

Global Dilution Refrigerators Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dilution Refrigerators market size is expected to reach \$ 345 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

In 2025, global Dilution Refrigerators is 600 units, with production reached approximately 450 units, with an average global market price of around US\$458,000 per unit. The market gross margin is mainly 30%-40%.

Dilution Refrigerators (DRs) are ultra-low-temperature cryogenic systems capable of reaching millikelvin (mK) temperatures, typically below 10 mK, by exploiting the enthalpy of mixing between helium-3 and helium-4 isotopes. In the dilution process, helium-3 continuously migrates from a concentrated phase to a dilute phase, absorbing heat and providing cooling. Modern dilution refrigerators can operate in wet (liquid-helium-based) or dry/cryogen-free configurations using cryocoolers. They provide multiple temperature stages, high thermal stability, and long continuous operation, making them essential tools for quantum computing, low-temperature physics, and advanced materials research.

The dilution refrigerator industrial chain begins upstream with critical raw materials and components, most notably helium-3 and helium-4 isotopes, high-purity metals (copper, stainless steel, aluminum), vacuum materials, and cryogenic insulation. Core components include mixing chambers, stills, heat exchangers, circulation pumps, cryogenic valves, vacuum chambers, radiation shields, wiring harnesses, and sensors. For dry systems, pulse-tube or GM cryocoolers are a key upstream subsystem, often sourced from specialized cryocooler suppliers.

Midstream players are system integrators and OEM manufacturers that design and

assemble complete dilution refrigerator systems. Their value lies in thermal design, vibration control, gas handling and recovery systems, automation software, and reliability engineering. Customization?such as wiring density, cooling power at 10?100 mK, and compatibility with magnets or microwave components?is a major differentiator.

Downstream applications are concentrated in research institutes, national laboratories, universities, and increasingly industrial users. Key end users include quantum computing hardware developers, condensed-matter physics labs, and advanced materials researchers. After-sales services?installation, maintenance, helium recovery, upgrades, and long-term technical support?form an important part of the value chain and recurring revenue.

The global market for dilution refrigerators is entering a phase of accelerated growth, primarily driven by the rapid expansion of quantum computing. As quantum processors scale from tens to thousands of qubits, demand is rising for dilution refrigerators with higher cooling power, lower base temperatures, and the ability to support dense microwave and DC wiring. This shifts the market from small-volume scientific instruments toward semi-industrial, standardized platforms with higher unit values.

A second growth driver is the transition from wet systems to dry, cryogen-free dilution refrigerators. Concerns over helium supply security, operating cost, and ease of use are pushing both academic and industrial users toward dry systems, despite their higher upfront cost. This trend favors manufacturers with strong system integration and vibration-mitigation capabilities.

Beyond quantum computing, steady demand continues from low-temperature physics, superconductivity research, nanoelectronics, and emerging quantum sensing applications. While these segments grow more slowly, they provide a stable baseline market and often demand highly customized configurations.

From a regional perspective, North America and Europe remain the largest markets due to their concentration of quantum research and government funding. Asia-Pacific, particularly China, is expected to show the fastest growth, supported by national quantum programs and increasing domestic capabilities.

Looking ahead, the market will likely see higher competition, longer order backlogs, and closer collaboration between dilution refrigerator suppliers and quantum hardware companies. Technological differentiation will increasingly focus on scalability, reliability, automation, and lifecycle cost, positioning dilution refrigerators as critical infrastructure

rather than niche laboratory equipment.

This report studies the global Dilution Refrigerators production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dilution Refrigerators and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Dilution Refrigerators that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dilution Refrigerators total production and demand, 2021-2032, (Units)

Global Dilution Refrigerators total production value, 2021-2032, (USD Million)

Global Dilution Refrigerators production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Dilution Refrigerators consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Dilution Refrigerators domestic production, consumption, key domestic manufacturers and share

Global Dilution Refrigerators production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Dilution Refrigerators production by Base Temperature, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Dilution Refrigerators production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Dilution Refrigerators market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bluefors Oy, Oxford Instruments NanoScience, Leiden Cryogenics BV, Air Liquide(Cryoconcept), JanisULT, Taiyo Nippon Sanso, ULVAC CRYOGENICS INC, Quantum Design, ICEoxford, CETC 16th Research Institute, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Dilution Refrigerators market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Base Temperature, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Dilution Refrigerators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dilution Refrigerators Market, Segmentation by Base Temperature:

Base Temperature Below 10mK

Base Temperature Between 10-20mK

Base Temperature Above 20mK

Global Dilution Refrigerators Market, Segmentation by Liquid Nitrogen Replenishment:

Wet Dilution Refrigerator

Cryogen-Free Dilution Refrigerator

Global Dilution Refrigerators Market, Segmentation by End User:

R&D Type

Industrial Production Type

Global Dilution Refrigerators Market, Segmentation by Application:

Quantum Computing

Nano Research

Low Temperature Detection

Others

Companies Profiled:

Bluefors Oy

Oxford Instruments NanoScience

Leiden Cryogenics BV

Air Liquide(Cryoconcept)

JanisULT

Taiyo Nippon Sanso

ULVAC CRYOGENICS INC

Quantum Design

ICEoxford

CETC 16th Research Institute

ZLCryogenic

Beijing Physike Technology Co., Ltd.

Shanghai Boreas Cryogenics

Shanghai Liangxi Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Dilution Refrigerators market?
2. What is the demand of the global Dilution Refrigerators market?
3. What is the year over year growth of the global Dilution Refrigerators market?
4. What is the production and production value of the global Dilution Refrigerators market?
5. Who are the key producers in the global Dilution Refrigerators market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Dilution Refrigerators Introduction
- 1.2 World Dilution Refrigerators Supply & Forecast
 - 1.2.1 World Dilution Refrigerators Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Dilution Refrigerators Production (2021-2032)
 - 1.2.3 World Dilution Refrigerators Pricing Trends (2021-2032)
- 1.3 World Dilution Refrigerators Production by Region (Based on Production Site)
 - 1.3.1 World Dilution Refrigerators Production Value by Region (2021-2032)
 - 1.3.2 World Dilution Refrigerators Production by Region (2021-2032)
 - 1.3.3 World Dilution Refrigerators Average Price by Region (2021-2032)
 - 1.3.4 North America Dilution Refrigerators Production (2021-2032)
 - 1.3.5 Europe Dilution Refrigerators Production (2021-2032)
 - 1.3.6 China Dilution Refrigerators Production (2021-2032)
 - 1.3.7 Japan Dilution Refrigerators Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Dilution Refrigerators Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Dilution Refrigerators Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Dilution Refrigerators Demand (2021-2032)
- 2.2 World Dilution Refrigerators Consumption by Region
 - 2.2.1 World Dilution Refrigerators Consumption by Region (2021-2026)
 - 2.2.2 World Dilution Refrigerators Consumption Forecast by Region (2027-2032)
- 2.3 United States Dilution Refrigerators Consumption (2021-2032)
- 2.4 China Dilution Refrigerators Consumption (2021-2032)
- 2.5 Europe Dilution Refrigerators Consumption (2021-2032)
- 2.6 Japan Dilution Refrigerators Consumption (2021-2032)
- 2.7 South Korea Dilution Refrigerators Consumption (2021-2032)
- 2.8 ASEAN Dilution Refrigerators Consumption (2021-2032)
- 2.9 India Dilution Refrigerators Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Dilution Refrigerators Production Value by Manufacturer (2021-2026)

- 3.2 World Dilution Refrigerators Production by Manufacturer (2021-2026)
- 3.3 World Dilution Refrigerators Average Price by Manufacturer (2021-2026)
- 3.4 Dilution Refrigerators Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Dilution Refrigerators Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Dilution Refrigerators in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Dilution Refrigerators in 2025
- 3.6 Dilution Refrigerators Market: Overall Company Footprint Analysis
 - 3.6.1 Dilution Refrigerators Market: Region Footprint
 - 3.6.2 Dilution Refrigerators Market: Company Product Type Footprint
 - 3.6.3 Dilution Refrigerators Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Dilution Refrigerators Production Value Comparison
 - 4.1.1 United States VS China: Dilution Refrigerators Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Dilution Refrigerators Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Dilution Refrigerators Production Comparison
 - 4.2.1 United States VS China: Dilution Refrigerators Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Dilution Refrigerators Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Dilution Refrigerators Consumption Comparison
 - 4.3.1 United States VS China: Dilution Refrigerators Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Dilution Refrigerators Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Dilution Refrigerators Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Dilution Refrigerators Production Value (2021-2026)

