

Global R290 Refrigerator Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global R290 Refrigerator market size was valued at US\$ 15450 million in 2025 and is forecast to a readjusted size of US\$ 24313 million by 2032 with a CAGR of 6.6% during review period.

In 2025, the global production of R290 refrigerator reached approximately 12.51 million units, with an average global market price of around US\$800-\$1500 per unit. In the same year, the global total production capacity of R290 refrigerator reached 15.64 million units. The industry average gross profit margin of this product reached 30%. R290 refrigerators are compression refrigeration devices that use propane (R290) as the refrigerant. They achieve refrigeration through an evaporation-compression-condensation-throttling cycle. Their core characteristic is the use of a natural hydrocarbon refrigerant instead of traditional HFC refrigerants (such as R134a and R404A). They have extremely low global warming potential (GWP=3) and zero ozone depletion potential (ODP=0), resulting in high energy efficiency, good refrigeration efficiency, and typically small charge amounts. Therefore, they are mainly used in commercial freezers, display cases, beverage coolers, light commercial refrigerators, and some small household refrigerators. Because R290 is a Group A3 flammable refrigerant, the equipment design must meet safety standards and strictly control the charge amount. Therefore, R290 refrigerators typically employ sealed compressors, small charge systems, and explosion-proof electrical designs to ensure safe operation.

The R290 refrigerator industry chain can be divided into three levels: upstream raw materials and core components, midstream complete unit manufacturing, and downstream application scenarios. The upstream mainly includes propane refrigerant production, compressor manufacturing, copper pipes/heat exchangers, electronic

controllers, insulation materials, sheet metal and plastic parts, etc., with R290 refrigerant requiring a purity of 99.5%. The midstream consists of refrigerator manufacturers and OEM/ODM companies, including commercial refrigeration equipment manufacturers, freezer manufacturers, and home appliance companies, who design, assemble, and obtain safety certifications to create end-user equipment. The downstream is mainly used in catering retail, supermarket cold chain, beverage display, convenience stores, pharmaceutical refrigeration, and some household refrigerator markets. With the advancement of environmental regulations, high-GWP refrigerants are gradually being phased out, leading to increased demand for natural refrigerant systems, thus forming a complete ecosystem from chemical raw materials to refrigeration components, complete units, and cold chain applications.

The core drivers of growth in the R290 refrigerator industry come from environmental policies, the demand for improved energy efficiency, and the expansion of cold chain infrastructure. Globally, many regions are gradually restricting the use of high-GWP refrigerants through F-Gas regulations, making natural refrigerants one of the alternatives. Meanwhile, R290 systems, with their higher energy efficiency and lower carbon emissions, are rapidly gaining popularity in the commercial refrigeration sector. With increasing demands from retail, catering, cold chain logistics, and food safety sectors, the market for commercial freezers and display cases continues to expand. In the future, with upgraded safety standards, relaxed charge volume restrictions, and technological maturity, R290 is expected to become one of the major mainstream refrigerants for small commercial refrigeration equipment.

This report is a detailed and comprehensive analysis for global R290 Refrigerator market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Structure 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 R290 Refrigerator market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global R290 Refrigerator market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices

(US\$/Unit), 2021-2032

Global R290 Refrigerator market size and forecasts, by Product Structure and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global R290 Refrigerator market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 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 R290 Refrigerator

- 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 R290 Refrigerator 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 Hoshizaki, Panasonic, Haier, Liebherr, AHT Cooling Systems, Epta, Carrier Commercial Refrigeration, Hussmann, Everest, Blue Star, etc.

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

Market Segmentation

R290 Refrigerator market is split by Product Structure and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Structure, 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 Product Structure

Upright Refrigerators

Horizontal Freezers

Display Cases

Combined Refrigeration Systems

Market segment by Technology Types

Single Compressor Systems

Multi-Evaporator Systems

Inverter Compressor Refrigerators

Smart IoT Freezers

Market segment by Compressor Structure

Integrated R290 System

Split R290 System

Market segment by Application

Home Use

Commercial Use

Major players covered

Hoshizaki

Panasonic

Haier

Liebherr

AHT Cooling Systems

Epta

Carrier Commercial Refrigeration

Hussmann

Everest

Blue Star

ARNEG

ISA S.p.A.

Gram Commercial

Hiron

AUCMA

Zhejiang Xingxing Cold Chain Integration Co., Ltd.

Fujimak Corporation

Turbo Air

Ali Group

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 R290 Refrigerator product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of R290 Refrigerator, with price, sales quantity, revenue, and global market share of R290 Refrigerator from 2021 to 2026.

Chapter 3, the R290 Refrigerator competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the R290 Refrigerator 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 Product Structure and by Application, with sales market share and growth rate by Product Structure, 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 R290 Refrigerator market forecast, by regions, by Product Structure, 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 R290

Refrigerator.

Chapter 14 and 15, to describe R290 Refrigerator sales channel, distributors, customers, research findings and conclusion.

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