



90,996

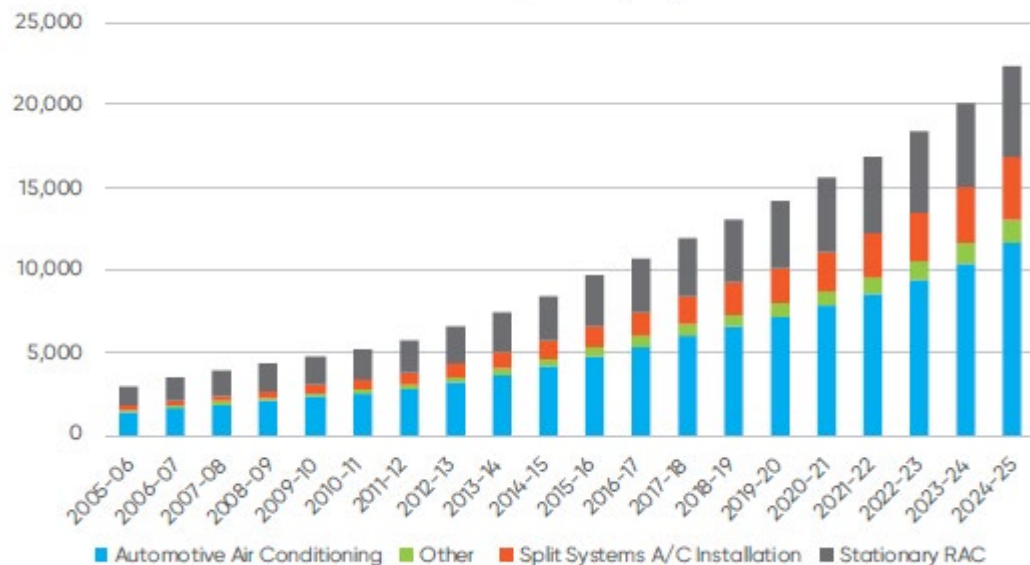
Refrigerant Handling Licences



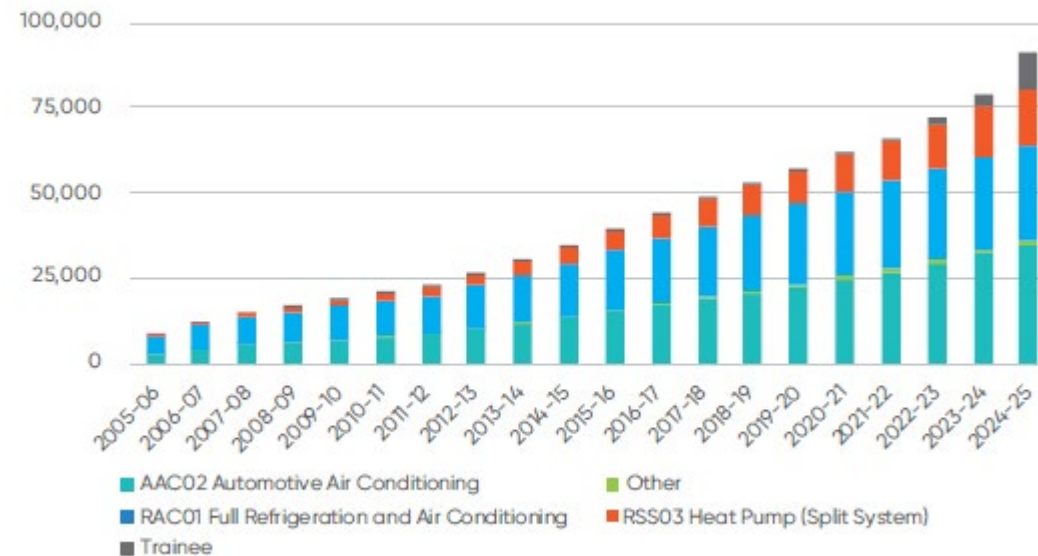
22,357

Refrigerant Trading Authorisations

Current RTAs by industry segment

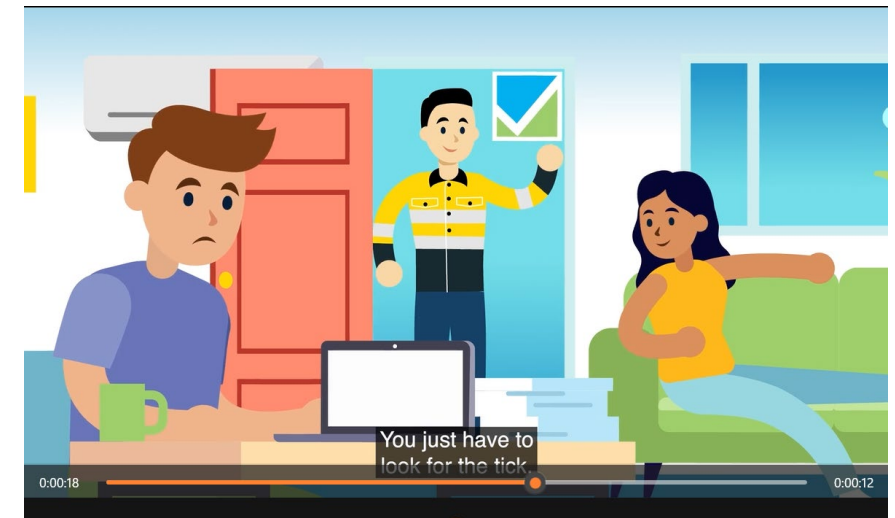


Current RHLs by licence type



ARC RETAIL ENGAGEMENT PROJECT

- The demand for split system air-conditioning units is growing.
- Enhancing the impact of the longstanding **Look for the Tick** campaign
- Partnering with retail channel for better outcomes in consumer awareness of the importance of using licensed installers for split systems
- Addressing a gap in the customer journey



ARC SUMMER CAMPAIGN - LOOK FOR THE TICK



- The summer campaign is a digital marketing initiative that runs from October to March each year. It promotes the message “Look for the Tick” and encourages consumers to choose licensed technicians for their aircon installations and servicing. It also provides free AC guides for home and auto with business search options in local area.
- We have identified a gap in the customer journey for the air-conditioning units that are purchased through retail channels.
- Retailers often offer their customers installation services but there is no clear link with a legal requirement to use a specialised licensed technician.
