

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

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Abstracts

R-1234ze Refrigerant Market Summary

Introduction

R-1234ze is an HFO refrigerant used in commercial refrigeration and air conditioning systems, valued for its ultra-low GWP and high energy efficiency. The market emphasizes environmental sustainability, compatibility, and performance, driven by demand for green cooling solutions in commercial applications. It serves industries seeking low-impact refrigerants, reflecting a sector shaped by climate regulations and technological advancements. Key drivers include rising commercial refrigeration needs, HVAC system upgrades, and innovations in refrigerant synthesis.

Market Size and Growth Forecast

The global R-1234ze refrigerant market is estimated at USD 200 to 300 million in 2025, with a CAGR of 6.0% to 7.0% from 2025 to 2030, fueled by commercial cooling demand.

Regional Analysis

North America: Holds 30-35% market share, with a growth rate of 5-6%. Growth is driven by air conditioning, with the United States leading in HVAC and Canada focusing on refrigeration.

Europe: Accounts for 25-30% market share, with a growth rate of 5-6%. Demand from Germany and the UK supports stability, driven by green building trends.

Asia Pacific: Represents 25-30% market share, with a growth rate of 7-8%. China and Japan drive growth with refrigeration production.

Rest of the World: Holds 10-15% market share, growing at 6-7%, with Brazil leading due to commercial needs.

Trends in Europe focus on sustainability, while Asia Pacific emphasizes scale.

Application Analysis

Commercial refrigeration grows at 6-7%, driven by cold storage needs, with trends toward R-1234ze in supermarket systems enhancing efficiency. Air conditioning systems grow at 5-6%, fueled by commercial HVAC upgrades, with trends toward use in chillers and heat pumps.

Key Market Players

Chemours: Chemours offers R-1234ze for refrigeration. Known for its sustainable, high-performance refrigerants, it serves global markets.

Honeywell: Honeywell provides R-1234ze for air conditioning. It excels in delivering innovative, eco-friendly solutions worldwide.

These companies compete on efficiency, compliance, and cost, driving the market through innovation.

Porter's Five Forces Analysis

The threat of new entrants is moderate due to technical barriers. Substitutes are medium, with other HFOs competing. Buyer power is medium, with commercial users negotiating. Supplier power is high due to limited producers. Rivalry is high, pushing performance and cost efficiency.

Market Opportunities and Challenges

Opportunities

Rising commercial cooling demand boosting R-1234ze use.

Advancements in refrigerant technology.

Expansion into emerging green building markets.

Challenges

High production costs limiting adoption.

Compatibility issues with older systems.

Market saturation in regulated regions requiring innovation.

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