

Global Gifford-McMahon Refrigerator Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Gifford-McMahon Refrigerator market size is expected to reach \$ 824 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Gifford-McMahon Refrigerators, also referred to GM Cryogenic Refrigerators or GM cryocoolers, are mechanical cryogenic refrigeration systems that use helium as the principal working fluid and employ a closed-cycle helium compressor, high- and low-pressure gas lines, and a cryogenic cold head to provide continuous refrigeration. Under the broad market scope adopted in this report, the category comprises conventional Gifford-McMahon refrigerators, GM-type pulse tube cryocoolers, and Gifford-McMahon/Joule-Thomson refrigerators. During operation, helium circulates within a sealed system and removes heat through compression, expansion, regenerative heat exchange, pressure oscillation, or throttling processes, enabling stable cryogenic cooling without the continuous consumption of liquid nitrogen or liquid helium.

In 2025, global Gifford-McMahon Refrigerators production reached approximately 21.9 k units, with an average global market price of around US\$ 24.6 k per unit

The principal upstream materials include oxygen-free high-conductivity copper for cold tips, heat exchangers, thermal links and bus structures; stainless steel and nickel-alloy precision tubes for pressure cylinders, displacers, gas lines and structural components; stainless-steel mesh, phosphor-bronze mesh, lead particles and rare-earth compounds for regenerators; engineering plastics and composite materials for displacer bodies and thermal insulation; lubricants, adsorbents and oil-separation materials for helium compressors; and precision valves, motors, bearings, seals, sensors, electronic

controllers and power modules. Representative oxygen-free copper suppliers include Mitsubishi Materials and Luvata; Mitsubishi Materials describes oxygen-free copper as a high-purity material with high electrical and thermal conductivity. Alleima is a representative supplier of seamless and redrawn stainless-steel and nickel-alloy precision tubing

Representative downstream users include Siemens Healthineers, GE HealthCare, Applied Materials, Lam Research, Tokyo Electron and KLA, etc.

The gross margin of Gifford-McMahon Refrigerators are generally estimated at approximately 25%–45%.

Gifford-McMahon Refrigerators are mechanical cryogenic refrigeration systems that use a closed helium cycle, a regenerator and a reciprocating displacer to provide continuous low-temperature cooling. By operating-temperature range, the market is divided into Under 10K or 10K, 10.1K-30K and Above 30K products. Under 10K or 10K systems are generally based on two-stage refrigeration structures and are designed for superconducting magnets, low-temperature physics and other deep-cryogenic applications. They require advanced regenerator materials, precision manufacturing and high long-term reliability, making them one of the most technically demanding product categories.

The principal downstream applications are MRI and NMR, Scientific Instruments and Laboratory Cryostats, Cryopumps and Vacuum Systems, and Others. MRI and NMR applications include medical magnetic resonance imaging systems and analytical nuclear magnetic resonance spectrometers, where Gifford-McMahon Refrigerators continuously cool superconducting magnets, reduce helium boil-off and support low-helium or cryogen-free system designs. Scientific Instruments and Laboratory Cryostats cover laboratory cryostats, superconducting magnet platforms, material-property measurement systems, quantum research, spectroscopy, detector testing and cryogenic microscopy. This segment is characterized by diversified specifications, relatively limited production volumes and a high degree of customization. Cryopumps and Vacuum Systems use Gifford-McMahon Refrigerators to create cryogenic condensation and adsorption surfaces for semiconductor manufacturing, display production, optical coating, electronic-device processing and scientific vacuum systems.

The global Gifford-McMahon Closed Cycle Cryocooler market is characterized by high technical barriers and demanding customer-qualification requirements. Major participants include Sumitomo Heavy Industries, Edwards Vacuum LLC, ULVAC

CRYOGENICS, Bluefors Oy through Cryomech, Pengli Technology, Bwokai Technologies, Suzhou Bama Superconductive Technology, Hynhe Technology, Advanced Research System and Oxford Cryosystems. Leading manufacturers generally possess extensive cryogenic engineering experience, proprietary cold-head and compressor technologies, broad product portfolios, long-term reliability records and international service capabilities. Their ability to supply cold heads, helium compressors, gas lines, controllers and system-integration support creates substantial competitive advantages. Chinese manufacturers are progressively establishing domestic Gifford-McMahon Closed Cycle Cryocooler product lines and expanding into scientific instruments, cryogenic vacuum equipment, superconducting systems and import-substitution projects, although further progress is still required in advanced regenerator materials, ultra-low-vibration design, extended operating life and international customer qualification.

