

# Global R32 Refrigerant Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global R32 Refrigerant market size is expected to reach \$ 2396 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

R32 (Difluoromethane, CH<sub>2</sub>F<sub>2</sub>) is a hydrofluorocarbon (HFC) refrigerant widely used in air conditioning and heat pump systems due to its high energy efficiency, low global warming potential compared to R410A, and favorable thermodynamic properties, making it a key transitional refrigerant in the global shift toward lower-GWP cooling solutions.

The R32 refrigerant industry chain begins upstream with fluorochemical raw material suppliers including hydrogen fluoride, chloroform, and fluorinated intermediates derived from fluorspar mining and chemical processing, continues midstream with refrigerant manufacturers that synthesize, purify, and package R32 through fluorination and separation processes while ensuring compliance with environmental and safety standards, and extends downstream to HVAC and refrigeration equipment manufacturers who incorporate R32 into air conditioning systems, heat pumps, and cooling devices sold to residential, commercial, and industrial end users, with installation, maintenance, and aftermarket service providers supporting lifecycle performance and regulatory compliance across global cooling markets.

Ongoing and planned projects in the R32 refrigerant market include expansion of fluorochemical production capacities in China, India, and Southeast Asia to meet growing HVAC demand, construction of new low-GWP refrigerant manufacturing plants aligned with global environmental regulations, retrofitting of existing HCFC-22 facilities to R32-compatible production lines, investment in integrated fluorochemical industrial parks combining upstream fluorspar processing and downstream refrigerant packaging,

and development of advanced emission control and recycling systems, alongside collaborations between chemical companies and HVAC manufacturers to ensure supply stability, improve energy efficiency standards, and support the global transition toward environmentally friendly refrigerant technologies in residential and commercial cooling systems.

2025 Global Market sales Volume: 542 K Tons, Average Global Market Price: USD 2,782/Ton, Market Average Gross Profit Margin: 35%.

The R32 refrigerant market has grown rapidly as global HVAC industries transition toward lower global warming potential (GWP) refrigerants under environmental regulations such as the Kigali Amendment. R32 has become a preferred replacement for R410A in many residential and light commercial air conditioning systems due to its higher energy efficiency, lower GWP, and favorable thermodynamic performance. Its adoption is strongly supported by equipment manufacturers seeking to balance regulatory compliance with system efficiency and cost-effectiveness.

Regionally, Asia-Pacific dominates both production and consumption, led by China, India, and Southeast Asia, where rapid urbanization and strong demand for air conditioning drive large-scale adoption. China is also a major global production hub for fluorochemicals, giving it a significant supply chain advantage. North America and Europe are mature markets with strong regulatory frameworks pushing refrigerant transitions, while adoption in Europe is influenced by strict F-gas regulations encouraging low-GWP alternatives.

Market opportunities are primarily driven by the global expansion of cooling demand, particularly in emerging economies, along with the replacement cycle from high-GWP refrigerants to more environmentally friendly alternatives. Technological improvements in HVAC efficiency and the increasing penetration of heat pumps in heating applications are further expanding demand for R32. Additionally, integration with next-generation refrigerant blends and hybrid systems may create new growth pathways.

However, the market faces risks including regulatory uncertainty as future environmental policies may further restrict HFC usage, potentially accelerating the shift toward natural refrigerants such as CO<sub>2</sub> or propane. Safety considerations, particularly R32's mildly flammable classification, also require system redesigns and compliance measures, increasing costs for manufacturers and installers. Price volatility in upstream fluorochemical raw materials and geopolitical dependencies in fluorospar supply chains further impact market stability.

Key trends include the phase-down of high-GWP refrigerants, increasing electrification of heating through heat pumps, and growing adoption of energy-efficient HVAC systems in both residential and commercial sectors. There is also a strong push toward refrigerant recycling and recovery technologies to reduce environmental impact. Competitively, the market is moderately consolidated, with major chemical producers dominating supply, while HVAC manufacturers influence demand through system design choices. Competition is increasingly driven by regulatory compliance capability, production scale, cost efficiency, and long-term supply agreements rather than pure product differentiation.

