

Global Low Global Warming Potential Refrigerants Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

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Abstracts

According to our (Global Info Research) latest study, the global Low Global Warming Potential Refrigerants market size was valued at US\$ 2627 million in 2024 and is forecast to a readjusted size of USD 3834 million by 2031 with a CAGR of 5.6% during review period.

The market for Low Global Warming Potential (GWP) refrigerants is undergoing a significant transformation driven by stringent regulatory frameworks, environmental concerns, and technological advancements. As global awareness of climate change intensifies, regulations such as the Kigali Amendment to the Montreal Protocol and the European Union's F-Gas Regulation are mandating reductions in the use of high-GWP refrigerants like HFCs, propelling the shift towards alternatives with lower GWP. This regulatory pressure is fostering a rapid adoption of low-GWP refrigerants across various sectors including commercial, industrial, and residential refrigeration. Among the prominent low-GWP alternatives are hydrofluoroolefins (HFOs), which, such as HFO-1234yf, offer significantly reduced GWP compared to traditional HFCs, and are increasingly used in automotive air conditioning and other applications. HFC replacements like R32 (Difluoromethane) and R-152a are also gaining prominence. R32, with a GWP of around 675, is a direct and efficient replacement for higher-GWP refrigerants like R410A in air conditioning systems, while R-152a, with a GWP of 138, is used in specific applications where lower environmental impact is crucial, despite its flammability. Additionally, natural refrigerants like carbon dioxide (CO₂), ammonia (R-717), and hydrocarbons (e.g., propane R-290) are gaining traction due to their negligible or zero GWP and high efficiency, making them suitable for diverse applications from commercial refrigeration to industrial processes. Technological advancements are also playing a crucial role in facilitating this transition, with

innovations improving the efficiency, safety, and applicability of low-GWP refrigerants. For example, new system designs and refrigerant blends are enhancing the performance of low-GWP options and addressing challenges such as high pressures or flammability. The market is experiencing robust growth, driven by both regulatory compliance and the pursuit of sustainability. This growth is further supported by increasing investment in research and development, aimed at optimizing the performance and expanding the applications of low-GWP refrigerants. As industries and governments align with more ambitious climate goals, the trend towards low-GWP refrigerants is expected to continue accelerating, reshaping the refrigeration and air conditioning landscape with a focus on reducing environmental impact and enhancing energy efficiency.

Natural refrigerants were the basis of the earliest refrigeration systems. However, as technology developed, they were replaced by artificial refrigerants. These synthetic refrigerants have properties suitable for different HVAC and refrigeration applications and overcome issues such as flammability, toxicity and corrosiveness. Synthetic refrigerants include chlorofluorocarbons (CFCs), hydrochlorofluorocarbons (HCFCs), hydrofluorocarbons (HFCs) and hydrofluoroolefins (HFOs).

However, it was discovered that the benefits of synthetic refrigerants come at a cost. Chlorofluorocarbons (CFCs) and hydrochlorofluorocarbons (HCFCs) have high ozone depletion potential (ODP) values and cause serious damage to the ozone layer. Their replacement, HFCs, have high global warming potential (GWP) values and contribute to global warming and climate change.

Under the Montreal Protocol (and several subsequent amendments), several countries agreed to phase out CFCs and HCFCs and phase down HFCs. In the process of survival of the fittest, we are returning to natural refrigerants in full force. Natural refrigerants such as carbon dioxide (CO₂), propane (C₃H₈), ammonia (NH₃) and brine have no or very low global warming potential and ozone depletion potential, providing options for proven, future-proof, environmentally friendly refrigerants.

Global and regional regulations are the main drivers of the adoption of low GWP refrigerants. Agreements such as the Kigali Amendment to the Montreal Protocol, which require a global phase-down of HFCs, are driving countries to reduce their reliance on high GWP refrigerants. In the EU, the F-Gas Regulation strictly restricts the use of high GWP refrigerants, further accelerating this transition. Similar initiatives in the United States, Japan and other regions are driving the shift to more sustainable refrigerant solutions.

As concerns about climate change grow, industries are under increasing pressure to minimize their carbon footprint. Traditional HFC refrigerants contribute significantly to global warming due to their high GWP values. Switching to low-GWP alternatives such as HFOs, natural refrigerants (ammonia, CO₂, hydrocarbons), and low-GWP HFCs (R32) can enable companies to significantly reduce greenhouse gas emissions.

Many low-GWP refrigerants, especially natural refrigerants and some HFOs, are highly energy efficient, which can save costs in the long run. This is particularly important for energy-intensive industries such as refrigeration and air conditioning. The ability to combine environmental benefits with energy savings is a strong incentive for companies to make the switch.