- ARC would like to partner with retailers for better outcomes in consumer awareness of the importance of using licensed installers for split systems
- Opportunity to enhance the impact of the longstanding Look for the Tick campaign

ARC SUMMER CAMPAIGN TO LOOK FOR THE TICK

	2024/2025	2023/2024	Increase (%)
Website Visits	136,106	83,675	62.66%
Use of Business Search Directory	18,546	16,077	15.36%
Use of Licence Check Facility	12,923	8,145	58.75%
Download of Home Air Con Guide	9,139	8,329	9.73%
Download of Auto Air Con Guides	4,233	2,990	41.57%
Total Guide Downloads	13,372	11,319	18.14%

PROGRAM OVERVIEW AND RETAILER TOOLKIT

Retailer Toolkit Components

Toolkit includes counter cards, flyers, QR codes, social media tiles, and videos for easy promotion at point-of-sale.

Program Benefits for Retailers

Participation enhances brand visibility, increases consumer trust, and supports environmental and legal compliance.

Easy Implementation and Support

Plug-and-play materials minimize staff disruption; centralized support ensures smooth program deployment

STRATEGIC OBJECTIVES AND EXPECTED IMPACT

Increase Awareness and Engagement

The program increases retailer and consumer awareness of ARCtick licensing and drives traffic to an informational website.