Market growth is supported by multiple driving factors. Expansion of the installed base of medical magnetic resonance imaging equipment and the transition toward low-helium and cryogen-free superconducting magnet systems are increasing demand for closed-cycle refrigeration. Continued development of quantum computing, quantum sensing, superconducting detection and cryogenic material research is encouraging laboratories and research institutions to deploy more low-temperature platforms. Sustained demand for high-vacuum processing in semiconductor, display and advanced electronic-device manufacturing supports the market for cryopumps and their integrated GM refrigeration units. Helium-price volatility and concerns regarding helium-supply security are encouraging users to adopt helium recondensation and closed-cycle refrigeration systems. In addition, improvements in cold-head lifetime, compressor efficiency, vibration management, digital controls and remote condition monitoring are enhancing system reliability and expanding addressable applications.

The market also faces several restraints. Gifford-McMahon Refrigerators contain precision displacers, regenerators, rotary valves and helium compressors, resulting in demanding manufacturing tolerances and relatively high production costs. Deep-cryogenic models depend on specialized rare-earth regenerator materials, precision machining and low-temperature sealing technologies, creating potential supply-chain constraints. Long product-lifetime testing, application matching and customer-qualification procedures make it difficult for new entrants to obtain approvals from medical, semiconductor and major scientific-equipment customers. Furthermore, fluctuations in medical-equipment investment, semiconductor capital expenditure and the approval schedules of large scientific projects can create cyclical and project-related volatility in market demand.

Report Scope

This report studies the global Gifford-McMahon Refrigerator production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Gifford-McMahon Refrigerator total production and demand, 2021-2032, (Units)

Global Gifford-McMahon Refrigerator total production value, 2021-2032, (USD Million)

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

Global Gifford-McMahon Refrigerator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Gifford-McMahon Refrigerator domestic production, consumption, key domestic manufacturers and share

Global Gifford-McMahon Refrigerator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

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

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

This report profiles key players in the global Gifford-McMahon 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 Sumitomo Heavy Industries (SHI), Edwards Vacuum LLC, ULVAC CRYOGENICS, Bluefors?Cryomech?, Pengli Technology, Bwokai Technologies, Suzhou Bama Superconductive Technology, Hynhe Technology, Advanced Research System, Oxford Cryosystems, 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 Gifford-McMahon 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 Gifford-McMahon Refrigerator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gifford-McMahon Refrigerator Market, Segmentation by Type:

Under 10K or 10K

10.1K-30K

Above 30K

Global Gifford-McMahon Refrigerator Market, Segmentation by Cooling Mechanism:

Conventional GM Cryocoolers

GM Pulse Tube Cryocoolers

GM-JT Cryocollers

Global Gifford-McMahon Refrigerator Market, Segmentation by End-Use Industry:

Semiconductor and Electronic Device Manufacturing

Medical and Life Sciences

Research and Development

Energy and Superconducting Technology

Industrial Gases and Cryogenic Processing

Others

Global Gifford-McMahon Refrigerator Market, Segmentation by

Application:

MRI and NMR

Scientific Instruments and Laboratory Cryostats

Cryopumps and Vacuum Systems

Others

Companies Profiled:

Sumitomo Heavy Industries (SHI)

Edwards Vacuum LLC

ULVAC CRYOGENICS

Bluefors?Cryomech?

