

Global Multiple-Element Gas Container Market - A Global and Regional Analysis: Focus on Application, Product Type, and Country-Level Analysis - Analysis and Forecast, 2023-2033

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Abstracts

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Introduction of Multiple-Element Gas Container

Multiple-element gas containers mark a significant step forward in gas storage and transportation, signaling a transition away from traditional single-element systems. These revolutionary containers are designed to hold many types of gases at once, at varied pressure and temperature settings, in separate portions, or using advanced molecular separation processes. This multidimensional capacity is especially useful in areas where space optimization and gas purity are critical, such as aerospace, medical, and specialized gas sectors. The emergence of these containers not only demonstrates scientific brilliance in material science and chemical engineering but also lays the way for more sustainable and efficient gas storage and use techniques in a wide range of sectors.

Market Introduction

Multiple-element gas containers (MEGCs) marked a huge technological breakthrough in gas transportation safety and efficiency when they were first introduced. Initially, the technology underlying MEGCs was motivated by the need to improve on the constraints of typical single gas cylinders, providing more capacity and safety via a combination of linked cylinders or parts within a rigid frame. This breakthrough enabled the bulk transfer of gases, lowering handling hazards and increasing operating efficiency.

However, the market's first adoption phase encountered significant problems, including regulatory compliance issues, because uniform safety standards for these revolutionary devices had yet to be created. Furthermore, the high initial expenses of manufacturing and testing MEGCs hampered wider use. Despite these problems, the advent of MEGCs significantly changed the industry by establishing new standards for gas storage and transportation safety, paving the path for today's advanced gas logistics solutions.

The multiple-element gas container market has evolved significantly in recent years owing to technological and material science developments. Modern gas canisters are not only more efficient and safer but also suitable for a wide range of industrial and medicinal uses. The most recent versions utilize cutting-edge materials such as carbon fiber composites, which have high strength-to-weight ratios and are resistant to corrosion. This invention greatly lowers the chance of leakage and structural failure, resulting in improved safety requirements. Furthermore, the incorporation of modern valve technology and real-time monitoring systems enables accurate control and monitoring of gas flow, pressure, and composition, hence improving the operating efficiency and safety of these containers. Today's multiple-element gas containers are developed with flexibility and scalability in mind, making them suitable for a wide range of applications and capable of holding gases at varying pressures and temperatures. This versatility, along with stringent safety regulations and ongoing technical improvements, highlights the ever-changing character of multiple-element gas container development and its critical role in modern industrial and healthcare sectors.

Industrial Impact

The introduction of multiple-element gas containers (MEGCs) has profoundly altered industrial processes, particularly in industries that rely on the safe and efficient transportation of gases. These composite structures, which can house a variety of gases under high pressure, have significantly improved storage capacity, safety, and transportation efficiency. MEGCs have provided significant benefits to industries such as the medical, pharmaceutical, and chemical industries. For instance, in the pharmaceutical industry, the ability to transport multiple gases in a single container has streamlined manufacturing processes, ensuring a steady supply of essential gases such as nitrogen, oxygen, and carbon dioxide, which are required for various production and preservation processes. MEGCs' intrinsic design, emphasizing durability and leak avoidance, has significantly decreased the danger of gas-related mishaps, thereby boosting workplace safety and compliance with severe industrial norms.

MEGCs have transformed the economics of gas transportation. These containers' modular design enables modification based on unique transport requirements, maximizing space usage and lowering shipping costs. This is especially visible in the energy industry, where transporting natural gas and hydrogen has historically been difficult. MEGCs have emerged as a feasible alternative for long-distance gas transportation, allowing for the growth of energy networks and helping the transition to greener energy sources. Furthermore, the use of new materials and technology in MEGC manufacture has resulted in lighter but stronger containers, boosting fuel economy and lowering transportation's carbon impact. As companies prioritize sustainability and operational efficiency, the role of MEGCs will become increasingly important in generating innovation and supporting global industrial breakthroughs.

Market Segmentation:

Segmentation 1: by Application

Natural Gas

Hydrogen

Industrial Gases

Natural Gas Segment to Dominate the Global Multiple-Element Gas Container Market (by Application)

The multiple-element gas container market is led by the natural gas segment, with an 82.79% share in 2022 in terms of revenue. MEGCs are becoming an increasingly important component of gas-to-power systems as a result of the current trend toward decentralized power production. In early 2023, projects in areas with poor electrical grid infrastructure began to use MEGCs to provide natural gas to mobile and modular power production units. This use is especially useful for businesses that require consistent power for short-term operations, such as mining and construction, allowing them to use cleaner-burning natural gas instead of diesel or other fuels.

Segmentation 2: by Type

20 Ft

40 Ft and Above

20 Ft Segment to Witness the Highest Growth between 2023 and 2033

The 20 Ft segment dominated the global multiple-element gas container market (by type) in 2022, with an 80.78% share in terms of revenue due to the need to be integrated into various platforms to carry out the tasks.

Segmentation 3: by Region

North America - U.S., Canada, and Mexico

Europe - U.K., Germany, France, Italy, and Rest-of-Europe

Asia-Pacific - Japan, India, China, Australia, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World - Brazil, U.A.E., Other

Europe multiple-element gas container market was the highest-growing market among all the regions, registering a CAGR of 9.11%. North America is anticipated to gain traction in terms of multiple-element gas container adoption owing to the technological advancements in material sciences in the region. Moreover, the shift toward renewable energy and hydrogen economy is also expected to support the growth of the multiple-element gas container market in North America and Europe during the forecast period.

