

# Global Next Generation Refrigerants Market, By Type (Natural Refrigerants, Hydrofluoro Olefins & Others) By Application (Air Conditioning, Refrigeration, Heat Pump & Others), By End-Use (Residential, Industrial, Commercial & Transportation), By Region, Competition, Forecast & Opportunities, 2024

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## Abstracts

Global next generation refrigerants market is projected to witness a CAGR of 9.5% during forecast period and is expected to reach \$ 4.51 billion during forecast period. A refrigerant is a substance or mixture, usually a fluid, used in a heat pump and refrigeration cycle. In most cycles, it undergoes phase transitions from a liquid to a gas and back again. Notably, rapid increase in the demand for air conditioners, heat pumps and refrigeration among others, is providing immense opportunities for the market to prosper further. Next generation refrigeration industry is at the peak of technological advancement and is anticipated to further expand its application areas. Global next generation refrigerants market is fueled by strict regulatory environment and growing consumer awareness, owing to which many industries are moving towards products with minimal impact on the environment. However, the existing conventional refrigerants, including R22, R32, R134a, R544, among others, have high global warming potential and ozone depletion potential. However, the next generation refrigerants, such as Ammonia (R-717), 1,3,3,3-Tetrafluoropropene (R-1234ze), and 2,3,3,3-Tetrafluoropropene (R-1234yf), among others have minimal to zero global warming potential (GWP) and ozone depletion potential (ODP). The demand for next generation refrigerants is increasing rapidly, owing to the growing preference for production procedures which are less harmful for the environment. Natural refrigerant and Hydrofluoro olefins (HFO) are the two types of next generation refrigerants with zero-ozone depletion potential (ODP) and global warming potential (GWP).

Natural refrigerants are naturally occurring and non-synthetic substances that can be used as cooling agents in both air-conditioners and refrigerators. These substances include hydrocarbons such as butane, propane and cyclopentane, ammonia, CO<sub>2</sub>, water, and air. These natural refrigerants have negligible or zero ozone depletion potential (ODP) thereby, lowering the impact on global warming. A few natural refrigerants include carbon dioxide (R-744), ammonia (R-717), and hydrocarbon refrigerants such as propane (R-290), isobutane (R-600a), and others.

Regionally, global next generation refrigerants market has been segmented into North America, South America, Europe, Asia-Pacific and Middle East & Africa. Among regions, Europe dominated global next generation refrigerants market in 2018 with 36.8% share on account of increasing government initiatives which include F-Gas regulation against HCFCs and HFCs, which resulted in rise in demand for natural refrigerants and HFO in the region. Furthermore, commercial supermarkets have largely taken over the usage of carbon dioxide as a refrigerant in refrigeration and air conditioning systems, which is further anticipated to increase the demand for natural refrigerants in the region.

Some of the key players operating in global next generation refrigerants market include, AGC Inc., Arkema SA, ASPEN Refrigerants, Inc., Daikin Industries, Ltd., Harp International Ltd., Honeywell International Inc., SRF Limited, Tazzetti S.p.A, The Chemours Company, The Linde Group, among others.

Years considered for this report:

Historical Years: 2014-2017

Base Year: 2018

Estimated Year: 2019

Forecast Period: 2020-2024

Objective of the Study:

To analyze and forecast global next generation refrigerants market size.

To forecast global next generation refrigerants market based on type, application, end user and regional distribution.

To identify drivers and challenges for global next generation refrigerants market.

To examine competitive developments such as expansions, new product launches, mergers & acquisitions, etc., in global next generation refrigerants market.

To conduct pricing analysis for next generation refrigerants market.

To identify and analyze the profile of leading players involved in the manufacturing of next generation refrigerants.

Some of the leading players in global next generation refrigerants market are AGC Inc., Arkema SA, ASPEN Refrigerants, Inc., Daikin Industries, Ltd., Harp International Ltd., Honeywell International Inc., SRF Limited, Tazzetti S.p.A, The Chemours Company, The Linde Group, among others.

TechSci Research performed both primary as well as exhaustive secondary research for this study. Initially, TechSci Research sourced a list of leading manufacturers across the globe. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents were also enquired about their competitors. Through this technique, TechSci Research could include the manufacturers which could not be identified due to the limitations of secondary research. TechSci Research analyzed the product offerings, distribution channels and presence of all major players operating in global next generation refrigerants market.

TechSci Research calculated global next generation refrigerants market size using a top-down approach, wherein data for various end-user segments was recorded and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated through analyzing historical data of these product types and applications for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

Next generation refrigerants manufacturers and suppliers

Government and other regulatory bodies

Organizations, forums and alliances related to next generation refrigerants

Market research and consulting firms

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as manufacturers and partners, end users, etc., besides allowing them in strategizing investments and capitalizing on market opportunities.

Report Scope:

In this report, global next generation refrigerants market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

Market, By Type:

Natural Refrigerants (CO<sub>2</sub>(R-744), NH<sub>3</sub> (R-717))

Hydrofluoroolefins (HFOs)

Others

Market, By Application:

Refrigeration

Air Conditioning

Heat Pump

Others

Market, By End-User:

Residential

Commercial

Industrial

Transportation

Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

Russia

United Kingdom

France

Italy

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Saudi Arabia

South Africa

UAE

Qatar

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in global next generation refrigerants market.

## Available Customizations:

With the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Profit Margin Analysis

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- 2.Arkema SA
- 3.ASPEN Refrigerants, Inc.

4. Daikin Industries, Ltd.
5. Harp International Ltd.
6. Honeywell International Inc.
7. SRF Limited
8. Tazzetti S.p.A
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