This report studies the global R32 Refrigerant production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for R32 Refrigerant 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 R32 Refrigerant that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global R32 Refrigerant total production and demand, 2021-2032, (Kilotons)

Global R32 Refrigerant total production value, 2021-2032, (USD Million)

Global R32 Refrigerant production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global R32 Refrigerant consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: R32 Refrigerant domestic production, consumption, key domestic manufacturers and share

Global R32 Refrigerant production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global R32 Refrigerant production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global R32 Refrigerant production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global R32 Refrigerant 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 Zhejiang Juhua, Sanmei Chemical, Daikin, Honeywell, Dongyue Group, Arkema, SRF Ltd, 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 R32 Refrigerant 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 R32 Refrigerant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global R32 Refrigerant Market, Segmentation by Type:

Special Refrigerant

Mixed Refrigerant

Global R32 Refrigerant Market, Segmentation by Packaging Type:

Cylinder Packaged R32

ISO Tank R32

Disposable Can R32

Global R32 Refrigerant Market, Segmentation by Application Compatibility:

R32 For Split AC Systems

R32 For Heat Pumps

R32 For Chillers

Others

Global R32 Refrigerant Market, Segmentation by Application:

Residential Air Conditioning

Commercial Air Conditioning

Others

Companies Profiled:

Zhejiang Juhua

Sanmei Chemical

Daikin

Honeywell

Dongyue Group

Arkema

SRF Ltd

**Key Questions Answered:**

1. How big is the global R32 Refrigerant market?
2. What is the demand of the global R32 Refrigerant market?
3. What is the year over year growth of the global R32 Refrigerant market?
4. What is the production and production value of the global R32 Refrigerant market?
5. Who are the key producers in the global R32 Refrigerant market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 R32 Refrigerant Introduction
- 1.2 World R32 Refrigerant Supply & Forecast
  - 1.2.1 World R32 Refrigerant Production Value (2021 & 2025 & 2032)
  - 1.2.2 World R32 Refrigerant Production (2021-2032)
  - 1.2.3 World R32 Refrigerant Pricing Trends (2021-2032)
- 1.3 World R32 Refrigerant Production by Region (Based on Production Site)
  - 1.3.1 World R32 Refrigerant Production Value by Region (2021-2032)
  - 1.3.2 World R32 Refrigerant Production by Region (2021-2032)
  - 1.3.3 World R32 Refrigerant Average Price by Region (2021-2032)
  - 1.3.4 North America R32 Refrigerant Production (2021-2032)
  - 1.3.5 Europe R32 Refrigerant Production (2021-2032)
  - 1.3.6 China R32 Refrigerant Production (2021-2032)
  - 1.3.7 Japan R32 Refrigerant Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 R32 Refrigerant Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 R32 Refrigerant Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World R32 Refrigerant Demand (2021-2032)
- 2.2 World R32 Refrigerant Consumption by Region
  - 2.2.1 World R32 Refrigerant Consumption by Region (2021-2026)
  - 2.2.2 World R32 Refrigerant Consumption Forecast by Region (2027-2032)
- 2.3 United States R32 Refrigerant Consumption (2021-2032)
- 2.4 China R32 Refrigerant Consumption (2021-2032)
- 2.5 Europe R32 Refrigerant Consumption (2021-2032)
- 2.6 Japan R32 Refrigerant Consumption (2021-2032)
- 2.7 South Korea R32 Refrigerant Consumption (2021-2032)
- 2.8 ASEAN R32 Refrigerant Consumption (2021-2032)
- 2.9 India R32 Refrigerant Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World R32 Refrigerant Production Value by Manufacturer (2021-2026)

- 3.2 World R32 Refrigerant Production by Manufacturer (2021-2026)
- 3.3 World R32 Refrigerant Average Price by Manufacturer (2021-2026)
- 3.4 R32 Refrigerant Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global R32 Refrigerant Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for R32 Refrigerant in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for R32 Refrigerant in 2025
- 3.6 R32 Refrigerant Market: Overall Company Footprint Analysis
  - 3.6.1 R32 Refrigerant Market: Region Footprint
  - 3.6.2 R32 Refrigerant Market: Company Product Type Footprint
  - 3.6.3 R32 Refrigerant Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: R32 Refrigerant Production Value Comparison
  - 4.1.1 United States VS China: R32 Refrigerant Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: R32 Refrigerant Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: R32 Refrigerant Production Comparison
  - 4.2.1 United States VS China: R32 Refrigerant Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: R32 Refrigerant Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: R32 Refrigerant Consumption Comparison
  - 4.3.1 United States VS China: R32 Refrigerant Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: R32 Refrigerant Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based R32 Refrigerant Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based R32 Refrigerant Manufacturers, Headquarters and Production Site (States, Country)
  - 4.4.2 United States Based Manufacturers R32 Refrigerant Production Value

