

Global R-290a Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GDB1DEF81F64EN.html>

Date: June 2026

Pages: 73

Price: US\$ 3,480.00 (Single User License)

ID: GDB1DEF81F64EN

Abstracts

According to our (Global Info Research) latest study, the global R-290a market size was valued at US\$ 350 million in 2025 and is forecast to a readjusted size of US\$ 522 million by 2032 with a CAGR of 6.6% during review period.

R-290 (or R-290a) is propane used as a high-efficiency natural refrigerant in heat pumps, air conditioners, and refrigeration systems. It has a very low Global Warming Potential (GWP) of 3 and zero Ozone Depletion Potential (ODP), making it an eco-friendly alternative to synthetic refrigerants like R410A and R32. In 2025, global R-290a production reached approximately 162 K MT.

The core market drivers for R-290a (usually R-290, propane) are primarily driven by the low GWP replacement trend and environmental regulations. As a natural refrigerant, R-290 has a very low global warming potential and is benefiting from restrictions imposed by various countries on high GWP HFC refrigerants, HFC phase-down policies, and the trend of transitioning to natural refrigerants in commercial refrigeration and some air conditioning sectors. UNEP technical assessments and EPA's SNAP rules both show that R-290 is increasingly being included as an acceptable alternative, especially in commercial refrigeration, food retail equipment, and some small air conditioning and heat pump applications. This policy-driven approach makes R-290 not just an 'environmentally friendly alternative,' but a practical choice for more and more equipment manufacturers to meet regulatory compliance and upgrade their products.

The second important driver is the growth in energy efficiency performance and end-use equipment demand. Public research and industry data generally indicate that R-290 possesses good thermodynamic properties and energy efficiency, making it highly attractive in refrigerators, freezers, commercial display cases, and some air

conditioning/heat pump systems. With the continued growth in global refrigeration and air conditioning demand, manufacturers are increasingly favoring refrigerant solutions that improve energy efficiency while reducing the impact of direct emissions. Market research summaries also attribute R-290's growth to its expanding applications in HVAC and refrigeration. However, its primary constraint remains flammability; therefore, safety standards, charge limits, installation specifications, and technician training will continue to influence its penetration rate.

This report is a detailed and comprehensive analysis for global R-290a 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 R-290a market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global R-290a market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global R-290a market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global R-290a market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

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 R-290a

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 R-290a 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 Linde, Air Liquide, Heze Sirloong Chemical, Harp International, Tazzetti, etc.

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

Market Segmentation

R-290a market is split by Type and by Application. For the period 2021-2032, 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

Content ?99.5%

Content ?995%

Market segment by Package

Small Cans

Steel Cylinders

Market segment by Channel

Direct Selling

Distribution

Market segment by Application

Residential Refrigeration

Commercial Refrigeration

Major players covered

Linde

Air Liquide

Heze Sirloong Chemical

Harp International

Tazzetti

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 R-290a product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of R-290a, with price, sales quantity, revenue, and global market share of R-290a from 2021 to 2026.

Chapter 3, the R-290a competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the R-290a breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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 2021 to 2032.

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 2021 to 2026. and R-290a market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

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 R-290a.

Chapter 14 and 15, to describe R-290a sales channel, distributors, customers, research findings and conclusion.

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