

Natural Refrigerants Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Carbon Dioxide, Ammonia, Hydrocarbons, Others), By Application (Industrial, Commercial, Domestic), By Region, and Competition

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Abstracts

Global Natural Refrigerants market is anticipated to grow at 3.05% CAGR and reach approximately USD 1619.79 million in 2028 due to the growing awareness of global warming and ozone layer depletion. In 2022, according to World Meteorological Organization (WMO), the global mean temperature was estimated to be about 1.15 [1.02 to 1.28] °C above the pre-industrial average.

Currently, conventional refrigerants have a strong potential to cause global warming and ozone depletion, including R407A, R410A R134a, and R544. Growing concern about global warming and other environmental issues are the major factors driving the global natural refrigerant market growth. Natural refrigerants are produced through a biochemical process that utilizes natural resources. The best prevalent natural refrigerants used in HVAC/R applications are carbon dioxide (CO₂, R-744), hydrocarbons such as propane (R-290), isobutene (R-600a), and propylene (R-1270), and ammonia (NH₃, R-717) whereas other natural refrigerants are water (H₂O, R-718) and air (R-729). They are regarded as the sole remedy for the environmental harm caused by synthetic refrigerants since they have very low or no global warming potential (GWP) and zero ozone depletion potential (ODP). Due to these benefits, the demand for natural refrigerants will increase in the upcoming years.

Furthermore, different manufacturers have increased their R&D investments and formulated new environment-friendly refrigerants to meet the standards imposed by the government, which enhance the market during the forecast period.

Increasing awareness regarding Eco-Friendly Refrigerants

In both developing and developed countries, the utilization of synthetic refrigerants such as hydrofluorocarbons (HFCs), hydrochlorofluorocarbons (HCFCs), and chlorofluorocarbons (CFCs) in the HVAC sector result in generating harmful gases which result in depletion of the ozone layer and increasing the temperature of the environment. The increase in the earth's temperature generates many problems like the melting of glaciers, due to which the water level is increased in the ocean leading to flooding in many areas, burning of forests, and deforestation, which effect the climate cycle. To overcome this problem, many government and non-government organizations started focusing and are taking initiatives to control the earth's surface temperature by starting awareness programs & training regarding natural refrigerant technologies along with the utilization of environment-friendly refrigerants as a replacement for synthetic refrigerants.

For instance, North American Sustainable Refrigeration Council (NASRC) is hosting its first-ever Natural Refrigerant Training Summit in Irwindale, California, from April 4-6, 2023.

Many companies have launched new environment-friendly refrigerants with the assistance of the government to lessen the total carbon footprint and release of harmful gases. Eco-friendly refrigerants or natural refrigerants, such as ammonia, carbon dioxide, and hydrocarbons, make no or only a small contribution to global warming as compared with synthetic refrigerants. Natural refrigerants are considered one of the most effective ways to permanently reduce greenhouse gas emissions, as well as cost-effective climate mitigation strategies.

For instance, according to UN Environment Programme, Cambodia developed National Cooling Action Plan in 2023 to reduce cooling demand, strengthen cold chains for food and medicine, improve the energy efficiency of appliances, and encourage the use of low-Global Warming Potential refrigerants.

Thus, increasing awareness regarding the utilization of natural refrigerants as a replacement for synthetic refrigerants will witness substantial growth in the Global Natural Refrigerants Market in the upcoming years.

Adoption of strict environmental regulations

Montreal Protocol is an international agreement that was made to stop the production and import of ozone-depleting substances and reduce their concentration in the atmosphere to help protect the earth's ozone layer.

For instance, according to the EPA (United States Environmental Protection Agency), Ozone-depleting substances (ODS) are classified as either class I or class II prohibited chemicals in the United States.

With a few exceptions, class I compounds have been phased out in the United States because of their increased potential to deplete the ozone layer. As a result, no one is allowed to produce or import class I substances. Hydrochlorofluorocarbons (HCFCs), a transitional replacement for several class I compounds, are all considered class II substances. But these substances also deplete the ozone layer and have high global warming potential. Therefore, to overcome this, a Kigali amendment to the Montreal Protocol was agreed upon globally in 2016, in which many countries had already established regulations, policies, and incentive structures to phase down the use of high-GWP refrigerant gases. Thus, the policies are prepared to reduce the use of synthetic refrigerants. Broadly, the policies in developed countries can be classified into two types - regulatory limits based on the GWP of the refrigerant and incentive structures for the uptake of low-GWP refrigerants.

