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Global Sustainable Refrigerant Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Sustainable Refrigerant market size is expected to reach $ 11855 million by 2032, rising at a market growth of 3.1% CAGR during the forecast period (2026-2032).

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 hydrocarbon raw materials such as carbon dioxide, ammonia, propane, and isobutane. The midstream mainly consists of refrigerant manufacturers, formulation and blending

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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 studies the global Sustainable Refrigerant production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Sustainable Refrigerant and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends

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and competition, as well as details the characteristics of Sustainable Refrigerant that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Sustainable 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 Linde, Sinochem, Puyang Zhongwei 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.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Sustainable 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 Sustainable Refrigerant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Sustainable Refrigerant Market, Segmentation by Type:

Natural Refrigerants

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HFOs

Mixed Refrigerants

Others

Global Sustainable Refrigerant Market, Segmentation by Source:

Natural Refrigerants

Synthetic Refrigerants

Global Sustainable Refrigerant Market, Segmentation by GWP Value:

<10

10–150

150–750

750–1500

Global Sustainable Refrigerant Market, Segmentation 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

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Companies Profiled:

Linde

Sinochem

Puyang Zhongwei Fine Chemical

Shandong Yuean Chemical Industry

Aeropres

Engas Australasia

Hychill

Chemours

Honeywell

Arkema

Huanxin Fluoro

Zhejiang Juhua Co.,Ltd.

Dongyue Group

Jiangsu Meilan Chemical Co., Ltd

Daikin Industries, Ltd.

AGC Inc.

Hudson Technologies, Inc

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Evonik Industries AG

Westfalen AG & Co. KG

Key Questions Answered

1. How big is the global Sustainable Refrigerant market?
2. What is the demand of the global Sustainable Refrigerant market?
3. What is the year over year growth of the global Sustainable Refrigerant market?
4. What is the total value of the global Sustainable Refrigerant market?
5. Who are the Major Players in the global Sustainable Refrigerant market?
6. What are the growth factors driving the market demand?

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