Pengli Technology

Bwokai Technologies

Suzhou Bama Superconductive Technology

Hynhe Technology

Advanced Research System

Oxford Cryosystems

Beijing Physike

Cryogenic Limited

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Gifford-McMahon Refrigerator Production Value by Manufacturer (2021-2026)
- 3.2 World Gifford-McMahon Refrigerator Production by Manufacturer (2021-2026)
- 3.3 World Gifford-McMahon Refrigerator Average Price by Manufacturer (2021-2026)
- 3.4 Gifford-McMahon Refrigerator Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Gifford-McMahon Refrigerator Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Gifford-McMahon Refrigerator in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Gifford-McMahon Refrigerator in 2025
- 3.6 Gifford-McMahon Refrigerator Market: Overall Company Footprint Analysis
 - 3.6.1 Gifford-McMahon Refrigerator Market: Region Footprint
 - 3.6.2 Gifford-McMahon Refrigerator Market: Company Product Type Footprint
 - 3.6.3 Gifford-McMahon Refrigerator 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: Gifford-McMahon Refrigerator Production Value Comparison
 - 4.1.1 United States VS China: Gifford-McMahon Refrigerator Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Gifford-McMahon Refrigerator Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Gifford-McMahon Refrigerator Production Comparison
 - 4.2.1 United States VS China: Gifford-McMahon Refrigerator Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Gifford-McMahon Refrigerator Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Gifford-McMahon Refrigerator Consumption Comparison
 - 4.3.1 United States VS China: Gifford-McMahon Refrigerator Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Gifford-McMahon Refrigerator Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Gifford-McMahon Refrigerator Manufacturers and Market

Share, 2021-2026

4.4.1 United States Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Gifford-McMahon Refrigerator Production Value (2021-2026)

4.4.3 United States Based Manufacturers Gifford-McMahon Refrigerator Production (2021-2026)

4.5 China Based Gifford-McMahon Refrigerator Manufacturers and Market Share

4.5.1 China Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Gifford-McMahon Refrigerator Production Value (2021-2026)

4.5.3 China Based Manufacturers Gifford-McMahon Refrigerator Production (2021-2026)

4.6 Rest of World Based Gifford-McMahon Refrigerator Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Gifford-McMahon Refrigerator Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Under 10K or 10K

5.2.2 10.1K-30K

5.2.3 Above 30K

5.3 Market Segment by Type

5.3.1 World Gifford-McMahon Refrigerator Production by Type (2021-2032)

5.3.2 World Gifford-McMahon Refrigerator Production Value by Type (2021-2032)

5.3.3 World Gifford-McMahon Refrigerator Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY COOLING MECHANISM

6.1 World Gifford-McMahon Refrigerator Market Size Overview by Cooling Mechanism:

2021 VS 2025 VS 2032

6.2 Segment Introduction by Cooling Mechanism

6.2.1 Conventional GM Cryocoolers

6.2.2 GM Pulse Tube Cryocoolers

6.2.3 GM-JT Cryocollers

6.3 Market Segment by Cooling Mechanism

6.3.1 World Gifford-McMahon Refrigerator Production by Cooling Mechanism
(2021-2032)

6.3.2 World Gifford-McMahon Refrigerator Production Value by Cooling Mechanism
(2021-2032)

6.3.3 World Gifford-McMahon Refrigerator Average Price by Cooling Mechanism
(2021-2032)

7 MARKET ANALYSIS BY END-USE INDUSTRY

7.1 World Gifford-McMahon Refrigerator Market Size Overview by End-Use Industry:
2021 VS 2025 VS 2032

7.2 Segment Introduction by End-Use Industry

7.2.1 Semiconductor and Electronic Device Manufacturing

7.2.2 Medical and Life Sciences

7.2.3 Research and Development

7.2.4 Energy and Superconducting Technology

7.2.5 Industrial Gases and Cryogenic Processing

7.2.6 Others

7.3 Market Segment by End-Use Industry

7.3.1 World Gifford-McMahon Refrigerator Production by End-Use Industry
(2021-2032)

7.3.2 World Gifford-McMahon Refrigerator Production Value by End-Use Industry
(2021-2032)

7.3.3 World Gifford-McMahon Refrigerator Average Price by End-Use Industry
(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Gifford-McMahon Refrigerator Market Size Overview by Application: 2021 VS
2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 MRI and NMR

8.2.2 Scientific Instruments and Laboratory Cryostats

8.2.3 Cryopumps and Vacuum Systems

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Gifford-McMahon Refrigerator Production by Application (2021-2032)

8.3.2 World Gifford-McMahon Refrigerator Production Value by Application
(2021-2032)

8.3.3 World Gifford-McMahon Refrigerator Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Sumitomo Heavy Industries (SHI)