For instance, according to U.S. Environmental Protection Agency, in 2020, a complete ban on the production and import of HCFC-22 and HCFC-142b, and by 2030 ban on the remaining production and import of all HCFCs.

Thus, rising strict environmental regulations regarding the production and import of synthetic refrigerants result in an increasing demand for natural refrigerants, which will lead to the growth of Global Natural Refrigerants market in the projected years.

High Potential of Natural Refrigerants

Natural refrigerants, such as carbon dioxide (CO₂), ammonia (NH₃), and hydrocarbons (HCs), are known for their high energy efficiency when used as refrigerants. This is because they have favorable thermodynamic properties, such as low global warming potential (GWP), low ozone depletion potential (ODP), and high latent heat of vaporization, which allows them to absorb and release large amounts of heat during the refrigeration cycle. Compared to synthetic refrigerants, natural refrigerants have higher thermal conductivity, which allows them to transfer heat more efficiently. This means that they can achieve the same cooling effect with less energy consumption, resulting in

lower operating costs and reduced carbon emissions. Additionally, natural refrigerants have a higher volumetric cooling capacity, which means that they require less refrigerant volume for the same cooling effect, resulting in lower installation and maintenance costs. Moreover, natural refrigerants have the potential to significantly improve the energy efficiency and sustainability of refrigeration systems and are increasingly being used as alternatives to synthetic refrigerants in various applications. Therefore, all these factors raise the demand for natural refrigerants in the forecast periods.

CO2 will Continue to Be a Key Type

Due to its widespread usage in commercial applications and simplicity of handling, carbon dioxide is predicted to account for a sizeable portion of the worldwide market for natural refrigerants. Due to its high heat exchange, low pumping power, and capacity to perform at reduced condensing pressure during the winter season, Carbon Dioxide (CO₂) has a Global Warming Potential (GWP) of 1 and zero Ozone Depletion Potential (ODP), among the most efficient refrigerants. Thus, all such factors and trends are expected to drive the demand for natural refrigerants in the upcoming years.

For instance, KOMA uses CO₂ as refrigerants in various applications like chilling, freezing, etc.

However, the limited availability of natural refrigerants, as compared to synthetic refrigerants, due to fewer production plants across the world results in restraining the growth of the market. Moreover, natural refrigerants include hydrocarbons which are flammable, and proper safety precautions are implemented during their utilization which further requires extra costing for installation, which became a challenge for this market. The limited availability, batch supply, and high demand for natural refrigerants as well as high investment in research and development for a new application, cause the rise in the cost of products which further cause restraint the market growth.

Recent Developments

In December 2022, A-Gas' new separators will be operational in early 2023 and will be more than double the separation capacity at the current site- addressing a critical need highlighted by the NGO report.

In January 2022, Honeywell launched a new non-flammable energy-efficient Solstice N71 (R-471A) refrigerant to meet the stringent regulations regarding

reducing greenhouse gas emissions.

In April 2021, TEGA GmbH acquired the Austrian refrigerants business of Linde. With this acquisition, TEGA is aimed to form a closer relationship with Austrian natural refrigerants consumers.

In February 2020, The Chemours Company announced the successful installation of the Opteon refrigerant at the Pepsi Center, home of the Colorado Avalanche.

Market Segmentation

Global Natural Refrigerants Market is segmented based on type, application, and region. Based on the type, the market is categorized into carbon dioxide, ammonia, hydrocarbons, and others. Based on application, the market is segmented into industrial, commercial, and domestic. Based on region, the market is divided into Europe, North America, Asia-Pacific, South America, Middle East & Africa, By Company.

Company Profiles

Emerson Electric Co., Linde Plc, Air Gas Inc., Evonik Industries AG, Secop Group Holding GmbH, Natural Refrigerants Company, HyChill Australia Pty Ltd, Tazzetti SPA, A-Gas International Ltd, Puyang Zhongwei Fine Chemical Co. Ltd., are some of the key players of Global Natural Refrigerants Market.

Report Scope:

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

Natural Refrigerants Market, By Type:

Carbon Dioxide

Ammonia

Hydrocarbons

Others

Natural Refrigerants Market, By Application:

Industrial

Commercial

Domestic

Natural Refrigerants Market, By Region:

Europe

Germany

Italy

France

United Kingdom

Spain

Russia

North America

United States

Canada

Mexico

Asia-Pacific

China

Japan

Australia

South Korea

India

Vietnam

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive landscape

Company Profiles: Detailed analysis of the major companies in the global natural 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).

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