(2021-2026)

4.4.3 United States Based Manufacturers R32 Refrigerant Production (2021-2026)

4.5 China Based R32 Refrigerant Manufacturers and Market Share

4.5.1 China Based R32 Refrigerant Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers R32 Refrigerant Production Value (2021-2026)

4.5.3 China Based Manufacturers R32 Refrigerant Production (2021-2026)

4.6 Rest of World Based R32 Refrigerant Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based R32 Refrigerant Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers R32 Refrigerant Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers R32 Refrigerant Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World R32 Refrigerant Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Special Refrigerant

5.2.2 Mixed Refrigerant

5.3 Market Segment by Type

5.3.1 World R32 Refrigerant Production by Type (2021-2032)

5.3.2 World R32 Refrigerant Production Value by Type (2021-2032)

5.3.3 World R32 Refrigerant Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY PACKAGING TYPE**

6.1 World R32 Refrigerant Market Size Overview by Packaging Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Packaging Type

6.2.1 Cylinder Packaged R32

6.2.2 ISO Tank R32

6.2.3 Disposable Can R32

6.3 Market Segment by Packaging Type

6.3.1 World R32 Refrigerant Production by Packaging Type (2021-2032)

6.3.2 World R32 Refrigerant Production Value by Packaging Type (2021-2032)

6.3.3 World R32 Refrigerant Average Price by Packaging Type (2021-2032)

## **7 MARKET ANALYSIS BY APPLICATION COMPATIBILITY**

7.1 World R32 Refrigerant Market Size Overview by Application Compatibility: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application Compatibility

7.2.1 R32 For Split AC Systems

7.2.2 R32 For Heat Pumps

7.2.3 R32 For Chillers

7.2.4 Others

7.3 Market Segment by Application Compatibility

7.3.1 World R32 Refrigerant Production by Application Compatibility (2021-2032)

7.3.2 World R32 Refrigerant Production Value by Application Compatibility (2021-2032)

7.3.3 World R32 Refrigerant Average Price by Application Compatibility (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World R32 Refrigerant Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Residential Air Conditioning

8.2.2 Commercial Air Conditioning

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World R32 Refrigerant Production by Application (2021-2032)

8.3.2 World R32 Refrigerant Production Value by Application (2021-2032)

8.3.3 World R32 Refrigerant Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Zhejiang Juhua

9.1.1 Zhejiang Juhua Details

9.1.2 Zhejiang Juhua Major Business

9.1.3 Zhejiang Juhua R32 Refrigerant Product and Services

9.1.4 Zhejiang Juhua R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Zhejiang Juhua Recent Developments/Updates

9.1.6 Zhejiang Juhua Competitive Strengths & Weaknesses

9.2 Sanmei Chemical

9.2.1 Sanmei Chemical Details

- 9.2.2 Sanmei Chemical Major Business
- 9.2.3 Sanmei Chemical R32 Refrigerant Product and Services
- 9.2.4 Sanmei Chemical R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 Sanmei Chemical Recent Developments/Updates
- 9.2.6 Sanmei Chemical Competitive Strengths & Weaknesses
- 9.3 Daikin
  - 9.3.1 Daikin Details
  - 9.3.2 Daikin Major Business
  - 9.3.3 Daikin R32 Refrigerant Product and Services
  - 9.3.4 Daikin R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Daikin Recent Developments/Updates
  - 9.3.6 Daikin Competitive Strengths & Weaknesses
- 9.4 Honeywell
  - 9.4.1 Honeywell Details
  - 9.4.2 Honeywell Major Business
  - 9.4.3 Honeywell R32 Refrigerant Product and Services
  - 9.4.4 Honeywell R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 Honeywell Recent Developments/Updates
  - 9.4.6 Honeywell Competitive Strengths & Weaknesses
- 9.5 Dongyue Group
  - 9.5.1 Dongyue Group Details
  - 9.5.2 Dongyue Group Major Business
  - 9.5.3 Dongyue Group R32 Refrigerant Product and Services
  - 9.5.4 Dongyue Group R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 Dongyue Group Recent Developments/Updates
  - 9.5.6 Dongyue Group Competitive Strengths & Weaknesses
- 9.6 Arkema
  - 9.6.1 Arkema Details
  - 9.6.2 Arkema Major Business
  - 9.6.3 Arkema R32 Refrigerant Product and Services
  - 9.6.4 Arkema R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 Arkema Recent Developments/Updates
  - 9.6.6 Arkema Competitive Strengths & Weaknesses
- 9.7 SRF Ltd