4.4.3 United States Based Manufacturers Dilution Refrigerators Production (2021-2026)

4.5 China Based Dilution Refrigerators Manufacturers and Market Share

4.5.1 China Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Dilution Refrigerators Production Value (2021-2026)

4.5.3 China Based Manufacturers Dilution Refrigerators Production (2021-2026)

4.6 Rest of World Based Dilution Refrigerators Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Dilution Refrigerators Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Dilution Refrigerators Production (2021-2026)

5 MARKET ANALYSIS BY BASE TEMPERATURE

5.1 World Dilution Refrigerators Market Size Overview by Base Temperature: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Base Temperature

5.2.1 Base Temperature Below 10mK

5.2.2 Base Temperature Between 10-20mK

5.2.3 Base Temperature Above 20mK

5.3 Market Segment by Base Temperature

5.3.1 World Dilution Refrigerators Production by Base Temperature (2021-2032)

5.3.2 World Dilution Refrigerators Production Value by Base Temperature (2021-2032)

5.3.3 World Dilution Refrigerators Average Price by Base Temperature (2021-2032)

6 MARKET ANALYSIS BY LIQUID NITROGEN REPLENISHMENT

6.1 World Dilution Refrigerators Market Size Overview by Liquid Nitrogen Replenishment: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Liquid Nitrogen Replenishment

6.2.1 Wet Dilution Refrigerator

6.2.2 Cryogen-Free Dilution Refrigerator

6.3 Market Segment by Liquid Nitrogen Replenishment

6.3.1 World Dilution Refrigerators Production by Liquid Nitrogen Replenishment (2021-2032)

6.3.2 World Dilution Refrigerators Production Value by Liquid Nitrogen Replenishment (2021-2032)

6.3.3 World Dilution Refrigerators Average Price by Liquid Nitrogen Replenishment (2021-2032)

7 MARKET ANALYSIS BY END USER

7.1 World Dilution Refrigerators Market Size Overview by End User: 2021 VS 2025 VS 2032

7.2 Segment Introduction by End User

7.2.1 R&D Type

7.2.2 Industrial Production Type

7.3 Market Segment by End User

7.3.1 World Dilution Refrigerators Production by End User (2021-2032)

7.3.2 World Dilution Refrigerators Production Value by End User (2021-2032)

7.3.3 World Dilution Refrigerators Average Price by End User (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Dilution Refrigerators Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Quantum Computing

8.2.2 Nano Research

8.2.3 Low Temperature Detection

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Dilution Refrigerators Production by Application (2021-2032)

8.3.2 World Dilution Refrigerators Production Value by Application (2021-2032)

8.3.3 World Dilution Refrigerators Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Bluefors Oy

9.1.1 Bluefors Oy Details

9.1.2 Bluefors Oy Major Business

9.1.3 Bluefors Oy Dilution Refrigerators Product and Services

9.1.4 Bluefors Oy Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Bluefors Oy Recent Developments/Updates

9.1.6 Bluefors Oy Competitive Strengths & Weaknesses

9.2 Oxford Instruments NanoScience

9.2.1 Oxford Instruments NanoScience Details

9.2.2 Oxford Instruments NanoScience Major Business

9.2.3 Oxford Instruments NanoScience Dilution Refrigerators Product and Services

9.2.4 Oxford Instruments NanoScience Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Oxford Instruments NanoScience Recent Developments/Updates

9.2.6 Oxford Instruments NanoScience Competitive Strengths & Weaknesses

9.3 Leiden Cryogenics BV

9.3.1 Leiden Cryogenics BV Details

9.3.2 Leiden Cryogenics BV Major Business

9.3.3 Leiden Cryogenics BV Dilution Refrigerators Product and Services

9.3.4 Leiden Cryogenics BV Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Leiden Cryogenics BV Recent Developments/Updates