Promote Environmental Compliance

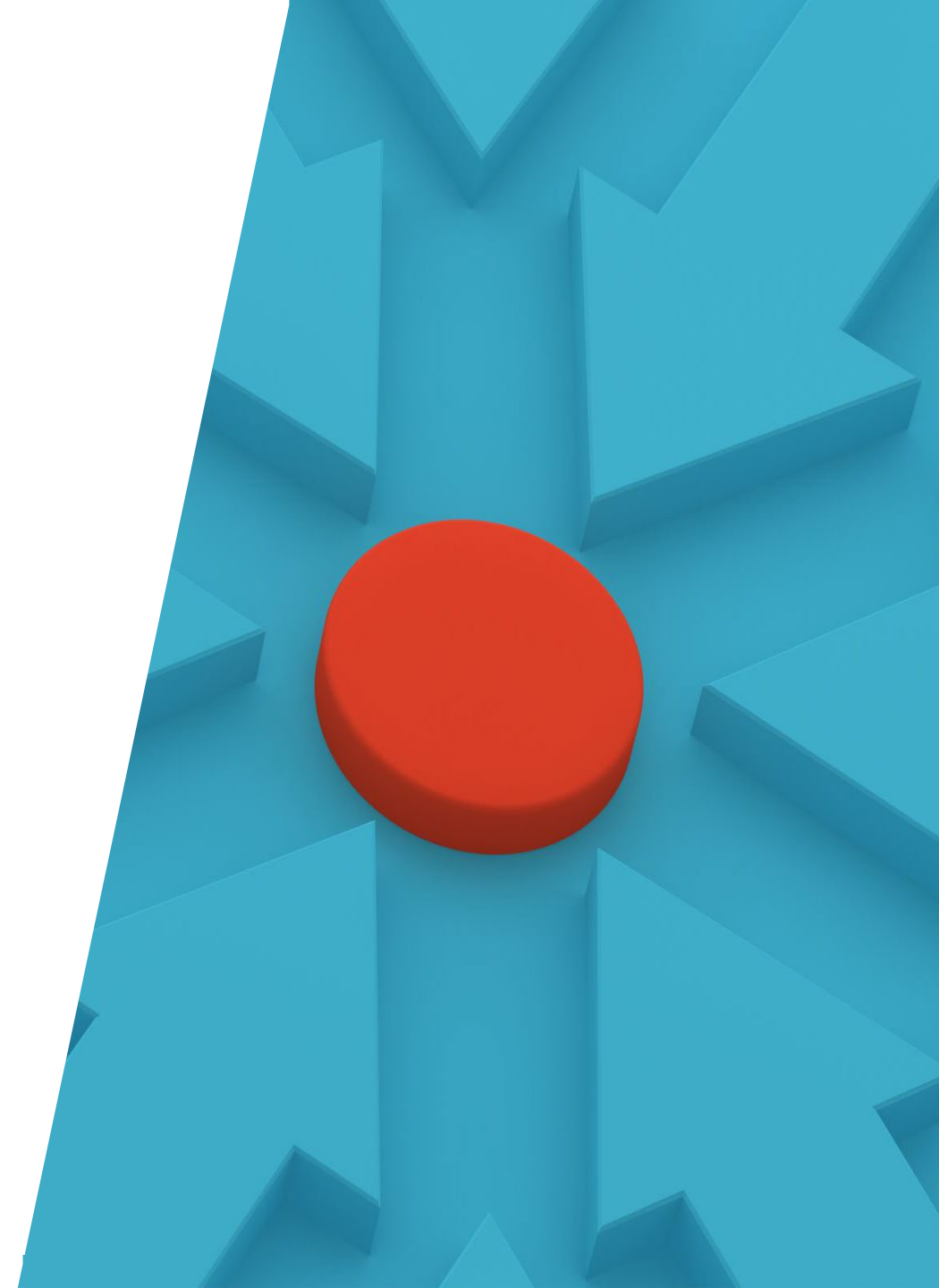
It improves compliance with environmental standards by encouraging use of licensed RAC technicians for installations.

Enhance Industry and Consumer Trust

The program supports industry alignment and builds consumer trust through verified, safer, and efficient installations.

Measure Performance and Accountability

Performance metrics include retailer participation, consumer engagement via QR codes, and mystery shopper evaluations.



APPROACH FOR RETAILER PARTICIPATION

Outbound Retailer Engagement

The outbound strategy targets select retailers with personalised communication and briefing materials for effective participation.

Inbound Retailer Participation

The inbound strategy invites retailers to self-nominate via an online Expression of Interest form that will go live on the lookforthetick.com.au website.

CALL TO ACTION FOR INDUSTRY SUPPORT

Engaging Retail Partners

AREMA members are urged to connect ARC with retail partners to expand the Retail Engagement Program effectively.

Promoting Licensed Installation

Manufacturers can influence retail practices by promoting the importance of licensed installation to ensure quality and compliance.

Mutual Benefits of Collaboration

Collaboration ensures product performance, warranty protection, consumer trust, and supports environmental goals.

Open Feedback and Partnership

ARC encourages feedback and ideas from AREMA members to strengthen the partnership and achieve shared outcomes

THANK YOU

- Questions
- Where to from here

Contact details

Susie O'Neill

soneill@arctick.org

0429 626 170