- 9.7.1 SRF Ltd Details
- 9.7.2 SRF Ltd Major Business
- 9.7.3 SRF Ltd R32 Refrigerant Product and Services
- 9.7.4 SRF Ltd R32 Refrigerant Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 SRF Ltd Recent Developments/Updates
- 9.7.6 SRF Ltd Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 R32 Refrigerant Industry Chain
- 10.2 R32 Refrigerant Upstream Analysis
  - 10.2.1 R32 Refrigerant Core Raw Materials
  - 10.2.2 Main Manufacturers of R32 Refrigerant Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 R32 Refrigerant Production Mode
- 10.6 R32 Refrigerant Procurement Model
- 10.7 R32 Refrigerant Industry Sales Model and Sales Channels
  - 10.7.1 R32 Refrigerant Sales Model
  - 10.7.2 R32 Refrigerant Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World R32 Refrigerant Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World R32 Refrigerant Production Value by Region (2021-2026) & (USD Million)

Table 3. World R32 Refrigerant Production Value by Region (2027-2032) & (USD Million)

Table 4. World R32 Refrigerant Production Value Market Share by Region (2021-2026)

Table 5. World R32 Refrigerant Production Value Market Share by Region (2027-2032)

Table 6. World R32 Refrigerant Production by Region (2021-2026) & (Kilotons)

Table 7. World R32 Refrigerant Production by Region (2027-2032) & (Kilotons)

Table 8. World R32 Refrigerant Production Market Share by Region (2021-2026)

Table 9. World R32 Refrigerant Production Market Share by Region (2027-2032)

Table 10. World R32 Refrigerant Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World R32 Refrigerant Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. R32 Refrigerant Major Market Trends

Table 13. World R32 Refrigerant Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)

Table 14. World R32 Refrigerant Consumption by Region (2021-2026) & (Kilotons)

Table 15. World R32 Refrigerant Consumption Forecast by Region (2027-2032) & (Kilotons)

Table 16. World R32 Refrigerant Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key R32 Refrigerant Producers in 2025

Table 18. World R32 Refrigerant Production by Manufacturer (2021-2026) & (Kilotons)

Table 19. Production Market Share of Key R32 Refrigerant Producers in 2025

Table 20. World R32 Refrigerant Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global R32 Refrigerant Company Evaluation Quadrant

Table 22. World R32 Refrigerant Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and R32 Refrigerant Production Site of Key Manufacturer

Table 24. R32 Refrigerant Market: Company Product Type Footprint

Table 25. R32 Refrigerant Market: Company Product Application Footprint

Table 26. R32 Refrigerant Competitive Factors

Table 27. R32 Refrigerant New Entrant and Capacity Expansion Plans

Table 28. R32 Refrigerant Mergers & Acquisitions Activity

Table 29. United States VS China R32 Refrigerant Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China R32 Refrigerant Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China R32 Refrigerant Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based R32 Refrigerant Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers R32 Refrigerant Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers R32 Refrigerant Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers R32 Refrigerant Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers R32 Refrigerant Production Market Share (2021-2026)

Table 37. China Based R32 Refrigerant Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers R32 Refrigerant Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers R32 Refrigerant Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers R32 Refrigerant Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers R32 Refrigerant Production Market Share (2021-2026)

Table 42. Rest of World Based R32 Refrigerant Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers R32 Refrigerant Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers R32 Refrigerant Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers R32 Refrigerant Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers R32 Refrigerant Production Market Share (2021-2026)

Table 47. World R32 Refrigerant Production Value by Type, (USD Million), 2021 & 2025 & 2032