9.1.1 Sumitomo Heavy Industries (SHI) Details

9.1.2 Sumitomo Heavy Industries (SHI) Major Business

9.1.3 Sumitomo Heavy Industries (SHI) Gifford-McMahon Refrigerator Product and
Services

9.1.4 Sumitomo Heavy Industries (SHI) Gifford-McMahon Refrigerator Production,
Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Sumitomo Heavy Industries (SHI) Recent Developments/Updates

9.1.6 Sumitomo Heavy Industries (SHI) Competitive Strengths & Weaknesses

9.2 Edwards Vacuum LLC

9.2.1 Edwards Vacuum LLC Details

9.2.2 Edwards Vacuum LLC Major Business

9.2.3 Edwards Vacuum LLC Gifford-McMahon Refrigerator Product and Services

9.2.4 Edwards Vacuum LLC Gifford-McMahon Refrigerator Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.2.5 Edwards Vacuum LLC Recent Developments/Updates

9.2.6 Edwards Vacuum LLC Competitive Strengths & Weaknesses

9.3 ULVAC CRYOGENICS

9.3.1 ULVAC CRYOGENICS Details

9.3.2 ULVAC CRYOGENICS Major Business

9.3.3 ULVAC CRYOGENICS Gifford-McMahon Refrigerator Product and Services

9.3.4 ULVAC CRYOGENICS Gifford-McMahon Refrigerator Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.3.5 ULVAC CRYOGENICS Recent Developments/Updates

9.3.6 ULVAC CRYOGENICS Competitive Strengths & Weaknesses

9.4 Bluefors?Cryomech?

9.4.1 Bluefors?Cryomech? Details

9.4.2 Bluefors?Cryomech? Major Business

9.4.3 Bluefors?Cryomech? Gifford-McMahon Refrigerator Product and Services

9.4.4 Bluefors?Cryomech? Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Bluefors?Cryomech? Recent Developments/Updates

9.4.6 Bluefors?Cryomech? Competitive Strengths & Weaknesses

9.5 Pengli Technology

9.5.1 Pengli Technology Details

9.5.2 Pengli Technology Major Business

9.5.3 Pengli Technology Gifford-McMahon Refrigerator Product and Services

9.5.4 Pengli Technology Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Pengli Technology Recent Developments/Updates

9.5.6 Pengli Technology Competitive Strengths & Weaknesses

9.6 Bwokai Technologies

9.6.1 Bwokai Technologies Details

9.6.2 Bwokai Technologies Major Business

9.6.3 Bwokai Technologies Gifford-McMahon Refrigerator Product and Services

9.6.4 Bwokai Technologies Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Bwokai Technologies Recent Developments/Updates

9.6.6 Bwokai Technologies Competitive Strengths & Weaknesses

9.7 Suzhou Bama Superconductive Technology

9.7.1 Suzhou Bama Superconductive Technology Details

9.7.2 Suzhou Bama Superconductive Technology Major Business

9.7.3 Suzhou Bama Superconductive Technology Gifford-McMahon Refrigerator Product and Services

9.7.4 Suzhou Bama Superconductive Technology Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Suzhou Bama Superconductive Technology Recent Developments/Updates