In Europe, Germany is anticipated to show the highest growth in the multiple-element gas container market among other countries in the region, growing at a CAGR of 10.06%. The growth of Germany in the multiple-element gas container market is mainly due to the factor that there is a significant movement toward environment-friendly gas containers and systems that provide increased energy efficiency and lower emissions.

Recent Developments in the Multiple-Element Gas Container Market

In September 2023, Luxfer Gas Cylinders' European hub in Nottingham received a more than \$1.24 million (?1 million) investment, establishing a new production facility to enable 'virtual' gas pipes capable of distributing hydrogen

throughout the U.K. and Europe.

In January 2023, Arkema, a multinational specialty materials manufacturer, awarded FIBA Technologies a contract to deliver 16 multi-element gas containers (MEGCs) for the transportation of boron trifluoride (BF₃) across Europe. FIBA started supplying the 12-tube, 20-foot MEGCs to Arkema in early July.

In May 2022, Hexagon Agility, a Hexagon Composites subsidiary, received a new \$14.8 million order from Xpress Natural Gas LLC (XNG), a leading full-service compressed natural gas (CNG) supplier in the U.S., to provide Mobile Pipeline modules to transport clean and renewable natural gas (RNG).

Demand – Drivers, Restraints, and Opportunities

Market Demand Drivers: Increasing Demand for Industrial Gases

The global industrial environment is seeing an increase in demand for industrial gases from a variety of industries, including manufacturing, healthcare, and energy. This growing need is a significant business driver for players in the multiple-element gas container (MEGC) industry. MEGCs, which are well-known for their ability to store and transfer industrial gases at high pressure, are critical components of these sectors' supply chains, thereby supporting the growth of the multiple-element gas container market.

Market Restraints: High Initial Investment and Maintenance Costs

Multiple-element gas containers (MEGCs) are manufactured using sophisticated materials and technologies, such as carbon fiber composites for lightweighting and automated welding for increased safety. These materials and procedures are expensive, requiring large initial investments for enterprises entering the market or wishing to expand operations.

Market Opportunities: Digitalization and Smart Container Solutions

Digitalization facilitates the integration of sensors and IoT devices into MEGCs, allowing for real-time monitoring of gas pressure, temperature, and volume. This not only ensures the safety and integrity of the gas canisters but also allows for predictive

maintenance. Hexagon Composites, in partnership with digital solution suppliers, has been incorporating smart technology into gas containers. In 2022, they developed a series of smart MEGCs outfitted with sensors that offer real-time data on gas levels, location, and ambient conditions, allowing for more effective inventory management and logistical planning.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of MEGC available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the multiple-element gas container market by application on the basis of application (natural gas, hydrogen, and industrial gases) and product on the basis type (20 Ft and 40 Ft and above).

Growth/Marketing Strategy: The multiple-element gas container market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnerships and contracts to strengthen their position in the multiple-element gas container market. For instance, in July 2022, Luxfer Gas Cylinders signed a multi-million-pound agreement with Octopus Hydrogen to deliver bulk gas transport modules that would transport green hydrogen across the U.K. According to the deal, Luxfer Gas Cylinders supplied the Octopus Energy subsidiary with 40-foot-long multiple-element gas containers (MEGC) capable of transporting 1.1 tonnes of hydrogen from the electrolyzer plant to the site of usage.

Competitive Strategy: Key players in the multiple-element gas container market analyzed and profiled in the study involve major multiple-element gas container offering companies providing multiple-element gas containers for the purpose. Moreover, a detailed competitive benchmarking of the players operating in the multiple-element gas container market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this multiple-element gas container market study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been done to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, will be extracted for each company from secondary sources and databases. Revenues specific to product/service/technology will then be estimated for each market player based on fact-based proxy indicators as well as primary inputs.

Based on the classification, the average selling price (ASP) is calculated using the weighted average method.

The currency conversion rate has been taken from the historical exchange rate of Oanda and/or other relevant websites.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The term “product” in this document may refer to “platform” as and where relevant.

The term “manufacturers/suppliers” may refer to “systems providers” or “technology providers” as and where relevant.

Primary Research

The primary sources involve industry experts from the aerospace and defense industry, including multiple-element gas containers, agriculture/farming-related industries, and multiple-element gas container component manufacturers. Respondents such as CEOs,

vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as Spacenews, Businessweek, and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as www.nasa.gov.

Secondary research was done to obtain critical information about the industry's value chain, the market's monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights gathered from primary experts.

The multiple-element gas container market comprises key players who have established themselves thoroughly and have the proper understanding of the market, accompanied by start-ups who are looking forward to establishing themselves in this highly competitive market. In 2022, the multiple-element gas container market was dominated by established players, accounting for 85% of the market share, whereas start-ups managed to capture 15% of the market. With the growth in advancements in agricultural technologies among the nations, more players will enter the global multiple-element gas container market with each passing year.

Some prominent names established in the multiple-element gas container market are:

Hexagon Composites ASA

Worthington Enterprises, Inc.

FIBA Technologies, Inc.

Luxfer Gas Cylinders

Koyuncu Gas and Gas Equipment

Gaznet O?

Quantum Fuel Systems LLC.

Faber Industrie SPA

Beijing Tianhai Industry Co., Ltd.

McPhy Energy

Linde plc

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