

Global Dry Dilution Refrigerator Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dry Dilution Refrigerator market size is expected to reach \$ 1547 million by 2032, rising at a market growth of 26.6% CAGR during the forecast period (2026-2032).

In 2025, global Dry Dilution Refrigerator production reached approximately 457 units with average price of 656,000 USD/Unit.

A dry dilution refrigerator is an ultra-low-temperature system that uses a mechanical cryocooler for precooling and the endothermic mixing of helium-3 and helium-4 to provide continuous refrigeration at millikelvin temperatures. The term "dry" indicates that the system does not rely on a liquid-helium bath for precooling. Instead, it generally uses a pulse-tube cryocooler or another closed-cycle refrigeration unit, and is therefore also commonly described as a cryogen-free dilution refrigerator.

A typical system consists of a mechanical cryocooler, vacuum chamber, radiation shields, helium-3/helium-4 circulation loop, condensation stage, heat exchangers, still, mixing chamber, gas-handling system, temperature-control electronics and experimental platform. Commercial systems generally reach base temperatures below 10 mK, while selected high-performance models can achieve approximately 5 mK or lower. Key performance indicators include base temperature, cooling power at the mixing chamber, cooldown time, experimental volume, wiring capacity, vibration, temperature stability and level of automation. Major applications include superconducting quantum computing, quantum-chip testing, condensed-matter physics, quantum-material research, low-temperature detectors, quantum sensing and fundamental physics.

The upstream segment includes helium-3 and high-purity helium-4, pulse-tube

cryocoolers, compressors, vacuum pumps, cryogenic heat exchangers, vacuum vessels, oxygen-free high-conductivity copper, stainless steel, low-temperature seals, temperature sensors, vacuum gauges, radio-frequency coaxial cables, direct-current wiring, cryogenic filters, low-noise amplifiers, magnetic-shielding materials and control electronics. Helium-3 supply, low-vibration cryocoolers, high-purity copper processing, cryogenic thermometry and high-density wiring are particularly important to system performance and lead time.

The midstream segment consists of dry dilution refrigerator manufacturers and cryogenic system integrators. Their activities include thermodynamic design, cryogenic mechanical design, vacuum-system fabrication, helium-mixture circulation integration, heat-exchanger and mixing-chamber manufacturing, final assembly, flow and temperature control, automation-software development, performance calibration and reliability testing. Some suppliers also integrate superconducting magnets, cryogenic probe stations, optical access, microwave wiring, cryogenic electronics, magnetic shielding, rapid sample-exchange modules and high-channel-count wiring for quantum processors.

Downstream customers include quantum-computing companies, universities, national laboratories, research institutes, semiconductor and quantum-chip developers, quantum-sensing companies, and aerospace or defense organizations. Sales are generally project-based and highly customized, covering system design, technical confirmation, manufacturing, factory acceptance, transportation, installation, on-site cooldown commissioning and lifecycle maintenance. Because of the complexity and high value of the equipment, customers place strong emphasis on installed-base experience, refrigeration performance, delivery capability, local service and future system expandability.

The principal growth driver for the dry dilution refrigerator market is the continued development and commercialization of quantum computing. Superconducting qubits require millikelvin operating environments, and increasing processor scale is raising requirements for cooling power, experimental volume, radio-frequency and direct-current wiring, and integrated cryogenic electronics. Quantum-computing companies are also moving from the purchase of a limited number of laboratory systems toward parallel deployment for chip development, device screening, system integration and reliability testing. This transition will support demand for larger systems with higher cooling power and greater wiring capacity.

The market is expected to develop in both larger-scale and compact directions. Large

platforms for high-qubit-count processors require greater cryogenic volume, increased cooling power near 100 mK, lower vibration and more sophisticated cable management. At the same time, compact, benchtop and rapid-sample-exchange systems will benefit from high-throughput quantum-device testing, materials screening and demand for improved laboratory utilization. Automated cooldown, remote control, diagnostics, modular upgrades and integration with quantum-control systems and cryogenic electronics will become increasingly important product features.

Outside quantum computing, condensed-matter physics, quantum materials, low-temperature detectors, astrophysics, quantum sensing and fundamental physics will continue to provide a stable demand base. Market expansion may be constrained by limited helium-3 availability, long lead times for critical components, high system prices, shortages of specialized personnel and uncertainty over the pace of quantum-computing commercialization. Over the long term, competition will move beyond base temperature alone toward cooling capacity, wiring density, vibration control, operational stability, automation, serviceability and total cost of ownership. Suppliers with scalable manufacturing, a proven installed base, global technical support and strong integration capabilities are expected to maintain the strongest competitive positions.

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

This report is a detailed and comprehensive analysis of the world market for Dry Dilution Refrigerator 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 Dry Dilution Refrigerator that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dry Dilution Refrigerator total production and demand, 2021-2032, (Units)
Global Dry Dilution Refrigerator total production value, 2021-2032, (USD Million)
Global Dry Dilution Refrigerator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Dry Dilution Refrigerator consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Dry Dilution Refrigerator domestic production, consumption, key domestic manufacturers and share
Global Dry Dilution Refrigerator production by manufacturer, production, price, value

and market share 2021-2026, (USD Million) & (Units)

Global Dry Dilution Refrigerator production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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

This report profiles key players in the global Dry Dilution Refrigerator 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, Shanghai Q-One Technology Co., Ltd., Hefei Zhileng Cryogenic Technology Co., Ltd., Leiden Cryogenics B.V., FormFactor, Inc. / JanisULT, Maybell Quantum Industries, The 16th Research Institute of CETC, Origin Quantum Computing Technology Co., Ltd., CSIC Pride (Nanjing) Cryogenic Technology Co., Ltd., 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 Dry Dilution Refrigerator market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, 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 Dry Dilution Refrigerator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dry Dilution Refrigerator Market, Segmentation by Type:

Ultimate Temperature Range > 20 mK

Ultimate Temperature Range 5?20 mK

Ultimate Temperature

Global Dry Dilution Refrigerator Market, Segmentation by Power Range:

Low-Power Benchtop Models (0?10 ?W)

Medium-Power Standard Models (10?100 ?W)

High-Power Industrial-Grade Models (> 100 ?W)

Global Dry Dilution Refrigerator Market, Segmentation by Structure:

All-In-One Integrated Design

Modular and Expandable Design

Global Dry Dilution Refrigerator Market, Segmentation by Application:

Quantum Computing

Condensed Matter Research

Others

Companies Profiled:

Bluefors Oy

Oxford Instruments NanoScience

Shanghai Q-One Technology Co., Ltd.

Hefei Zhileng Cryogenic Technology Co., Ltd.

Leiden Cryogenics B.V.

FormFactor, Inc. / JanisULT

Maybell Quantum Industries

The 16th Research Institute of CETC

Origin Quantum Computing Technology Co., Ltd.

CSIC Pride (Nanjing) Cryogenic Technology Co., Ltd.

QuantumCTek Co., Ltd.

CAS Quantum Measurement Instrument Co., Ltd.

Taiyo Nippon Sanso Corporation

ICEoxford Ltd.

ULVAC CRYOGENICS INC.

Key Questions Answered:

1. How big is the global Dry Dilution Refrigerator market?
2. What is the demand of the global Dry Dilution Refrigerator market?

3. What is the year over year growth of the global Dry Dilution Refrigerator market?
4. What is the production and production value of the global Dry Dilution Refrigerator market?
5. Who are the key producers in the global Dry Dilution Refrigerator market?
6. What are the growth factors driving the market demand?

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