9.7.6 Suzhou Bama Superconductive Technology Competitive Strengths & Weaknesses

9.8 Hynhe Technology

9.8.1 Hynhe Technology Details

9.8.2 Hynhe Technology Major Business

9.8.3 Hynhe Technology Gifford-McMahon Refrigerator Product and Services

9.8.4 Hynhe Technology Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Hynhe Technology Recent Developments/Updates

9.8.6 Hynhe Technology Competitive Strengths & Weaknesses

9.9 Advanced Research System

- 9.9.1 Advanced Research System Details
- 9.9.2 Advanced Research System Major Business
- 9.9.3 Advanced Research System Gifford-McMahon Refrigerator Product and Services
- 9.9.4 Advanced Research System Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.9.5 Advanced Research System Recent Developments/Updates
- 9.9.6 Advanced Research System Competitive Strengths & Weaknesses
- 9.10 Oxford Cryosystems
 - 9.10.1 Oxford Cryosystems Details
 - 9.10.2 Oxford Cryosystems Major Business
 - 9.10.3 Oxford Cryosystems Gifford-McMahon Refrigerator Product and Services
 - 9.10.4 Oxford Cryosystems Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Oxford Cryosystems Recent Developments/Updates
 - 9.10.6 Oxford Cryosystems Competitive Strengths & Weaknesses
- 9.11 Beijing Physike
 - 9.11.1 Beijing Physike Details
 - 9.11.2 Beijing Physike Major Business
 - 9.11.3 Beijing Physike Gifford-McMahon Refrigerator Product and Services
 - 9.11.4 Beijing Physike Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Beijing Physike Recent Developments/Updates
 - 9.11.6 Beijing Physike Competitive Strengths & Weaknesses
- 9.12 Cryogenic Limited
 - 9.12.1 Cryogenic Limited Details
 - 9.12.2 Cryogenic Limited Major Business
 - 9.12.3 Cryogenic Limited Gifford-McMahon Refrigerator Product and Services
 - 9.12.4 Cryogenic Limited Gifford-McMahon Refrigerator Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Cryogenic Limited Recent Developments/Updates
 - 9.12.6 Cryogenic Limited Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Gifford-McMahon Refrigerator Industry Chain
- 10.2 Gifford-McMahon Refrigerator Upstream Analysis
 - 10.2.1 Gifford-McMahon Refrigerator Core Raw Materials
 - 10.2.2 Main Manufacturers of Gifford-McMahon Refrigerator Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Gifford-McMahon Refrigerator Production Mode

10.6 Gifford-McMahon Refrigerator Procurement Model

10.7 Gifford-McMahon Refrigerator Industry Sales Model and Sales Channels

10.7.1 Gifford-McMahon Refrigerator Sales Model

10.7.2 Gifford-McMahon Refrigerator 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 Gifford-McMahon Refrigerator Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Gifford-McMahon Refrigerator Production Value by Region (2021-2026) & (USD Million)

Table 3. World Gifford-McMahon Refrigerator Production Value by Region (2027-2032) & (USD Million)

Table 4. World Gifford-McMahon Refrigerator Production Value Market Share by Region (2021-2026)

Table 5. World Gifford-McMahon Refrigerator Production Value Market Share by Region (2027-2032)

Table 6. World Gifford-McMahon Refrigerator Production by Region (2021-2026) & (Units)

Table 7. World Gifford-McMahon Refrigerator Production by Region (2027-2032) & (Units)

Table 8. World Gifford-McMahon Refrigerator Production Market Share by Region (2021-2026)

Table 9. World Gifford-McMahon Refrigerator Production Market Share by Region (2027-2032)

Table 10. World Gifford-McMahon Refrigerator Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Gifford-McMahon Refrigerator Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Gifford-McMahon Refrigerator Major Market Trends

Table 13. World Gifford-McMahon Refrigerator Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Gifford-McMahon Refrigerator Consumption by Region (2021-2026) & (Units)

Table 15. World Gifford-McMahon Refrigerator Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Gifford-McMahon Refrigerator Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Gifford-McMahon Refrigerator Producers in 2025

Table 18. World Gifford-McMahon Refrigerator Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Gifford-McMahon Refrigerator Producers in 2025

Table 20. World Gifford-McMahon Refrigerator Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Gifford-McMahon Refrigerator Company Evaluation Quadrant

Table 22. World Gifford-McMahon Refrigerator Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Gifford-McMahon Refrigerator Production Site of Key Manufacturer

Table 24. Gifford-McMahon Refrigerator Market: Company Product Type Footprint

Table 25. Gifford-McMahon Refrigerator Market: Company Product Application Footprint

Table 26. Gifford-McMahon Refrigerator Competitive Factors

Table 27. Gifford-McMahon Refrigerator New Entrant and Capacity Expansion Plans

Table 28. Gifford-McMahon Refrigerator Mergers & Acquisitions Activity

Table 29. United States VS China Gifford-McMahon Refrigerator Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Gifford-McMahon Refrigerator Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Gifford-McMahon Refrigerator Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Gifford-McMahon Refrigerator Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Gifford-McMahon Refrigerator Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Gifford-McMahon Refrigerator Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Gifford-McMahon Refrigerator Production Market Share (2021-2026)

Table 37. China Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Gifford-McMahon Refrigerator Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Gifford-McMahon Refrigerator Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Gifford-McMahon Refrigerator Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Gifford-McMahon Refrigerator Production Market Share (2021-2026)