One of the main challenges of adopting low-GWP refrigerants is the need to retrofit or replace existing refrigeration systems. Many low-GWP refrigerants, such as CO₂ (R-744) or ammonia (R-717), require different system designs due to higher operating pressures or safety issues such as toxicity and flammability. This can result in significant upfront costs for companies, especially in industries with large refrigeration infrastructure.

Some low-GWP refrigerants, especially natural refrigerants, present safety challenges. Ammonia (R-717) is toxic, CO₂ (R-744) requires high-pressure systems, and hydrocarbons such as propane (R-290) and isobutane (R-600a) are flammable. The need to adhere to strict safety standards for handling, storage, and system design adds complexity and cost to the adoption of these refrigerants.

While low-GWP refrigerants generally offer long-term energy savings, the initial cost of adopting these technologies, either through new systems or retrofits, can be high. This financial barrier, especially for small and medium-sized enterprises, has slowed the widespread adoption of low-GWP refrigerants.

The use of natural refrigerants such as CO₂, ammonia, and hydrocarbons is increasing due to their minimal environmental impact and regulatory compliance. For example, CO₂ (R-744) is used in commercial refrigeration, especially in supermarkets, while ammonia (R-717) is widely used in industrial refrigeration. These refrigerants are sustainable in the long term and have zero or near-zero GWP.

Hydrofluoroolefins (HFOs) are increasingly being developed as replacements for high-GWP HFCs. HFOs, such as HFO-1234yf, are widely used in the automotive and HVAC

industries due to their ultra-low GWP and similar performance characteristics to HFCs. In addition, HFC/HFO blends (e.g., R454B, R452A) are used to balance system compatibility and lower GWP values, providing transition solutions for industries that are not yet ready to fully switch to natural refrigerants.

The refrigeration and air conditioning industry is rapidly innovating system designs to accommodate low-GWP refrigerants. For example, new technologies are being developed to safely handle high pressures of CO₂ (R-744) or reduce the risk of flammable hydrocarbons. These advances help improve system performance and safety, making low-GWP refrigerants more suitable for a wider range of applications.

The combination of low-GWP refrigerants and energy-efficient system designs is becoming an important trend. Refrigerants that not only have a lower environmental impact but are also more energy-efficient are in high demand. This is particularly important for industries where refrigeration systems operate continuously, such as food processing, supermarkets, and cold storage facilities.

This report is a detailed and comprehensive analysis for global Low Global Warming Potential Refrigerants market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Low Global Warming Potential Refrigerants market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2020-2031

Global Low Global Warming Potential Refrigerants market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2020-2031

Global Low Global Warming Potential Refrigerants market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2020-2031

Global Low Global Warming Potential Refrigerants market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2020-2025

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Low Global Warming Potential Refrigerants

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Low Global Warming Potential Refrigerants market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments.

Key companies covered as a part of this study include Honeywell, Chemours, Zhejiang Juhua, Arkema, Zhejiang Yonghe, Linde Group, Daikin, Puyang Zhongwei Fine Chemical Co, Dongyue Group, Zhejiang Sanmei Chemical, etc.

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

Market Segmentation

Low Global Warming Potential Refrigerants market is split by Type and by Application. For the period 2020-2031, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

HFC Replacements

Natural Refrigerants

HFO Refrigerants

Market segment by Application

Household Air Conditioning and Refrigeration

Commercial and Industrial Refrigeration

Commercial and Industrial Air Conditioning

Transport Air Conditioning

Major players covered

Honeywell

Chemours

Zhejiang Juhua

Arkema

Zhejiang Yonghe

Linde Group

Daikin

Puyang Zhongwei Fine Chemical Co

Dongyue Group

Zhejiang Sanmei Chemical

Zibo Feiyuan Chemical

Shandong Yue'an New Material Co

Shandong Hua'an

Aeropres Corporation

Messer Group

Tazzetti

Zhejiang Huanxin Fluoromaterial Co

Evonik

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Low Global Warming Potential Refrigerants product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Low Global Warming Potential Refrigerants, with price, sales quantity, revenue, and global market share of Low Global Warming Potential Refrigerants from 2020 to 2025.

Chapter 3, the Low Global Warming Potential Refrigerants competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Low Global Warming Potential Refrigerants breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by

regions, from 2020 to 2031.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2020 to 2031.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2020 to 2025. and Low Global Warming Potential Refrigerants market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Low Global Warming Potential Refrigerants.

Chapter 14 and 15, to describe Low Global Warming Potential Refrigerants sales channel, distributors, customers, research findings and conclusion.

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