- Table 48. World R32 Refrigerant Production by Type (2021-2026) & (Kilotons)
- Table 49. World R32 Refrigerant Production by Type (2027-2032) & (Kilotons)
- Table 50. World R32 Refrigerant Production Value by Type (2021-2026) & (USD Million)
- Table 51. World R32 Refrigerant Production Value by Type (2027-2032) & (USD Million)
- Table 52. World R32 Refrigerant Average Price by Type (2021-2026) & (US\$/Ton)
- Table 53. World R32 Refrigerant Average Price by Type (2027-2032) & (US\$/Ton)
- Table 54. World R32 Refrigerant Production Value by Packaging Type, (USD Million), 2021 & 2025 & 2032
- Table 55. World R32 Refrigerant Production by Packaging Type (2021-2026) & (Kilotons)
- Table 56. World R32 Refrigerant Production by Packaging Type (2027-2032) & (Kilotons)
- Table 57. World R32 Refrigerant Production Value by Packaging Type (2021-2026) & (USD Million)
- Table 58. World R32 Refrigerant Production Value by Packaging Type (2027-2032) & (USD Million)
- Table 59. World R32 Refrigerant Average Price by Packaging Type (2021-2026) & (US\$/Ton)
- Table 60. World R32 Refrigerant Average Price by Packaging Type (2027-2032) & (US\$/Ton)
- Table 61. World R32 Refrigerant Production Value by Application Compatibility, (USD Million), 2021 & 2025 & 2032
- Table 62. World R32 Refrigerant Production by Application Compatibility (2021-2026) & (Kilotons)
- Table 63. World R32 Refrigerant Production by Application Compatibility (2027-2032) & (Kilotons)
- Table 64. World R32 Refrigerant Production Value by Application Compatibility (2021-2026) & (USD Million)
- Table 65. World R32 Refrigerant Production Value by Application Compatibility (2027-2032) & (USD Million)
- Table 66. World R32 Refrigerant Average Price by Application Compatibility (2021-2026) & (US\$/Ton)
- Table 67. World R32 Refrigerant Average Price by Application Compatibility (2027-2032) & (US\$/Ton)
- Table 68. World R32 Refrigerant Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 69. World R32 Refrigerant Production by Application (2021-2026) & (Kilotons)
- Table 70. World R32 Refrigerant Production by Application (2027-2032) & (Kilotons)
- Table 71. World R32 Refrigerant Production Value by Application (2021-2026) & (USD

Million)

Table 72. World R32 Refrigerant Production Value by Application (2027-2032) & (USD Million)

Table 73. World R32 Refrigerant Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World R32 Refrigerant Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Zhejiang?Juhua Basic Information, Manufacturing Base and Competitors

Table 76. Zhejiang?Juhua Major Business

Table 77. Zhejiang?Juhua R32 Refrigerant Product and Services

Table 78. Zhejiang?Juhua R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Zhejiang?Juhua Recent Developments/Updates

Table 80. Zhejiang?Juhua Competitive Strengths & Weaknesses

Table 81. Sanmei?Chemical Basic Information, Manufacturing Base and Competitors

Table 82. Sanmei?Chemical Major Business

Table 83. Sanmei?Chemical R32 Refrigerant Product and Services

Table 84. Sanmei?Chemical R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Sanmei?Chemical Recent Developments/Updates

Table 86. Sanmei?Chemical Competitive Strengths & Weaknesses

Table 87. Daikin Basic Information, Manufacturing Base and Competitors

Table 88. Daikin Major Business

Table 89. Daikin R32 Refrigerant Product and Services

Table 90. Daikin R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Daikin Recent Developments/Updates

Table 92. Daikin Competitive Strengths & Weaknesses

Table 93. Honeywell Basic Information, Manufacturing Base and Competitors

Table 94. Honeywell Major Business

Table 95. Honeywell R32 Refrigerant Product and Services

Table 96. Honeywell R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Honeywell Recent Developments/Updates

Table 98. Honeywell Competitive Strengths & Weaknesses

Table 99. Dongyue?Group Basic Information, Manufacturing Base and Competitors

Table 100. Dongyue?Group Major Business

Table 101. Dongyue?Group R32 Refrigerant Product and Services

Table 102. Dongyue?Group R32 Refrigerant Production (Kilotons), Price (US\$/Ton),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Dongyue?Group Recent Developments/Updates

Table 104. Dongyue?Group Competitive Strengths & Weaknesses

Table 105. Arkema Basic Information, Manufacturing Base and Competitors

Table 106. Arkema Major Business

Table 107. Arkema R32 Refrigerant Product and Services

Table 108. Arkema R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Arkema Recent Developments/Updates

Table 110. Arkema Competitive Strengths & Weaknesses

Table 111. SRF?Ltd Basic Information, Manufacturing Base and Competitors

Table 112. SRF?Ltd Major Business

Table 113. SRF?Ltd R32 Refrigerant Product and Services

Table 114. SRF?Ltd R32 Refrigerant Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. SRF?Ltd Recent Developments/Updates