Table 42. Rest of World Based Gifford-McMahon Refrigerator Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production Market Share (2021-2026)

Table 47. World Gifford-McMahon Refrigerator Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Gifford-McMahon Refrigerator Production by Type (2021-2026) & (Units)

Table 49. World Gifford-McMahon Refrigerator Production by Type (2027-2032) & (Units)

Table 50. World Gifford-McMahon Refrigerator Production Value by Type (2021-2026) & (USD Million)

Table 51. World Gifford-McMahon Refrigerator Production Value by Type (2027-2032) & (USD Million)

Table 52. World Gifford-McMahon Refrigerator Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Gifford-McMahon Refrigerator Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Gifford-McMahon Refrigerator Production Value by Cooling Mechanism, (USD Million), 2021 & 2025 & 2032

Table 55. World Gifford-McMahon Refrigerator Production by Cooling Mechanism (2021-2026) & (Units)

Table 56. World Gifford-McMahon Refrigerator Production by Cooling Mechanism (2027-2032) & (Units)

Table 57. World Gifford-McMahon Refrigerator Production Value by Cooling Mechanism (2021-2026) & (USD Million)

Table 58. World Gifford-McMahon Refrigerator Production Value by Cooling Mechanism (2027-2032) & (USD Million)

Table 59. World Gifford-McMahon Refrigerator Average Price by Cooling Mechanism (2021-2026) & (K US\$/Unit)

Table 60. World Gifford-McMahon Refrigerator Average Price by Cooling Mechanism

(2027-2032) & (K US\$/Unit)

Table 61. World Gifford-McMahon Refrigerator Production Value by End-Use Industry, (USD Million), 2021 & 2025 & 2032

Table 62. World Gifford-McMahon Refrigerator Production by End-Use Industry (2021-2026) & (Units)

Table 63. World Gifford-McMahon Refrigerator Production by End-Use Industry (2027-2032) & (Units)

Table 64. World Gifford-McMahon Refrigerator Production Value by End-Use Industry (2021-2026) & (USD Million)

Table 65. World Gifford-McMahon Refrigerator Production Value by End-Use Industry (2027-2032) & (USD Million)

Table 66. World Gifford-McMahon Refrigerator Average Price by End-Use Industry (2021-2026) & (K US\$/Unit)

Table 67. World Gifford-McMahon Refrigerator Average Price by End-Use Industry (2027-2032) & (K US\$/Unit)

Table 68. World Gifford-McMahon Refrigerator Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Gifford-McMahon Refrigerator Production by Application (2021-2026) & (Units)

Table 70. World Gifford-McMahon Refrigerator Production by Application (2027-2032) & (Units)

Table 71. World Gifford-McMahon Refrigerator Production Value by Application (2021-2026) & (USD Million)

Table 72. World Gifford-McMahon Refrigerator Production Value by Application (2027-2032) & (USD Million)

Table 73. World Gifford-McMahon Refrigerator Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Gifford-McMahon Refrigerator Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Sumitomo Heavy Industries (SHI) Basic Information, Manufacturing Base and Competitors

Table 76. Sumitomo Heavy Industries (SHI) Major Business

Table 77. Sumitomo Heavy Industries (SHI) Gifford-McMahon Refrigerator Product and Services

Table 78. Sumitomo Heavy Industries (SHI) Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Sumitomo Heavy Industries (SHI) Recent Developments/Updates

