

# R-1234ze Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### R-1234ze Market Summary

R-1234ze represents a critical advancement in the fluorinated chemicals sector, specifically designed as a fourth-generation hydrofluoroolefin (HFO) refrigerant that addresses growing environmental concerns while maintaining superior performance characteristics. This synthetic refrigerant exhibits exceptional thermodynamic properties with significantly reduced global warming potential compared to traditional hydrofluorocarbon alternatives, positioning it as a cornerstone solution for industries transitioning toward sustainable cooling technologies. The compound's molecular structure enables exceptional heat transfer efficiency while demonstrating non-flammable characteristics under normal operating conditions, making it particularly suitable for commercial and industrial applications. Its chemical stability and compatibility with existing refrigeration infrastructure have accelerated adoption rates across developed markets, particularly in sectors requiring precise temperature control and environmental compliance. The global R-1234ze market demonstrates robust fundamentals driven by regulatory pressures and technological advancement requirements. Current market valuation ranges between 300-700 million USD in 2025, with projected compound annual growth rates spanning 4.5%-8.5% through 2030. This growth trajectory reflects increasing demand from refrigeration, polyurethane foaming, and aerosol propellant applications, supported by expanding industrial capacity and regulatory mandates favoring low-GWP alternatives.

### Regional Market Dynamics

The R-1234ze market exhibits distinct regional consumption patterns, with Europe

emerging as the primary demand driver due to stringent F-Gas regulations and aggressive decarbonization targets. European markets account for the largest consumption share, supported by comprehensive regulatory frameworks mandating phase-down of high-GWP refrigerants across commercial and industrial sectors. The region's mature HVAC infrastructure and proactive environmental policies create sustained demand for R-1234ze adoption.

North American markets, particularly the United States, demonstrate significant consumption volumes driven by EPA regulations under the SNAP program and growing corporate sustainability commitments. The region's large-scale commercial refrigeration sector and expanding data center infrastructure support consistent demand growth, with adoption rates accelerating in response to state-level environmental regulations.

Asian markets, led by Japan, show increasing R-1234ze utilization as regulatory frameworks evolve and industrial sectors prioritize environmental compliance. Japan's advanced manufacturing capabilities and early adoption of next-generation refrigerants create a foundation for sustained market growth, while other Asian markets gradually transition from traditional alternatives.

## **Application Segment Analysis**

The refrigerant application segment dominates R-1234ze consumption, representing the largest market share with projected growth rates of 5.0%-7.5% annually. This segment benefits from widespread commercial refrigeration system upgrades, supermarket chain retrofits, and new installation requirements mandating low-GWP alternatives. The compound's superior thermodynamic properties and equipment compatibility drive adoption across chillers, heat pumps, and commercial refrigeration systems.

Polyurethane foaming agent applications demonstrate strong growth potential with estimated annual growth rates of 4.0%-6.5%. The construction industry's increasing focus on energy-efficient insulation materials and building codes requiring improved thermal performance support expanding R-1234ze utilization in rigid foam production. The compound's excellent expansion characteristics and thermal insulation properties make it particularly valuable for high-performance building applications.

Aerosol propellant applications exhibit moderate but steady growth patterns, with projected annual growth rates of 3.5%-5.5%. This segment benefits from

regulatory phase-outs of traditional propellants and growing demand for environmentally compliant aerosol products across personal care, pharmaceutical, and industrial cleaning applications.

## Key Market Participants

Honeywell International maintains market leadership through extensive research and development capabilities, comprehensive patent portfolios, and established distribution networks. The company's integrated approach to fluorinated chemicals production and strong relationships with equipment manufacturers position it advantageously for sustained market participation.

Daikin Industries leverages its global refrigeration expertise and manufacturing scale to maintain significant market presence. The company's focus on complete cooling solutions and strong Asian market presence support its competitive positioning in the R-1234ze sector.

Central Glass contributes specialized fluorinated chemicals expertise and technical innovation capabilities, particularly in high-purity applications requiring stringent quality standards.