9.3.6 Leiden Cryogenics BV Competitive Strengths & Weaknesses

9.4 Air Liquide(Cryoconcept)

9.4.1 Air Liquide(Cryoconcept) Details

9.4.2 Air Liquide(Cryoconcept) Major Business

9.4.3 Air Liquide(Cryoconcept) Dilution Refrigerators Product and Services

9.4.4 Air Liquide(Cryoconcept) Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Air Liquide(Cryoconcept) Recent Developments/Updates

9.4.6 Air Liquide(Cryoconcept) Competitive Strengths & Weaknesses

9.5 JanisULT

9.5.1 JanisULT Details

9.5.2 JanisULT Major Business

9.5.3 JanisULT Dilution Refrigerators Product and Services

9.5.4 JanisULT Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 JanisULT Recent Developments/Updates

9.5.6 JanisULT Competitive Strengths & Weaknesses

9.6 Taiyo Nippon Sanso

9.6.1 Taiyo Nippon Sanso Details

9.6.2 Taiyo Nippon Sanso Major Business

- 9.6.3 Taiyo Nippon Sanso Dilution Refrigerators Product and Services
- 9.6.4 Taiyo Nippon Sanso Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Taiyo Nippon Sanso Recent Developments/Updates
- 9.6.6 Taiyo Nippon Sanso Competitive Strengths & Weaknesses
- 9.7 ULVAC CRYOGENICS INC
 - 9.7.1 ULVAC CRYOGENICS INC Details
 - 9.7.2 ULVAC CRYOGENICS INC Major Business
 - 9.7.3 ULVAC CRYOGENICS INC Dilution Refrigerators Product and Services
 - 9.7.4 ULVAC CRYOGENICS INC Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 ULVAC CRYOGENICS INC Recent Developments/Updates
 - 9.7.6 ULVAC CRYOGENICS INC Competitive Strengths & Weaknesses
- 9.8 Quantum Design
 - 9.8.1 Quantum Design Details
 - 9.8.2 Quantum Design Major Business
 - 9.8.3 Quantum Design Dilution Refrigerators Product and Services
 - 9.8.4 Quantum Design Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Quantum Design Recent Developments/Updates
 - 9.8.6 Quantum Design Competitive Strengths & Weaknesses
- 9.9 ICEoxford
 - 9.9.1 ICEoxford Details
 - 9.9.2 ICEoxford Major Business
 - 9.9.3 ICEoxford Dilution Refrigerators Product and Services
 - 9.9.4 ICEoxford Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 ICEoxford Recent Developments/Updates
 - 9.9.6 ICEoxford Competitive Strengths & Weaknesses
- 9.10 CETC 16th Research Institute
 - 9.10.1 CETC 16th Research Institute Details
 - 9.10.2 CETC 16th Research Institute Major Business
 - 9.10.3 CETC 16th Research Institute Dilution Refrigerators Product and Services
 - 9.10.4 CETC 16th Research Institute Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 CETC 16th Research Institute Recent Developments/Updates
 - 9.10.6 CETC 16th Research Institute Competitive Strengths & Weaknesses
- 9.11 ZLCryogenic
 - 9.11.1 ZLCryogenic Details

