

R-1233zd Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

R-1233zd Market Summary

The R-1233zd market represents a critical segment within the fourth-generation hydrofluoroolefin (HFO) refrigerants industry, characterized by superior environmental performance and advanced technological capabilities. R-1233zd (trans-1-chloro-3,3,3-trifluoropropene) is an innovative HFO refrigerant that demonstrates exceptional environmental properties including low toxicity, ultra-low Global Warming Potential (GWP of 1), zero Ozone Depletion Potential (ODP), and non-flammability characteristics. The global R-1233zd market is estimated to be valued between 0.7-1.4 billion USD in 2025, representing a significant portion of the advanced refrigerants sector. The market is projected to experience steady compound annual growth rates ranging from 3.5% to 5.5% through 2030, driven by environmental regulations, technology transitions, and expanding applications in sustainable cooling and insulation solutions.

Application Analysis and Market Segmentation

The R-1233zd market segments into distinct application areas, each demonstrating unique growth characteristics and market dynamics influenced by regulatory requirements and technological advancement.

Centrifugal Chiller Applications

The centrifugal chiller segment represents the largest and most established application

for R-1233zd, accounting for a substantial portion of global demand. R-1233zd serves as a direct replacement for R-123 in low-pressure centrifugal chillers, offering superior environmental performance with a GWP that is 99.9% lower than R-245fa. This segment demonstrates growth rates of 4-6% annually, driven by regulatory phase-outs of high-GWP refrigerants, increasing environmental awareness among building owners, and the retrofit potential of existing chiller installations.

The segment benefits from strong support from major chiller manufacturers who have developed optimized equipment designs specifically for R-1233zd. Commercial and industrial building applications drive primary demand, supported by green building certification requirements and corporate sustainability initiatives. The segment faces some challenges from alternative low-GWP solutions but maintains competitive advantages through proven performance and established supply chains.

Polyurethane Foaming Agent Applications

R-1233zd serves as a physical blowing agent in the production of closed-cell polyurethane foams used in building insulation and cold chain applications. This segment shows robust growth rates of 5-7% annually, driven by increasing demand for energy-efficient building materials and the phase-out of high-GWP blowing agents. The application benefits from the superior insulation properties of R-1233zd-blown foams and their contribution to building energy efficiency.

The segment demonstrates particular strength in building insulation applications where long-term thermal performance and environmental compliance are critical. Cold chain applications, including refrigerated transport and storage facilities, represent additional growth opportunities as the food and pharmaceutical logistics sectors expand globally.

Other Applications

Additional applications include specialty cooling systems, heat pump applications, and emerging uses in industrial processes. This segment shows variable growth rates of 3-5% annually, depending on specific application development and regulatory drivers. Research continues into new applications that can leverage R-1233zd's unique property profile.

Regional Market Distribution and Geographic Trends

The R-1233zd market demonstrates distinct regional characteristics influenced by environmental regulations, industrial infrastructure, and climate requirements. North America represents a significant market share, driven by stringent environmental regulations, established chiller infrastructure, and early adoption of low-GWP technologies. The region benefits from strong regulatory support for HFO refrigerants and substantial commercial building stock requiring chiller upgrades.

Europe maintains important market positions through aggressive environmental policies, building energy efficiency requirements, and strong industrial foam production capabilities. The European market demonstrates particular strength in polyurethane foam applications, supported by building insulation standards and sustainability initiatives. Countries including Germany, France, and the United Kingdom represent key markets within the region.

Asia-Pacific shows the highest growth potential, with projected growth rates of 6-8% annually, driven by rapid industrialization, expanding commercial construction, and increasing environmental awareness. China represents the largest regional market, supported by substantial manufacturing capacity additions and growing domestic demand for both refrigeration and foam applications. Japan demonstrates strong adoption in high-efficiency cooling applications, while Southeast Asian markets show emerging potential. Manufacturing capacity concentration in Asia-Pacific has increased significantly, with multiple Chinese companies establishing production facilities to serve both domestic and export markets. This regional production expansion has enhanced supply security and cost competitiveness for global customers.

Other regions, including Latin America and the Middle East, represent smaller but growing market segments, driven by expanding commercial construction and increasing adoption of international environmental standards.

Key Market Players and Competitive Landscape

The R-1233zd market features a concentrated competitive landscape dominated by established multinational chemical companies with advanced fluorochemical capabilities.

Honeywell

Honeywell maintains a leading market position through its extensive research and development capabilities, established customer relationships, and integrated manufacturing operations. The company has invested significantly in HFO technology development and maintains production facilities serving global markets. Honeywell benefits from its comprehensive refrigerants portfolio and strong relationships with equipment manufacturers.

Arkema

Arkema operates as a major global player with significant R-1233zd production capabilities and strategic partnerships in key markets. The company has established partnerships with Chinese manufacturers to expand production capacity, including a 5,000-ton facility developed in collaboration with Shandong Aofan New Material Co. Ltd. Arkema benefits from its integrated fluorochemicals business and established European market presence.

