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Global Low-GWP HFC Refrigerants Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Low-GWP HFC Refrigerants market size is expected to reach $ 5929 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

In 2025, the global production of low-GWP HFC refrigerants reached approximately 670,000 tons, with an average global market price of around US$6/kg. In the same year, the global total production capacity of low-GWP HFC refrigerants reached 840,000 tons. The industry average gross profit margin of this product reached 35%.Low-GWP HFC refrigerants are a class of transitional or optimized refrigerants derived from traditional HFC systems through single-component optimization or blending; they possess a Global Warming Potential (GWP) significantly lower than that of mainstream high-GWP HFCs. Typical examples include HFC-32 (R32) and various HFC/HFO blends. While maintaining high cooling efficiency, favorable thermodynamic properties, and equipment compatibility, these refrigerants mitigate greenhouse gas impacts, thereby meeting the industry's need to phase down high-GWP refrigerants in accordance with the Kigali Amendment. They are widely used in air conditioning, heat pumps, and commercial refrigeration systems (medium- and low-temperature).

The upstream segment of the low-GWP HFC refrigerant value chain primarily comprises basic fluorochemical raw materials and intermediates. The midstream consists of refrigerant synthesis and blending enterprises responsible for producing R32, modified R134a systems, and HFC/HFO blends, as well as handling purification, packaging, and formulation optimization. The downstream sector encompasses the manufacturing of air conditioners and heat pumps, cold chain logistics equipment, industrial refrigeration systems, and the aftermarket for servicing and recharging. Additionally, equipment manufacturers (such as compressor and heat exchanger producers) collaborate with

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refrigerant manufacturers to drive the industry-wide transition from high-GWP to low-GWP technologies.

Driven by the ongoing implementation of the Kigali Amendment to the Montreal Protocol, the global refrigeration industry is undergoing a structural shift from high-GWP HFCs toward low-GWP alternatives, and ultimately to HFOs or natural refrigerants. As a ?transitional solution,? low-GWP HFC refrigerants offer a favorable balance between compatibility with existing equipment, retrofit costs, and safety, ensuring continued strong demand in the replacement market for installed systems. Future growth will be fueled by upgrades in air conditioner energy efficiency, increased heat pump adoption, expanding refrigeration demand in developing countries, and the replacement of legacy R22 and R404A systems. However, in the long term, their market share is expected to be gradually eroded by HFOs and natural refrigerants, following a typical trajectory of ?medium-term growth followed by long-term displacement.?

This report studies the global Low-GWP HFC Refrigerants production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Low-GWP HFC Refrigerants 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 Low-GWP HFC Refrigerants that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Low-GWP HFC Refrigerants total production and demand, 2021-2032, (Tons)
Global Low-GWP HFC Refrigerants total production value, 2021-2032, (USD Million)
Global Low-GWP HFC Refrigerants production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Low-GWP HFC Refrigerants consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Low-GWP HFC Refrigerants domestic production, consumption, key domestic manufacturers and share
Global Low-GWP HFC Refrigerants production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Low-GWP HFC Refrigerants production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Low-GWP HFC Refrigerants production by Application, production, value,

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CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Low-GWP HFC Refrigerants 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, Honeywell, Chemours, Arkema, Mitsubishi, Orbia, Zhejiang Juhua, Dongyue Group, Sanmei, Gujarat Fluorochemicals, 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 Low-GWP HFC Refrigerants market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/kg) 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 Low-GWP HFC Refrigerants Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Global Low-GWP HFC Refrigerants Market, Segmentation by Type:

R32

R1234yf

R1233zd

Others

Global Low-GWP HFC Refrigerants Market, Segmentation by GWP Level:

Medium-to-low GWP HFC

Lower GWP HFC

Global Low-GWP HFC Refrigerants Market, Segmentation by Temperature Range:

Medium Temperature

Low Temperature

Ultra-low Temperature

Global Low-GWP HFC Refrigerants Market, Segmentation by Application:

Home Air Conditioners

Commercial Air Conditioners

Car Air Conditioners

Others

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Companies Profiled:

Daikin

Honeywell

Chemours

Arkema

Mitsubishi

Orbia

Zhejiang Juhua

Dongyue Group

Sanmei

Gujarat Fluorochemicals

SRF Ltd

JCI-YORK

Carrier

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

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