- 9.11.2 ZLCryogenic Major Business
- 9.11.3 ZLCryogenic Dilution Refrigerators Product and Services
- 9.11.4 ZLCryogenic Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 ZLCryogenic Recent Developments/Updates
- 9.11.6 ZLCryogenic Competitive Strengths & Weaknesses
- 9.12 Beijing Physike Technology Co., Ltd.
 - 9.12.1 Beijing Physike Technology Co., Ltd. Details
 - 9.12.2 Beijing Physike Technology Co., Ltd. Major Business
 - 9.12.3 Beijing Physike Technology Co., Ltd. Dilution Refrigerators Product and Services
 - 9.12.4 Beijing Physike Technology Co., Ltd. Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Beijing Physike Technology Co., Ltd. Recent Developments/Updates
 - 9.12.6 Beijing Physike Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.13 Shanghai Boreas Cryogenics
 - 9.13.1 Shanghai Boreas Cryogenics Details
 - 9.13.2 Shanghai Boreas Cryogenics Major Business
 - 9.13.3 Shanghai Boreas Cryogenics Dilution Refrigerators Product and Services
 - 9.13.4 Shanghai Boreas Cryogenics Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Shanghai Boreas Cryogenics Recent Developments/Updates
 - 9.13.6 Shanghai Boreas Cryogenics Competitive Strengths & Weaknesses
- 9.14 Shanghai Liangxi Technology Co., Ltd.
 - 9.14.1 Shanghai Liangxi Technology Co., Ltd. Details
 - 9.14.2 Shanghai Liangxi Technology Co., Ltd. Major Business
 - 9.14.3 Shanghai Liangxi Technology Co., Ltd. Dilution Refrigerators Product and Services
 - 9.14.4 Shanghai Liangxi Technology Co., Ltd. Dilution Refrigerators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Shanghai Liangxi Technology Co., Ltd. Recent Developments/Updates
 - 9.14.6 Shanghai Liangxi Technology Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Dilution Refrigerators Industry Chain
- 10.2 Dilution Refrigerators Upstream Analysis
 - 10.2.1 Dilution Refrigerators Core Raw Materials
 - 10.2.2 Main Manufacturers of Dilution Refrigerators Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Dilution Refrigerators Production Mode

10.6 Dilution Refrigerators Procurement Model

10.7 Dilution Refrigerators Industry Sales Model and Sales Channels

10.7.1 Dilution Refrigerators Sales Model

10.7.2 Dilution Refrigerators Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Dilution Refrigerators Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Dilution Refrigerators Production Value by Region (2021-2026) & (USD Million)

Table 3. World Dilution Refrigerators Production Value by Region (2027-2032) & (USD Million)

Table 4. World Dilution Refrigerators Production Value Market Share by Region (2021-2026)

Table 5. World Dilution Refrigerators Production Value Market Share by Region (2027-2032)

Table 6. World Dilution Refrigerators Production by Region (2021-2026) & (Units)

Table 7. World Dilution Refrigerators Production by Region (2027-2032) & (Units)

Table 8. World Dilution Refrigerators Production Market Share by Region (2021-2026)

Table 9. World Dilution Refrigerators Production Market Share by Region (2027-2032)

Table 10. World Dilution Refrigerators Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Dilution Refrigerators Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Dilution Refrigerators Major Market Trends

Table 13. World Dilution Refrigerators Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Dilution Refrigerators Consumption by Region (2021-2026) & (Units)

Table 15. World Dilution Refrigerators Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Dilution Refrigerators Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Dilution Refrigerators Producers in 2025

Table 18. World Dilution Refrigerators Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Dilution Refrigerators Producers in 2025

Table 20. World Dilution Refrigerators Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Dilution Refrigerators Company Evaluation Quadrant

Table 22. World Dilution Refrigerators Industry Rank of Major Manufacturers, Based on

Production Value in 2025

Table 23. Head Office and Dilution Refrigerators Production Site of Key Manufacturer

Table 24. Dilution Refrigerators Market: Company Product Type Footprint

Table 25. Dilution Refrigerators Market: Company Product Application Footprint

Table 26. Dilution Refrigerators Competitive Factors

Table 27. Dilution Refrigerators New Entrant and Capacity Expansion Plans

Table 28. Dilution Refrigerators Mergers & Acquisitions Activity

Table 29. United States VS China Dilution Refrigerators Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Dilution Refrigerators Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Dilution Refrigerators Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Dilution Refrigerators Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Dilution Refrigerators Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Dilution Refrigerators Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Dilution Refrigerators Production Market Share (2021-2026)

Table 37. China Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Dilution Refrigerators Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Dilution Refrigerators Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Dilution Refrigerators Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Dilution Refrigerators Production Market Share (2021-2026)

Table 42. Rest of World Based Dilution Refrigerators Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Dilution Refrigerators Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Dilution Refrigerators Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Dilution Refrigerators Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Dilution Refrigerators Production Market Share (2021-2026)

Table 47. World Dilution Refrigerators Production Value by Base Temperature, (USD Million), 2021 & 2025 & 2032

Table 48. World Dilution Refrigerators Production by Base Temperature (2021-2026) & (Units)

Table 49. World Dilution Refrigerators Production by Base Temperature (2027-2032) & (Units)