Table 116. SRF?Ltd Competitive Strengths & Weaknesses

Table 117. Global Key Players of R32 Refrigerant Upstream (Raw Materials)

Table 118. Global R32 Refrigerant Typical Customers

Table 119. R32 Refrigerant Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. R32 Refrigerant Picture

Figure 2. World R32 Refrigerant Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World R32 Refrigerant Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World R32 Refrigerant Production (2021-2032) & (Kilotons)

Figure 5. World R32 Refrigerant Average Price (2021-2032) & (US\$/Ton)

Figure 6. World R32 Refrigerant Production Value Market Share by Region (2021-2032)

Figure 7. World R32 Refrigerant Production Market Share by Region (2021-2032)

Figure 8. North America R32 Refrigerant Production (2021-2032) & (Kilotons)

Figure 9. Europe R32 Refrigerant Production (2021-2032) & (Kilotons)

Figure 10. China R32 Refrigerant Production (2021-2032) & (Kilotons)

Figure 11. Japan R32 Refrigerant Production (2021-2032) & (Kilotons)

Figure 12. R32 Refrigerant Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 15. World R32 Refrigerant Consumption Market Share by Region (2021-2032)

Figure 16. United States R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 17. China R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 18. Europe R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 19. Japan R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 20. South Korea R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 21. ASEAN R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 22. India R32 Refrigerant Consumption (2021-2032) & (Kilotons)

Figure 23. Producer Shipments of R32 Refrigerant by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for R32 Refrigerant Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for R32 Refrigerant Markets in 2025

Figure 26. United States VS China: R32 Refrigerant Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: R32 Refrigerant Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: R32 Refrigerant Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers R32 Refrigerant Production Market Share 2025

Figure 30. China Based Manufacturers R32 Refrigerant Production Market Share 2025

Figure 31. Rest of World Based Manufacturers R32 Refrigerant Production Market Share 2025

Figure 32. World R32 Refrigerant Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World R32 Refrigerant Production Value Market Share by Type in 2025

Figure 34. Special Refrigerant

Figure 35. Mixed Refrigerant

Figure 36. World R32 Refrigerant Production Market Share by Type (2021-2032)

Figure 37. World R32 Refrigerant Production Value Market Share by Type (2021-2032)

Figure 38. World R32 Refrigerant Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World R32 Refrigerant Production Value by Packaging Type, (USD Million), 2021 & 2025 & 2032

Figure 40. World R32 Refrigerant Production Value Market Share by Packaging Type in 2025

Figure 41. Cylinder Packaged R32

Figure 42. ISO Tank R32

Figure 43. Disposable Can R32

Figure 44. World R32 Refrigerant Production Market Share by Packaging Type (2021-2032)

Figure 45. World R32 Refrigerant Production Value Market Share by Packaging Type (2021-2032)

Figure 46. World R32 Refrigerant Average Price by Packaging Type (2021-2032) & (US\$/Ton)

Figure 47. World R32 Refrigerant Production Value by Application Compatibility, (USD Million), 2021 & 2025 & 2032

Figure 48. World R32 Refrigerant Production Value Market Share by Application Compatibility in 2025

Figure 49. R32 For Split AC Systems

Figure 50. R32 For Heat Pumps

Figure 51. R32 For Chillers

Figure 52. Others

Figure 53. World R32 Refrigerant Production Market Share by Application Compatibility (2021-2032)

Figure 54. World R32 Refrigerant Production Value Market Share by Application Compatibility (2021-2032)

Figure 55. World R32 Refrigerant Average Price by Application Compatibility

(2021-2032) & (US\$/Ton)

Figure 56. World R32 Refrigerant Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World R32 Refrigerant Production Value Market Share by Application in 2025

Figure 58. Residential Air Conditioning

Figure 59. Commercial Air Conditioning

Figure 60. Others

Figure 61. World R32 Refrigerant Production Market Share by Application (2021-2032)

Figure 62. World R32 Refrigerant Production Value Market Share by Application (2021-2032)

Figure 63. World R32 Refrigerant Average Price by Application (2021-2032) & (US\$/Ton)

Figure 64. R32 Refrigerant Industry Chain

Figure 65. R32 Refrigerant Procurement Model

Figure 66. R32 Refrigerant Sales Model

Figure 67. R32 Refrigerant Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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