

Global R-290a Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global R-290a market size is expected to reach \$ 522 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

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 studies the global R-290a production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for R-290a 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 R-290a that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global R-290a total production and demand, 2021-2032, (Kilotons)

Global R-290a total production value, 2021-2032, (USD Million)

Global R-290a production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global R-290a consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: R-290a domestic production, consumption, key domestic manufacturers and share

Global R-290a production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global R-290a production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global R-290a production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global R-290a 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World R-290a market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 R-290a Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global R-290a Market, Segmentation by Type:

Content ?99.5%

Content ?995%

Global R-290a Market, Segmentation by Package:

Small Cans

Steel Cylinders

Global R-290a Market, Segmentation by Channel:

Direct Selling

Distribution

Global R-290a Market, Segmentation by Application:

Residential Refrigeration

Commercial Refrigeration

Companies Profiled:

Linde

Air Liquide

Heze Sirloong Chemical

Harp International

Tazzetti

Key Questions Answered:

1. How big is the global R-290a market?
2. What is the demand of the global R-290a market?
3. What is the year over year growth of the global R-290a market?
4. What is the production and production value of the global R-290a market?
5. Who are the key producers in the global R-290a market?
6. What are the growth factors driving the market demand?

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