Table 50. World Dilution Refrigerators Production Value by Base Temperature (2021-2026) & (USD Million)

Table 51. World Dilution Refrigerators Production Value by Base Temperature (2027-2032) & (USD Million)

Table 52. World Dilution Refrigerators Average Price by Base Temperature (2021-2026) & (US\$/Unit)

Table 53. World Dilution Refrigerators Average Price by Base Temperature (2027-2032) & (US\$/Unit)

Table 54. World Dilution Refrigerators Production Value by Liquid Nitrogen Replenishment, (USD Million), 2021 & 2025 & 2032

Table 55. World Dilution Refrigerators Production by Liquid Nitrogen Replenishment (2021-2026) & (Units)

Table 56. World Dilution Refrigerators Production by Liquid Nitrogen Replenishment (2027-2032) & (Units)

Table 57. World Dilution Refrigerators Production Value by Liquid Nitrogen Replenishment (2021-2026) & (USD Million)

Table 58. World Dilution Refrigerators Production Value by Liquid Nitrogen Replenishment (2027-2032) & (USD Million)

Table 59. World Dilution Refrigerators Average Price by Liquid Nitrogen Replenishment (2021-2026) & (US\$/Unit)

Table 60. World Dilution Refrigerators Average Price by Liquid Nitrogen Replenishment (2027-2032) & (US\$/Unit)

Table 61. World Dilution Refrigerators Production Value by End User, (USD Million), 2021 & 2025 & 2032

Table 62. World Dilution Refrigerators Production by End User (2021-2026) & (Units)

Table 63. World Dilution Refrigerators Production by End User (2027-2032) & (Units)

Table 64. World Dilution Refrigerators Production Value by End User (2021-2026) & (USD Million)

Table 65. World Dilution Refrigerators Production Value by End User (2027-2032) &

(USD Million)

Table 66. World Dilution Refrigerators Average Price by End User (2021-2026) & (US\$/Unit)

Table 67. World Dilution Refrigerators Average Price by End User (2027-2032) & (US\$/Unit)

Table 68. World Dilution Refrigerators Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Dilution Refrigerators Production by Application (2021-2026) & (Units)

Table 70. World Dilution Refrigerators Production by Application (2027-2032) & (Units)

Table 71. World Dilution Refrigerators Production Value by Application (2021-2026) & (USD Million)

Table 72. World Dilution Refrigerators Production Value by Application (2027-2032) & (USD Million)

Table 73. World Dilution Refrigerators Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Dilution Refrigerators Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Bluefors Oy Basic Information, Manufacturing Base and Competitors

Table 76. Bluefors Oy Major Business

Table 77. Bluefors Oy Dilution Refrigerators Product and Services

Table 78. Bluefors Oy Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Bluefors Oy Recent Developments/Updates

Table 80. Bluefors Oy Competitive Strengths & Weaknesses

Table 81. Oxford Instruments NanoScience Basic Information, Manufacturing Base and Competitors

Table 82. Oxford Instruments NanoScience Major Business

Table 83. Oxford Instruments NanoScience Dilution Refrigerators Product and Services

Table 84. Oxford Instruments NanoScience Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Oxford Instruments NanoScience Recent Developments/Updates

Table 86. Oxford Instruments NanoScience Competitive Strengths & Weaknesses

Table 87. Leiden Cryogenics BV Basic Information, Manufacturing Base and Competitors

Table 88. Leiden Cryogenics BV Major Business

Table 89. Leiden Cryogenics BV Dilution Refrigerators Product and Services

Table 90. Leiden Cryogenics BV Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 91. Leiden Cryogenics BV Recent Developments/Updates

Table 92. Leiden Cryogenics BV Competitive Strengths & Weaknesses

Table 93. Air Liquide(Cryoconcept) Basic Information, Manufacturing Base and Competitors

Table 94. Air Liquide(Cryoconcept) Major Business

Table 95. Air Liquide(Cryoconcept) Dilution Refrigerators Product and Services

Table 96. Air Liquide(Cryoconcept) Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Air Liquide(Cryoconcept) Recent Developments/Updates

