

Global Zero ODP and Low GWP Refrigerants Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

<https://marketpublishers.com/r/G10D60F62E26EN.html>

Date: November 2025

Pages: 131

Price: US\$ 3,480.00 (Single User License)

ID: G10D60F62E26EN

Abstracts

According to our (Global Info Research) latest study, the global Zero ODP and Low GWP Refrigerants market size was valued at US\$ 2626 million in 2024 and is forecast to a readjusted size of USD 3833 million by 2031 with a CAGR of 5.6% during review period.

In this report, we will assess the current U.S. tariff framework alongside international policy adaptations, analyzing their effects on competitive market structures, regional economic dynamics, and supply chain resilience.

The market for Low Global Warming Potential (GWP) refrigerants is undergoing a significant transformation driven by stringent regulatory frameworks, environmental concerns, and technological advancements. As global awareness of climate change intensifies, regulations such as the Kigali Amendment to the Montreal Protocol and the European Union's F-Gas Regulation are mandating reductions in the use of high-GWP refrigerants like HFCs, propelling the shift towards alternatives with lower GWP. This regulatory pressure is fostering a rapid adoption of low-GWP refrigerants across various sectors including commercial, industrial, and residential refrigeration. Among the prominent low-GWP alternatives are hydrofluoroolefins (HFOs), which, such as HFO-1234yf, offer significantly reduced GWP compared to traditional HFCs, and are increasingly used in automotive air conditioning and other applications. HFC replacements like R32 (Difluoromethane) and R-152a are also gaining prominence. R32, with a GWP of around 675, is a direct and efficient replacement for higher-GWP refrigerants like R410A in air conditioning systems, while R-152a, with a GWP of 138, is used in specific applications where lower environmental impact is crucial, despite its flammability. Additionally, natural refrigerants like carbon dioxide (CO₂), ammonia

(R-717), and hydrocarbons (e.g., propane R-290) are gaining traction due to their negligible or zero GWP and high efficiency, making them suitable for diverse applications from commercial refrigeration to industrial processes. Technological advancements are also playing a crucial role in facilitating this transition, with innovations improving the efficiency, safety, and applicability of low-GWP refrigerants. For example, new system designs and refrigerant blends are enhancing the performance of low-GWP options and addressing challenges such as high pressures or flammability. The market is experiencing robust growth, driven by both regulatory compliance and the pursuit of sustainability. This growth is further supported by increasing investment in research and development, aimed at optimizing the performance and expanding the applications of low-GWP refrigerants. As industries and governments align with more ambitious climate goals, the trend towards low-GWP refrigerants is expected to continue accelerating, reshaping the refrigeration and air conditioning landscape with a focus on reducing environmental impact and enhancing energy efficiency.

Global and regional regulations are the primary drivers for the adoption of low-GWP refrigerants. Agreements like the Kigali Amendment to the Montreal Protocol, which mandates a global phase-down of HFCs, are pushing countries to reduce their reliance on high-GWP refrigerants. In the European Union, the F-Gas Regulation strictly limits the use of high-GWP refrigerants, further accelerating the transition. Similar initiatives in the U.S., Japan, and other regions are enforcing the shift to more sustainable refrigerant solutions.

As concerns over climate change grow, there is increasing pressure on industries to minimize their carbon footprints. Traditional HFC refrigerants contribute significantly to global warming due to their high-GWP values. Switching to low-GWP alternatives like HFOs, natural refrigerants (ammonia, CO₂, hydrocarbons), and low-GWP HFCs (R32) allows companies to significantly reduce their greenhouse gas emissions.

Many low-GWP refrigerants, especially natural refrigerants and some HFOs, provide high energy efficiency, which leads to cost savings over time. This is particularly important in energy-intensive industries like refrigeration and air conditioning. The ability to combine environmental benefits with energy savings is a strong incentive for companies to make the switch.

This report is a detailed and comprehensive analysis for global Zero ODP and Low GWP Refrigerants 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 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 Zero ODP and Low GWP Refrigerants market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Zero ODP and Low GWP Refrigerants market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Zero ODP and Low GWP Refrigerants market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Zero ODP and Low GWP Refrigerants market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2020-2025

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 Zero ODP and Low GWP Refrigerants
- 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 Zero ODP and Low GWP Refrigerants 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 Honeywell, Chemours, Zhejiang Juhua, Arkema, Zhejiang Yonghe, Linde Group, Daikin, Puyang Zhongwei Fine Chemical Co, Dongyue Group, Zhejiang Sanmei Chemical, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Zero ODP and Low GWP Refrigerants market is split by Type and by Application. For the period 2020-2031, 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 segment by Type

HFC Replacements

Natural Refrigerants

HFO Refrigerants

Market segment by Application

Household Air Conditioning and Refrigeration

Commercial and Industrial Refrigeration

Commercial and Industrial Air Conditioning

Transport Air Conditioning

Major players covered

Honeywell

Chemours

Zhejiang Juhua

Arkema

Zhejiang Yonghe

Linde Group

Daikin

Puyang Zhongwei Fine Chemical Co

Dongyue Group

Zhejiang Sanmei Chemical

Zibo Feiyuan Chemical

Shandong Yue'an New Material Co

Shandong Hua'an

Aeropres Corporation

Messer Group

Tazzetti

Zhejiang Huanxin Fluoromaterial Co

Evonik

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 Zero ODP and Low GWP Refrigerants product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Zero ODP and Low GWP Refrigerants, with price, sales quantity, revenue, and global market share of Zero ODP and Low GWP Refrigerants from 2020 to 2025.

Chapter 3, the Zero ODP and Low GWP Refrigerants competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Zero ODP and Low GWP Refrigerants breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2020 to 2031.

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 2020 to 2031.

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 2020 to 2025. and Zero ODP and Low GWP Refrigerants market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

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 Zero ODP and Low GWP Refrigerants.

Chapter 14 and 15, to describe Zero ODP and Low GWP Refrigerants sales channel, distributors, customers, research findings and conclusion.

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