Among Chinese manufacturers, Shandong Hua'an New Material Co. Ltd. operates 4,000 tons of annual production capacity, focusing on cost-competitive R-1234ze supply for domestic and export markets. Zhejiang Zhongxin Fluoride Materials Co. Ltd. maintains 5,000 tons of production capacity, emphasizing quality consistency and technical support services. Quanzhou Yuji Advanced Materials Co. Ltd. operates 5,000 tons of annual capacity with strong regional market penetration.

Significant capacity expansions are underway, with Zhejiang Yonghe Refrigerant Co. Ltd. planning 13,000 tons of new capacity scheduled for 2026 commissioning, representing substantial market supply growth. Jiujiang JiuHong New Materials Co. Ltd. planned 5,000 tons of new capacity in 2023, demonstrating continued industry confidence in long-term demand prospects.

## Porter Five Forces Analysis

**Supplier Power:** Moderate to high supplier power characterizes the R-1234ze market due to limited raw material sources and specialized manufacturing requirements. Key fluorinated precursors require advanced production capabilities and significant capital investments, concentrating supplier options among established chemical manufacturers. Long-term supply agreements and vertical integration strategies become critical for securing reliable raw material access.

**Buyer Power:** Moderate buyer power exists due to increasing R-1234ze supplier options and standardized product specifications. Large-scale commercial refrigeration companies and foam manufacturers can leverage volume purchasing for favorable pricing, while smaller users face limited negotiating power. Growing regulatory requirements reduce buyer flexibility in selecting alternatives, somewhat constraining their bargaining position.

**Competitive Rivalry:** Intense competitive rivalry drives innovation and pricing pressure across the R-1234ze market. Established multinational corporations compete against emerging regional manufacturers, creating dynamic competitive conditions. Patent protection provides temporary competitive advantages, while manufacturing scale and distribution capabilities determine long-term market positioning.

**Threat of Substitutes:** Moderate substitute threat exists from alternative low-GWP refrigerants and natural refrigerants in specific applications. Ammonia, CO<sub>2</sub>, and other HFO compounds offer competitive performance in certain use cases, while technological advancement continues developing new alternatives. However, R-1234ze's balanced performance characteristics and regulatory approval status provide competitive protection.

**Barriers to Entry:** High barriers to entry result from substantial capital requirements, complex regulatory approval processes, and established customer relationships. Manufacturing facility investments, environmental compliance costs, and technical expertise requirements create significant entry obstacles. Patent landscapes and distribution network access further complicate market entry for new participants.

## **Market Opportunities and Challenges**

**Opportunities:** Expanding regulatory mandates globally create substantial growth opportunities for R-1234ze adoption. The European F-Gas regulation phase-down schedule and similar initiatives in other regions generate predictable demand growth. Technological advancement in heat pump applications and growing data center cooling requirements offer new market segments for penetration.

Industrial decarbonization initiatives and corporate sustainability commitments drive additional demand growth beyond regulatory requirements. The compound's potential applications in emerging technologies such as battery thermal management and pharmaceutical cold chain logistics present unexplored market opportunities.

Manufacturing capacity expansion in cost-competitive regions enables broader market access and improved price competitiveness. Strategic partnerships between technology developers and regional manufacturers can accelerate market penetration in emerging economies.

**Challenges:** Intense price competition from expanding manufacturing capacity may pressure profit margins across the value chain. Technical challenges related to equipment compatibility and performance optimization require ongoing investment in research and development.

Regulatory uncertainty in some markets creates planning difficulties for both manufacturers and end-users. Potential development of superior alternative technologies poses long-term competitive threats to R-1234ze market position.

Supply chain complexity and raw material availability constraints may limit production scaling capabilities. Environmental compliance costs and evolving safety regulations require continuous operational adjustments and capital investments.

Market education requirements for new applications and retrofitting existing systems create adoption barriers that require sustained technical support and marketing investments.

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