

Refrigerant Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Refrigerant Market Summary

Introduction

Refrigerants are substances used in cooling systems to absorb and release heat, vital for air conditioning, refrigeration, and industrial processes. The market is characterized by its diversity (HCFCs, HFCs, HFOs), regulatory evolution, and focus on energy efficiency. Key drivers include urbanization, food preservation needs, and environmental mandates, with trends shifting toward low-GWP (Global Warming Potential) refrigerants like HFOs and natural alternatives.

Market Size and Growth Forecast

The global Refrigerant market was valued at USD 7.3 billion to USD 9.8 billion in 2024, with an estimated CAGR of 6.0% to 8.0% from 2025 to 2030, driven by regulatory changes and cooling demand.

Regional Analysis

North America grows at 5.5-7.5%, with the USA leading due to regulatory transitions; trends focus on A2L adoption.

Europe achieves a growth rate of 6.0-8.0%, driven by Germany; trends emphasize low-GWP solutions.

Asia Pacific sees a growth rate of 6.5-8.5%, led by China and India; trends highlight urbanization-driven demand.

The Rest of the World records a growth rate of 5.0-7.0%, with Brazil emerging; trends focus on food processing needs.

Application Analysis

Home Air Conditioners and Heat Pumps expand at 6.5-8.5%; they cool residences, with trends favoring energy efficiency.

Appliances grow at 5.5-7.5%; they preserve food, with trends shifting to HFOs.

Automotive rises at 6.0-8.0%; it cools vehicles, with trends focusing on lightweight systems.

Food Processing expands at 5.5-7.5%; it ensures quality, with trends emphasizing cold chain growth.

Commercial Refrigeration grows at 6.0-8.0%; it supports retail, with trends favoring low-GWP refrigerants.

Industrial Refrigeration rises at 5.0-7.0%; it cools processes, with trends focusing on scalability.

Others expand at 5.0-7.0%; they include niche uses, with trends favoring sustainable options.

Type Analysis

HCFCs grow at 2.0-4.0%; they face phase-out, with trends shifting to replacements.

HFCs expand at 4.0-6.0%; they dominate legacy systems, with trends declining due to regulations.

HFOs rise at 8.0-10.0%; they offer low-GWP, with trends driving rapid adoption.

Key Market Players

Chemours, from Wilmington, USA, leads in fluorochemicals, offering refrigerants like HFOs for air conditioning.

Honeywell, based in Charlotte, USA, specializes in advanced refrigerants, crafting HFO blends for appliances.

Daikin, from Osaka, Japan, excels in cooling, producing refrigerants for automotive and commercial use.

Central Glass, headquartered in Tokyo, Japan, focuses on chemicals, offering refrigerants for industrial applications.

Arkema, from Colombes, France, provides specialty chemicals, crafting low-GWP refrigerants for food processing.

Foosung Co. Ltd., based in Seoul, South Korea, specializes in fluorochemicals, offering refrigerants for commercial use.

Koura, from San Luis Potosí, Mexico, focuses on fluorine products, producing refrigerants for diverse applications.

Porter's Five Forces Analysis

The threat of new entrants is moderate; high R&D costs deter entry, but demand lowers barriers.

The threat of substitutes is high; natural refrigerants challenge synthetic options.

Buyer power is moderate; efficiency drives demand, though regulations influence choice.

Supplier power is moderate; specialized production creates dependency.

Competitive rivalry is high; firms innovate with low-GWP solutions.

Market Opportunities and Challenges

Opportunities

Regulatory shifts boost HFO adoption.

Urbanization drives cooling demand.

Food cold chain growth expands market scope.

Challenges

High costs of new refrigerants limit uptake.

Regulatory complexity varies by region.

Legacy system compatibility poses hurdles.

Merger and Acquisition News

A-Gas Expands Capabilities in Canada through Acquisition of Refrigerant Services Inc. (Date: September 2024): This enhances A-Gas's refrigerant recycling for industrial use.

Hudson Technologies Acquires USA Refrigerants for \$20.7M (Date: October 2024): This strengthens Hudson's supply for commercial refrigeration.

The Arcticom Group Enters Major New Market with Acquisition of Midwest Refrigeration (Date: August 2024): This boosts Arcticom's refrigerant solutions for food processing.

Growth Trend Analysis

The EPA's 2025 A2L transition deadline reflects a trend toward low-GWP refrigerants, supporting a projected CAGR of 6.0-8.0% through 2030, driven by regulatory and cooling needs.

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