Table 80. Sumitomo Heavy Industries (SHI) Competitive Strengths & Weaknesses

Table 81. Edwards Vacuum LLC Basic Information, Manufacturing Base and Competitors
Table 82. Edwards Vacuum LLC Major Business
Table 83. Edwards Vacuum LLC Gifford-McMahon Refrigerator Product and Services
Table 84. Edwards Vacuum LLC Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Edwards Vacuum LLC Recent Developments/Updates
Table 86. Edwards Vacuum LLC Competitive Strengths & Weaknesses
Table 87. ULVAC CRYOGENICS Basic Information, Manufacturing Base and Competitors
Table 88. ULVAC CRYOGENICS Major Business
Table 89. ULVAC CRYOGENICS Gifford-McMahon Refrigerator Product and Services
Table 90. ULVAC CRYOGENICS Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. ULVAC CRYOGENICS Recent Developments/Updates
Table 92. ULVAC CRYOGENICS Competitive Strengths & Weaknesses
Table 93. Bluefors?Cryomech? Basic Information, Manufacturing Base and Competitors
Table 94. Bluefors?Cryomech? Major Business
Table 95. Bluefors?Cryomech? Gifford-McMahon Refrigerator Product and Services
Table 96. Bluefors?Cryomech? Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Bluefors?Cryomech? Recent Developments/Updates
Table 98. Bluefors?Cryomech? Competitive Strengths & Weaknesses
Table 99. Pengli Technology Basic Information, Manufacturing Base and Competitors
Table 100. Pengli Technology Major Business
Table 101. Pengli Technology Gifford-McMahon Refrigerator Product and Services
Table 102. Pengli Technology Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Pengli Technology Recent Developments/Updates
Table 104. Pengli Technology Competitive Strengths & Weaknesses
Table 105. Bwokai Technologies Basic Information, Manufacturing Base and Competitors
Table 106. Bwokai Technologies Major Business
Table 107. Bwokai Technologies Gifford-McMahon Refrigerator Product and Services
Table 108. Bwokai Technologies Gifford-McMahon Refrigerator Production (Units),

Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Bwokai Technologies Recent Developments/Updates

Table 110. Bwokai Technologies Competitive Strengths & Weaknesses

Table 111. Suzhou Bama Superconductive Technology Basic Information, Manufacturing Base and Competitors

Table 112. Suzhou Bama Superconductive Technology Major Business

Table 113. Suzhou Bama Superconductive Technology Gifford-McMahon Refrigerator Product and Services

Table 114. Suzhou Bama Superconductive Technology Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Suzhou Bama Superconductive Technology Recent Developments/Updates

Table 116. Suzhou Bama Superconductive Technology Competitive Strengths & Weaknesses

Table 117. Hynhe Technology Basic Information, Manufacturing Base and Competitors

Table 118. Hynhe Technology Major Business

Table 119. Hynhe Technology Gifford-McMahon Refrigerator Product and Services

Table 120. Hynhe Technology Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Hynhe Technology Recent Developments/Updates

Table 122. Hynhe Technology Competitive Strengths & Weaknesses

Table 123. Advanced Research System Basic Information, Manufacturing Base and Competitors

Table 124. Advanced Research System Major Business

Table 125. Advanced Research System Gifford-McMahon Refrigerator Product and Services

Table 126. Advanced Research System Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Advanced Research System Recent Developments/Updates

Table 128. Advanced Research System Competitive Strengths & Weaknesses

Table 129. Oxford Cryosystems Basic Information, Manufacturing Base and Competitors

Table 130. Oxford Cryosystems Major Business

Table 131. Oxford Cryosystems Gifford-McMahon Refrigerator Product and Services

Table 132. Oxford Cryosystems Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 133. Oxford Cryosystems Recent Developments/Updates

Table 134. Oxford Cryosystems Competitive Strengths & Weaknesses

Table 135. Beijing Physike Basic Information, Manufacturing Base and Competitors

Table 136. Beijing Physike Major Business

Table 137. Beijing Physike Gifford-McMahon Refrigerator Product and Services

Table 138. Beijing Physike Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 139. Beijing Physike Recent Developments/Updates

Table 140. Beijing Physike Competitive Strengths & Weaknesses

Table 141. Cryogenic Limited Basic Information, Manufacturing Base and Competitors

Table 142. Cryogenic Limited Major Business

Table 143. Cryogenic Limited Gifford-McMahon Refrigerator Product and Services

Table 144. Cryogenic Limited Gifford-McMahon Refrigerator Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 145. Cryogenic Limited Recent Developments/Updates

Table 146. Cryogenic Limited Competitive Strengths & Weaknesses

Table 147. Global Key Players of Gifford-McMahon Refrigerator Upstream (Raw Materials)

Table 148. Global Gifford-McMahon Refrigerator Typical Customers

Table 149. Gifford-McMahon Refrigerator Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Gifford-McMahon Refrigerator Picture

Figure 2. World Gifford-McMahon Refrigerator Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Gifford-McMahon Refrigerator Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Gifford-McMahon Refrigerator Production (2021-2032) & (Units)

