

Global Air Separation Plant Market Size study, by Process (Cryogenic, Non-cryogenic) by Gas (Nitrogen, Oxygen, Argon, Others) by End-use (Iron & steel, Oil & Gas, Chemical, Healthcare, Others) and Regional Forecasts 2022-2032

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Abstracts

Global Air Separation Plant Market is valued approximately USD 6.05 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 4.60% over the forecast period 2024-2032. An Air Separation Plant (ASP) is a facility used for the separation of atmospheric air into its primary components, primarily nitrogen, oxygen, and argon. The process typically involves cryogenic distillation, where air is cooled and compressed to very low temperatures, causing its components to liquefy at different points. These liquefied components are then separated through distillation processes. Moreover, modular Air Separation Plant which are pre-engineered and fabricated off-site in modules or skids, are gaining popularity due to their faster installation, scalability, and cost-effectiveness compared to traditional stick-built plants. This trend is particularly significant in industries where rapid deployment and flexibility are essential.

Moreover, the primary driver of the Air Separation Plant market is the growing demand for industrial gases such as oxygen, nitrogen, and argon across various industries. These gases are essential for a wide range of applications including manufacturing, healthcare, metallurgy, chemicals, electronics, and food processing. Additionally, other factors support the market growth are expanding healthcare sector, growing demand for high-purity gases, rising investments in infrastructure development projects such as manufacturing facilities, power plants, and transportation networks, and growing industrialization & urbanization. However, the high cost associated with fabrication and operation are expected to hinder the market growth during the forecast period 2024-2032.

The key regions considered for the global Air Separation Plant market study includes Asia Pacific, North America, Europe, Latin America, and Rest of the World. In 2023, the Asia Pacific region emerged as the dominant force in the global Air Separation Plant market, boasting the largest revenue share. This was largely driven by the region's pivotal role as a center for electronics and semiconductor manufacturing. These industries have a critical need for ultra-pure gases such as nitrogen, crucially produced by air separation plants, to facilitate a wide range of manufacturing processes. Also, APAC is home to rapidly developing economies and industries, particularly in countries like China, India, Japan, South Korea, and Taiwan. These countries have substantial demand for industrial gases due to their manufacturing prowess and large populations. Expanding ASU plants enable suppliers to meet the regional demand effectively and efficiently. For instance, in January 2022, Air Liquide unveiled plans to invest approximately INR 350 crore in a cutting-edge air separation unit tailored for industrial merchant activities in Kosi, Uttar Pradesh, India. This state-of-the-art facility will boast a robust production capacity of 350 tons per day, with a remarkable maximum output of 300 tons of oxygen. Anticipated to commence operations by year's end, this plant signifies a significant stride towards bolstering industrial gas supply and meeting burgeoning demand in the region.

Major market player included in this report are:

Air Liquide S.A.

Linde AG

Messer Group GmbH

Air Products and Chemicals, Inc.

E Taiyo Nippon Sanso Corporation

Praxair, Inc.

Oxyplants India Private Limited

AMCS Corporation

Enerflex Ltd

Technex Ltd.

The detailed segments and sub-segment of the market are explained below:

By Process

Cryogenic

Non-cryogenic

By Gas

Nitrogen

Oxygen
Argon
Others

By End-use
Iron & steel
Oil & Gas
Chemical
Healthcare
Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

RoMEA

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market

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