Table 98. Air Liquide(Cryoconcept) Competitive Strengths & Weaknesses

Table 99. JanisULT Basic Information, Manufacturing Base and Competitors

Table 100. JanisULT Major Business

Table 101. JanisULT Dilution Refrigerators Product and Services

Table 102. JanisULT Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. JanisULT Recent Developments/Updates

Table 104. JanisULT Competitive Strengths & Weaknesses

Table 105. Taiyo Nippon Sanso Basic Information, Manufacturing Base and Competitors

Table 106. Taiyo Nippon Sanso Major Business

Table 107. Taiyo Nippon Sanso Dilution Refrigerators Product and Services

Table 108. Taiyo Nippon Sanso Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Taiyo Nippon Sanso Recent Developments/Updates

Table 110. Taiyo Nippon Sanso Competitive Strengths & Weaknesses

Table 111. ULVAC CRYOGENICS INC Basic Information, Manufacturing Base and Competitors

Table 112. ULVAC CRYOGENICS INC Major Business

Table 113. ULVAC CRYOGENICS INC Dilution Refrigerators Product and Services

Table 114. ULVAC CRYOGENICS INC Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. ULVAC CRYOGENICS INC Recent Developments/Updates

Table 116. ULVAC CRYOGENICS INC Competitive Strengths & Weaknesses

Table 117. Quantum Design Basic Information, Manufacturing Base and Competitors

Table 118. Quantum Design Major Business

- Table 119. Quantum Design Dilution Refrigerators Product and Services
- Table 120. Quantum Design Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Quantum Design Recent Developments/Updates
- Table 122. Quantum Design Competitive Strengths & Weaknesses
- Table 123. ICEoxford Basic Information, Manufacturing Base and Competitors
- Table 124. ICEoxford Major Business
- Table 125. ICEoxford Dilution Refrigerators Product and Services
- Table 126. ICEoxford Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. ICEoxford Recent Developments/Updates
- Table 128. ICEoxford Competitive Strengths & Weaknesses
- Table 129. CETC 16th Research Institute Basic Information, Manufacturing Base and Competitors
- Table 130. CETC 16th Research Institute Major Business
- Table 131. CETC 16th Research Institute Dilution Refrigerators Product and Services
- Table 132. CETC 16th Research Institute Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. CETC 16th Research Institute Recent Developments/Updates
- Table 134. CETC 16th Research Institute Competitive Strengths & Weaknesses
- Table 135. ZLCryogenic Basic Information, Manufacturing Base and Competitors
- Table 136. ZLCryogenic Major Business
- Table 137. ZLCryogenic Dilution Refrigerators Product and Services
- Table 138. ZLCryogenic Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. ZLCryogenic Recent Developments/Updates
- Table 140. ZLCryogenic Competitive Strengths & Weaknesses
- Table 141. Beijing Physike Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 142. Beijing Physike Technology Co., Ltd. Major Business
- Table 143. Beijing Physike Technology Co., Ltd. Dilution Refrigerators Product and Services
- Table 144. Beijing Physike Technology Co., Ltd. Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Beijing Physike Technology Co., Ltd. Recent Developments/Updates
- Table 146. Beijing Physike Technology Co., Ltd. Competitive Strengths & Weaknesses
- Table 147. Shanghai Boreas Cryogenics Basic Information, Manufacturing Base and

Competitors

Table 148. Shanghai Boreas Cryogenics Major Business

Table 149. Shanghai Boreas Cryogenics Dilution Refrigerators Product and Services

Table 150. Shanghai Boreas Cryogenics Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Shanghai Boreas Cryogenics Recent Developments/Updates

Table 152. Shanghai Boreas Cryogenics Competitive Strengths & Weaknesses

Table 153. Shanghai Liangxi Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. Shanghai Liangxi Technology Co., Ltd. Major Business

Table 155. Shanghai Liangxi Technology Co., Ltd. Dilution Refrigerators Product and Services

Table 156. Shanghai Liangxi Technology Co., Ltd. Dilution Refrigerators Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Shanghai Liangxi Technology Co., Ltd. Recent Developments/Updates

Table 158. Shanghai Liangxi Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Global Key Players of Dilution Refrigerators Upstream (Raw Materials)

Table 160. Global Dilution Refrigerators Typical Customers

Table 161. Dilution Refrigerators Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Dilution Refrigerators Picture

