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Global Environmentally Friendly Refrigerants for Automobiles Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Environmentally Friendly Refrigerants for Automobiles market size is expected to reach $ 3297 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

In 2025, the global production of environmentally friendly refrigerants for automobiles reached approximately 61,300 tons, with an average global market price of around USUS$30,000 per ton. In the same year, the global total production capacity of environmentally friendly refrigerants for automobiles reached 76,625 tons. The industry average gross profit margin of this product reached 32%.

Environmentally friendly refrigerants for automobiles refer to a new generation of refrigerants used in automotive air conditioning systems to facilitate the refrigeration cycle and lower cabin temperatures while complying with global environmental regulations. These refrigerants primarily include low-Global Warming Potential (GWP) HFO-based refrigerants (such as R1234yf), natural refrigerants (such as CO?/R744), low-GWP refrigerant blends, and other novel eco-friendly alternatives. Compared to the traditional high-GWP refrigerant R134a, these eco-friendly alternatives offer a reduced greenhouse effect and superior environmental compatibility, aligning with policy trends such as the EU's Mobile Air Conditioning (MAC) Directive, the US EPA's SNAP regulations, and China's environmental upgrade requirements for the automotive industry. Currently, R1234yf has become the mainstream replacement for passenger vehicle air conditioning systems globally, while R744 (CO?) is primarily utilized in new energy vehicles (NEVs), high-end models, and future heat pump air conditioning systems.

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The industry value chain for eco-friendly automotive refrigerants comprises three main segments: upstream raw material supply, midstream refrigerant production and auxiliary equipment manufacturing, and downstream application in automotive air conditioning systems. The upstream segment primarily involves basic fluorochemical raw materials?such as hydrogen fluoride (HF), chlorides, tetrafluoroethylene (TFE), hexafluoropropylene (HFP), catalysts, and CO? sources?with supply capacity influenced by fluorspar resources, energy costs, and environmental policies. The midstream segment consists mainly of manufacturers producing eco-friendly refrigerants (such as R1234yf, R134a alternatives, and R744) through processes like polymerization, fluorination, distillation, and blending; it also encompasses the manufacturing of refrigerant recovery, charging, and testing equipment. The downstream segment focuses on applications in automotive air conditioning compressors, thermal management systems, and vehicle manufacturing, covering traditional internal combustion engine vehicles, new energy vehicles, hybrid vehicles, commercial vehicles, and construction machinery. As the complexity of thermal management systems in new energy vehicles increases, automotive refrigerants are evolving from simple cooling media into critical materials for vehicle-wide thermal management.

The industry for eco-friendly automotive refrigerants holds significant growth potential, driven primarily by the tightening of global automotive environmental regulations, the rapid expansion of the new energy vehicle market, and policies aimed at carbon emission reduction. The EU mandate requiring automotive air conditioning systems to use refrigerants with a Global Warming Potential (GWP) of less than 150 has accelerated the replacement of R134a with R1234yf; meanwhile, markets such as the US, China, and Japan continue to promote the adoption of low-carbon refrigeration technologies. The rise of new energy vehicles (NEVs)?driven by the need for effective battery thermal management and cabin comfort?has further boosted demand for high-performance, eco-friendly refrigerants. Future industry development will focus on novel refrigerants characterized by low GWP, high efficiency, and enhanced safety, such as R1234yf, R744, and next-generation, low-cost HFO blends. While the market for eco-friendly automotive refrigerants is projected to grow rapidly alongside the expanding global vehicle population and rising NEV penetration, the industry also faces challenges, including high HFO production costs, patent barriers, and increasingly stringent environmental regulations within the fluorochemical sector.

This report studies the global Environmentally Friendly Refrigerants for Automobiles production, demand, key manufacturers, and key regions.

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This report is a detailed and comprehensive analysis of the world market for Environmentally Friendly Refrigerants for Automobiles and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Environmentally Friendly Refrigerants for Automobiles that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Environmentally Friendly Refrigerants for Automobiles total production and demand, 2021-2032, (Tons)
Global Environmentally Friendly Refrigerants for Automobiles total production value, 2021-2032, (USD Million)
Global Environmentally Friendly Refrigerants for Automobiles production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Environmentally Friendly Refrigerants for Automobiles consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Environmentally Friendly Refrigerants for Automobiles domestic production, consumption, key domestic manufacturers and share
Global Environmentally Friendly Refrigerants for Automobiles production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Environmentally Friendly Refrigerants for Automobiles production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Environmentally Friendly Refrigerants for Automobiles production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Environmentally Friendly Refrigerants for Automobiles market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Daikin, Chemours Company, Honeywell, Arkema, Linde Gas, Air Products, Air Liquide, Messer, Juhua Group, Showa Denko, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Environmentally Friendly Refrigerants for Automobiles

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market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Environmentally Friendly Refrigerants for Automobiles Market, By Region:

- United States
- China
- Europe
- Japan
- South Korea
- ASEAN
- India
- Rest of World

Global Environmentally Friendly Refrigerants for Automobiles Market, Segmentation by Type:

- R-1234yf
- R-744
- R-474A
- Others

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Global Environmentally Friendly Refrigerants for Automobiles Market, Segmentation by Environmental Performance:

- Ultra-low GWP Natural Refrigerants
- Ultra-low GWP HFOs
- Low-to-medium GWP Refrigerants

Global Environmentally Friendly Refrigerants for Automobiles Market, Segmentation by Safety Class:

- Class A1
- Class A2
- Class A3

Global Environmentally Friendly Refrigerants for Automobiles Market, Segmentation by Application:

- Commercial Vehicles
- Passenger Vehicles

Companies Profiled:

- Daikin
- Chemours Company
- Honeywell
- Arkema

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Linde Gas

Air Products

Air Liquide

Messer

Juhua Group

Showa Denko

Sinochemlt

Koura Global

Dongyue Group

Zhejiang Sanmei Chemical

Yonghe Refrigerant

Key Questions Answered:
1. How big is the global Environmentally Friendly Refrigerants for Automobiles market?
2. What is the demand of the global Environmentally Friendly Refrigerants for Automobiles market?
3. What is the year over year growth of the global Environmentally Friendly Refrigerants for Automobiles market?
4. What is the production and production value of the global Environmentally Friendly Refrigerants for Automobiles market?
5. Who are the key producers in the global Environmentally Friendly Refrigerants for Automobiles market?
6. What are the growth factors driving the market demand?

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