

Global Zero ODP and Low GWP Refrigerants Market Growth 2026-2032

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Abstracts

The global Zero ODP and Low GWP Refrigerants market size is predicted to grow from US\$ 2626 million in 2025 to US\$ 3910 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the “Zero ODP and Low GWP Refrigerants Industry Forecast” looks at past sales and reviews total world Zero ODP and Low GWP Refrigerants sales in 2025, providing a comprehensive analysis by region and market sector of projected Zero ODP and Low GWP Refrigerants sales for 2026 through 2032. With Zero ODP and Low GWP Refrigerants sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Zero ODP and Low GWP Refrigerants industry.

This Insight Report provides a comprehensive analysis of the global Zero ODP and Low

GWP Refrigerants landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Zero ODP and Low GWP Refrigerants portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Zero ODP and Low GWP Refrigerants market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Zero ODP and Low GWP Refrigerants and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Zero ODP and Low GWP Refrigerants.

This report presents a comprehensive overview, market shares, and growth opportunities of Zero ODP and Low GWP Refrigerants market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

HFC Replacements

Natural Refrigerants

HFO Refrigerants

Segmentation by Application:

Household Air Conditioning and Refrigeration

Commercial and Industrial Refrigeration

Commercial and Industrial Air Conditioning

Transport Air Conditioning

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Zero ODP and Low GWP Refrigerants market?

What factors are driving Zero ODP and Low GWP Refrigerants market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Zero ODP and Low GWP Refrigerants market opportunities vary by end market size?

How does Zero ODP and Low GWP Refrigerants break out by Type, by Application?

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