Figure 2. World Dilution Refrigerators Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Dilution Refrigerators Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Dilution Refrigerators Production (2021-2032) & (Units)

Figure 5. World Dilution Refrigerators Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Dilution Refrigerators Production Value Market Share by Region (2021-2032)

Figure 7. World Dilution Refrigerators Production Market Share by Region (2021-2032)

Figure 8. North America Dilution Refrigerators Production (2021-2032) & (Units)

Figure 9. Europe Dilution Refrigerators Production (2021-2032) & (Units)

Figure 10. China Dilution Refrigerators Production (2021-2032) & (Units)

Figure 11. Japan Dilution Refrigerators Production (2021-2032) & (Units)

Figure 12. Dilution Refrigerators Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 15. World Dilution Refrigerators Consumption Market Share by Region (2021-2032)

Figure 16. United States Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 17. China Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 18. Europe Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 19. Japan Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 20. South Korea Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 21. ASEAN Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 22. India Dilution Refrigerators Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Dilution Refrigerators by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Dilution Refrigerators Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Dilution Refrigerators Markets in 2025

Figure 26. United States VS China: Dilution Refrigerators Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Dilution Refrigerators Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Dilution Refrigerators Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Dilution Refrigerators Production Market Share 2025

Figure 30. China Based Manufacturers Dilution Refrigerators Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Dilution Refrigerators Production Market Share 2025

Figure 32. World Dilution Refrigerators Production Value by Base Temperature, (USD Million), 2021 & 2025 & 2032

Figure 33. World Dilution Refrigerators Production Value Market Share by Base Temperature in 2025

Figure 34. Base Temperature Below 10mK

Figure 35. Base Temperature Between 10-20mK

Figure 36. Base Temperature Above 20mK

Figure 37. World Dilution Refrigerators Production Market Share by Base Temperature (2021-2032)

Figure 38. World Dilution Refrigerators Production Value Market Share by Base Temperature (2021-2032)

Figure 39. World Dilution Refrigerators Average Price by Base Temperature (2021-2032) & (US\$/Unit)

Figure 40. World Dilution Refrigerators Production Value by Liquid Nitrogen Replenishment, (USD Million), 2021 & 2025 & 2032

Figure 41. World Dilution Refrigerators Production Value Market Share by Liquid Nitrogen Replenishment in 2025

Figure 42. Wet Dilution Refrigerator

Figure 43. Cryogen-Free Dilution Refrigerator

Figure 44. World Dilution Refrigerators Production Market Share by Liquid Nitrogen Replenishment (2021-2032)

Figure 45. World Dilution Refrigerators Production Value Market Share by Liquid Nitrogen Replenishment (2021-2032)

Figure 46. World Dilution Refrigerators Average Price by Liquid Nitrogen Replenishment (2021-2032) & (US\$/Unit)

Figure 47. World Dilution Refrigerators Production Value by End User, (USD Million), 2021 & 2025 & 2032

Figure 48. World Dilution Refrigerators Production Value Market Share by End User in 2025

Figure 49. R&D Type

Figure 50. Industrial Production Type

Figure 51. World Dilution Refrigerators Production Market Share by End User (2021-2032)

Figure 52. World Dilution Refrigerators Production Value Market Share by End User (2021-2032)

Figure 53. World Dilution Refrigerators Average Price by End User (2021-2032) & (US\$/Unit)

Figure 54. World Dilution Refrigerators Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Dilution Refrigerators Production Value Market Share by Application in 2025

Figure 56. Quantum Computing

Figure 57. Nano Research

Figure 58. Low Temperature Detection

Figure 59. Others

Figure 60. World Dilution Refrigerators Production Market Share by Application (2021-2032)

Figure 61. World Dilution Refrigerators Production Value Market Share by Application (2021-2032)

Figure 62. World Dilution Refrigerators Average Price by Application (2021-2032) & (US\$/Unit)

Figure 63. Dilution Refrigerators Industry Chain

Figure 64. Dilution Refrigerators Procurement Model

Figure 65. Dilution Refrigerators Sales Model

Figure 66. Dilution Refrigerators Sales Channels, Direct Sales, and Distribution

Figure 67. Methodology

Figure 68. Research Process and Data Source

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