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Global Secondary Refrigerants Market Size Study & Forecast, by Product (Glycols, Salt Brines, Carbon Dioxide) and End-use, and Regional Forecasts 2025–2035

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Abstracts

The Global Secondary Refrigerants Market is valued at approximately USD 0.81 billion in 2024 and is projected to grow at a healthy compound annual growth rate (CAGR) of 7.50% during the forecast period from 2025 to 2035. Secondary refrigerants—substances used to transfer heat from one location to another after being cooled by a primary refrigerant—are becoming increasingly vital in the refrigeration and air conditioning industry due to the global movement toward sustainable and energy-efficient systems. Their ability to reduce direct greenhouse gas emissions from refrigerants and mitigate energy consumption has made them indispensable across various commercial and industrial environments. As the world navigates stricter climate policies and cooling technology evolves, secondary refrigerants are emerging as a strategic enabler of both environmental compliance and operational efficiency.

Heightened regulatory pressure on hydrofluorocarbon (HFC) use, particularly across Europe and North America, has spurred a wave of investment in low-GWP (Global Warming Potential) refrigerants and systems that rely more heavily on secondary loops. In this context, glycol-based secondary refrigerants—especially propylene and ethylene glycols—are seeing increased application in commercial refrigeration and district cooling systems. Additionally, carbon dioxide, with its ultra-low GWP profile, is gaining traction in cascade refrigeration systems. The shift toward sustainable supermarket refrigeration, industrial chillers, and CO? transcritical systems is pushing manufacturers to continuously enhance the thermal conductivity and safety profile of secondary fluids. Moreover, the surging demand for cold chain logistics, largely driven by pharmaceuticals and perishable food segments, is reinforcing the relevance of these

refrigerants in maintaining precise thermal conditions.

Regionally, North America commands a substantial share of the secondary refrigerants market, underpinned by its advanced HVAC infrastructure and proactive environmental policy framework. The region's robust demand for energy-efficient refrigeration systems in commercial retail, data centers, and cold storage applications is accelerating the transition toward secondary loop systems. Europe, bolstered by the F-Gas regulation and high environmental consciousness, continues to lead innovation in secondary refrigerant adoption, with several nations enforcing aggressive decarbonization targets. Meanwhile, Asia Pacific is poised for the fastest growth over the forecast period. Emerging economies such as China and India are expanding their industrial base and cold chain networks, necessitating reliable and scalable cooling solutions. Rapid urbanization, infrastructure development, and growing food exports are compelling end-users to shift toward safer and more sustainable refrigerant systems in the region.

Major market player included in this report are:

BASF SE

Trane Technologies

Arkema S.A.

The Dow Chemical Company

Clariant AG

Chemours Company

Dynalene, Inc.

Linde Group

Johnson Controls

Hydratech Limited

Temprite Company

SINTEF Energy Research

Axima Refrigeration

Engie Refrigeration GmbH

Mayekawa Mfg. Co., Ltd.

Global Secondary Refrigerants Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players.

The detailed segments and sub-segments of the market are explained below:

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By Product:

- Glycols
- Salt Brines
- Carbon Dioxide

By End-use:

- Commercial Refrigeration
- Industrial Refrigeration
- Heat Pumps
- Air Conditioning

By Region:

North America

- U.S.
- Canada

Europe

- UK
- Germany
- France
- Spain

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Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

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Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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