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Global Sustainable Refrigerant Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/G890BAD0023BEN.html
Date: November 2026
Pages: 128
Price: US$ 3,480.00 (Single User License)
ID: G890BAD0023BEN

Abstracts

According to our (Global Info Research) latest study, the global Sustainable Refrigerant market size was valued at US$ 9569 million in 2025 and is forecast to a readjusted size of US$ 11855 million by 2032 with a CAGR of 3.1% during review period.

In 2025, the global production of sustainable refrigerant reached approximately 232,500 tons, with an average global market price of around US$40,000/ton. In the same year, the global total production capacity of sustainable refrigerant reached 290,600 tons. The industry average gross profit margin of this product reached 35%.Sustainable refrigerants refer to a class of refrigerants that, while meeting the requirements for heat exchange performance, safety, stability, and equipment compatibility in refrigeration, air conditioning, and heat pump systems, can significantly reduce their impact on the ozone layer and global climate. They typically have zero or low ozone depletion potential (ODP) and low global warming potential (GWP). They mainly include natural refrigerants such as carbon dioxide (R744), ammonia (R717), propane (R290), and isobutane (R600a), as well as low-GWP synthetic refrigerants (HFO) and some mixed refrigerants that meet low-carbon requirements. Compared to traditional high-GWP HFC refrigerants, sustainable refrigerants place greater emphasis on their full life-cycle environmental impact, energy efficiency, leakage emissions, safety management, and recycling, representing a crucial technological path for the refrigeration industry towards low-carbon, environmentally friendly, and high-energy-efficiency development.

The upstream of the sustainable refrigerant industry chain mainly includes fluorite, hydrofluoric acid, chlorinated hydrocarbons, fluorinated chemical intermediates, and basic chemical raw materials used to synthesize HFO and low-GWP mixed refrigerants. Natural refrigerants also involve the purification, processing, and supply of gaseous or

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hydrocarbon raw materials such as carbon dioxide, ammonia, propane, and isobutane. The midstream mainly consists of refrigerant manufacturers, formulation and blending companies, filling companies, and recycling and regeneration companies. These companies are responsible for refrigerant synthesis, purification, blending, quality testing, storage, transportation, filling, and the recycling and regeneration of waste refrigerants. They also work with compressor, heat exchanger, valve, pipeline, and control system companies to promote system adaptation for different refrigerants. The downstream mainly applies to residential and commercial air conditioners, automotive air conditioners, refrigerators and freezers, commercial refrigeration equipment, industrial refrigeration, cold chain logistics, and heat pumps. Ultimately, demand is influenced by the upgrading of refrigeration equipment, energy efficiency standards, environmental regulations, and the replacement of low-GWP refrigerants.

The sustainable refrigerant market has a clear long-term growth trend, driven by global policies and industry demands to reduce the use of high-GWP refrigerants, improve the energy efficiency of refrigeration equipment, and reduce carbon emissions throughout the refrigeration industry's lifecycle. With the continued implementation of the Kigali Amendment to the Montreal Protocol and related refrigerant management policies in major markets such as Europe, the United States, and China, traditional high-GWP HFC refrigerants will gradually be subject to quotas, usage scenarios, and new equipment applications, driving the expanded application of R290, R600a, R744, R717, HFO, and low-GWP mixed refrigerants in air conditioning, automotive air conditioning, refrigerators, commercial refrigeration, and heat pumps. At the same time, different sustainable refrigerants still face technical and safety hurdles such as flammability, toxicity, high operating pressure, system material compatibility, investment in special equipment, and training of maintenance personnel. Therefore, the future market will not be completely replaced by a single refrigerant, but is more likely to form a pattern of parallel development of "natural refrigerants + HFO + low GWP mixed refrigerants". The focus of industry competition will also gradually shift from simple refrigerant supply to low GWP formulation development, system adaptation, safety control, recycling and regeneration, and full life cycle carbon management capabilities.

Report Scope

This report is a detailed and comprehensive analysis for global Sustainable Refrigerant 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

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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 Sustainable Refrigerant market size and forecasts, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

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

Global Sustainable Refrigerant 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 Sustainable Refrigerant 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 Sustainable Refrigerant

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 Sustainable Refrigerant 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, Sinochem, Puyang Zhongwei

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Fine Chemical, Shandong Yuean Chemical Industry, Aeropres, Engas Australasia, Hychill, Chemours, Honeywell, Arkema, etc.

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

Sustainable Refrigerant 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 Segmentation

Market segment by Type

Natural Refrigerants

HFOs

Mixed Refrigerants

Others

Market segment by Source

Natural Refrigerants

Synthetic Refrigerants

Market segment by GWP Value

<10

10–150

150–750

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750–1500

Market segment by Application

Air Conditioning (Residential Split Air Conditioners, Central Air Conditioning, Multi-Split Systems, Heat Pumps, Chillers, etc.)

Automotive Air Conditioning (Passenger Vehicle Air Conditioning, Commercial Vehicle Air Conditioning, New Energy Vehicle Heat Pump Air Conditioning, Battery Thermal Management, etc.)

Refrigerators (Residential Refrigerators, Freezers, Commercial Refrigerated Display Cases, Medical Refrigeration Equipment, etc.)

Others

Major players covered

Linde

Sinochem

Puyang Zhongwei Fine Chemical

Shandong Yuean Chemical Industry

Aeropres

Engas Australasia

Hychill

Chemours

Honeywell

Arkema

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Huanxin Fluoro

Zhejiang Juhua Co.,Ltd.

Dongyue Group

Jiangsu Meilan Chemical Co., Ltd

Daikin Industries, Ltd.

AGC Inc.

Hudson Technologies, Inc

Evonik Industries AG

Westfalen AG & Co. KG

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)

Chapter Outline

Chapter 1, to describe Sustainable Refrigerant product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Sustainable Refrigerant 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 Sustainable Refrigerant 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 Sustainable Refrigerant.

Chapter 14 and 15, to describe Sustainable Refrigerant sales channel, distributors, customers, research findings and conclusion.

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