Daikin

Daikin leverages its position as a leading air conditioning and refrigeration equipment manufacturer to support R-1233zd market development. The company's integrated approach combining refrigerant production with equipment manufacturing provides competitive advantages in market development and customer support.

Central Glass

Central Glass operates significant production capabilities for fluorochemical products, including R-1233zd, serving both domestic Japanese markets and international customers through established distribution networks.

Chinese Market Players

Several Chinese companies have established substantial production capabilities, contributing to global supply capacity expansion. Shandong Hua'an New Material Co. Ltd. operates 6,000 tons of annual capacity, while Sinochem Lantian Honeywell New Materials Co. Ltd. maintains 12,000 tons of capacity through its joint venture structure.

Quanzhou Yuji Advanced Materials Co. Ltd. operates 15,500 tons of annual capacity, representing one of the larger production facilities globally.

Zhejiang Zhongxin Fluoride Materials Co. Ltd. contributes 10,000 tons of annual capacity, while several additional companies including Zhejiang Yonghe Refrigerant Co. Ltd. and Jiujiang JiuHong New Materials Co. Ltd. have announced capacity expansion plans totaling additional thousands of tons.

Porter's Five Forces Analysis

Supplier Power: Moderate to High

The R-1233zd industry depends on specialized fluorochemical raw materials and manufacturing equipment that are available from limited suppliers globally. Key raw materials include specialized fluorine compounds and chlorinated intermediates that require sophisticated production capabilities. The technical complexity and environmental compliance requirements create supplier concentration, particularly for high-purity materials required for refrigerant applications.

Buyer Power: Moderate

Major buyers include chiller manufacturers, foam producers, and industrial users who demonstrate moderate purchasing power through their technical requirements and volume commitments. Equipment manufacturers often maintain multiple supplier relationships but require consistent quality and reliable supply. The specialized nature of R-1233zd and the technical support required for application development limit buyer power to negotiate significantly on pricing.

Threat of New Entrants: Low

Entry barriers remain substantial due to the technical expertise required for fluorochemical production, significant capital investment requirements for manufacturing facilities, and extensive regulatory approval processes. Environmental compliance requirements, safety considerations, and the need for established customer relationships in specialized applications create additional barriers. Patent protection and proprietary manufacturing processes further limit new entry potential.

Threat of Substitutes: Moderate

Alternative low-GWP refrigerants and blowing agents exist, including other HFO compounds, natural refrigerants, and alternative foam technologies. However, R-1233zd's unique combination of environmental performance, safety characteristics, and application suitability limits direct substitution in many applications. The established infrastructure and equipment optimization for R-1233zd create switching costs for end users.

Competitive Rivalry: Moderate to High

The industry demonstrates significant competitive intensity among established players, with competition focused on production capacity, cost competitiveness, technical support, and geographic coverage. Companies compete through manufacturing scale, customer relationships, and application development capabilities while managing substantial fixed costs and environmental compliance requirements.

Market Opportunities and Challenges

Opportunities

The R-1233zd market benefits from substantial growth opportunities driven by environmental regulations and technology transitions. Global phase-down schedules for high-GWP refrigerants create sustained demand for low-GWP alternatives, with R-1233zd positioned as a preferred solution for specific applications. The Montreal Protocol Kigali Amendment and regional regulations including the EU F-Gas Regulation drive mandatory transitions that support market growth.

Building energy efficiency requirements and green building certification programs create additional opportunities, particularly as commercial building owners seek sustainable cooling solutions. The growing emphasis on corporate sustainability and carbon footprint reduction drives adoption among large commercial and industrial users.

Geographic expansion opportunities exist in developing markets where refrigeration infrastructure is expanding and environmental awareness is increasing. The growth of cold chain logistics, driven by e-commerce and pharmaceutical distribution

requirements, creates new application opportunities for R-1233zd in specialized cooling applications.

Technological advancement in foam applications presents opportunities for market expansion, particularly as building insulation requirements become more stringent and energy efficiency becomes increasingly important. The development of new application areas that can leverage R-1233zd's unique property profile offers additional growth potential.

Challenges

The market faces several significant challenges that may impact growth potential. Production cost pressures from complex manufacturing processes and raw material availability create ongoing margin challenges, particularly as the market becomes more competitive. The technical complexity of fluorochemical production requires continuous investment in manufacturing capabilities and environmental compliance.

Regulatory uncertainty and potential future restrictions on fluorinated compounds pose long-term risks to market development. While current regulations favor low-GWP solutions like R-1233zd, ongoing environmental assessments and potential future restrictions create uncertainty for long-term investment planning.

Competition from alternative technologies, including natural refrigerants and next-generation synthetic solutions, may limit market growth in specific applications. The development of competitive low-GWP alternatives could impact R-1233zd's market position over time.

Supply chain complexity and the need for specialized handling and distribution create operational challenges, particularly for smaller market participants. The global nature of the market and concentration of production capacity in specific regions create supply security considerations for customers.

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