Figure 5. World Gifford-McMahon Refrigerator Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Gifford-McMahon Refrigerator Production Value Market Share by Region (2021-2032)

Figure 7. World Gifford-McMahon Refrigerator Production Market Share by Region (2021-2032)

Figure 8. North America Gifford-McMahon Refrigerator Production (2021-2032) & (Units)

Figure 9. Europe Gifford-McMahon Refrigerator Production (2021-2032) & (Units)

Figure 10. China Gifford-McMahon Refrigerator Production (2021-2032) & (Units)

Figure 11. Japan Gifford-McMahon Refrigerator Production (2021-2032) & (Units)

Figure 12. Gifford-McMahon Refrigerator Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 15. World Gifford-McMahon Refrigerator Consumption Market Share by Region (2021-2032)

Figure 16. United States Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 17. China Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 18. Europe Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 19. Japan Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 20. South Korea Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 21. ASEAN Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 22. India Gifford-McMahon Refrigerator Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Gifford-McMahon Refrigerator by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Gifford-McMahon Refrigerator Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Gifford-McMahon Refrigerator Markets in 2025

Figure 26. United States VS China: Gifford-McMahon Refrigerator Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Gifford-McMahon Refrigerator Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Gifford-McMahon Refrigerator Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Gifford-McMahon Refrigerator Production Market Share 2025

Figure 30. China Based Manufacturers Gifford-McMahon Refrigerator Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Gifford-McMahon Refrigerator Production Market Share 2025

Figure 32. World Gifford-McMahon Refrigerator Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Gifford-McMahon Refrigerator Production Value Market Share by Type in 2025

Figure 34. Under 10K or 10K

Figure 35. 10.1K-30K

Figure 36. Above 30K

Figure 37. World Gifford-McMahon Refrigerator Production Market Share by Type (2021-2032)

Figure 38. World Gifford-McMahon Refrigerator Production Value Market Share by Type (2021-2032)

Figure 39. World Gifford-McMahon Refrigerator Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Gifford-McMahon Refrigerator Production Value by Cooling Mechanism, (USD Million), 2021 & 2025 & 2032

Figure 41. World Gifford-McMahon Refrigerator Production Value Market Share by Cooling Mechanism in 2025

Figure 42. Conventional GM Cryocoolers

Figure 43. GM Pulse Tube Cryocoolers

Figure 44. GM-JT Cryocollers

Figure 45. World Gifford-McMahon Refrigerator Production Market Share by Cooling Mechanism (2021-2032)

Figure 46. World Gifford-McMahon Refrigerator Production Value Market Share by Cooling Mechanism (2021-2032)

Figure 47. World Gifford-McMahon Refrigerator Average Price by Cooling Mechanism

(2021-2032) & (K US\$/Unit)

Figure 48. World Gifford-McMahon Refrigerator Production Value by End-Use Industry, (USD Million), 2021 & 2025 & 2032

Figure 49. World Gifford-McMahon Refrigerator Production Value Market Share by End-Use Industry in 2025

Figure 50. Semiconductor and Electronic Device Manufacturing

Figure 51. Medical and Life Sciences

Figure 52. Research and Development

Figure 53. Energy and Superconducting Technology

Figure 54. Industrial Gases and Cryogenic Processing

Figure 55. Others

Figure 56. World Gifford-McMahon Refrigerator Production Market Share by End-Use Industry (2021-2032)

Figure 57. World Gifford-McMahon Refrigerator Production Value Market Share by End-Use Industry (2021-2032)

Figure 58. World Gifford-McMahon Refrigerator Average Price by End-Use Industry (2021-2032) & (K US\$/Unit)

Figure 59. World Gifford-McMahon Refrigerator Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World Gifford-McMahon Refrigerator Production Value Market Share by Application in 2025

Figure 61. MRI and NMR

Figure 62. Scientific Instruments and Laboratory Cryostats

Figure 63. Cryopumps and Vacuum Systems

Figure 64. Others

Figure 65. World Gifford-McMahon Refrigerator Production Market Share by Application (2021-2032)

Figure 66. World Gifford-McMahon Refrigerator Production Value Market Share by Application (2021-2032)

Figure 67. World Gifford-McMahon Refrigerator Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 68. Gifford-McMahon Refrigerator Industry Chain

Figure 69. Gifford-McMahon Refrigerator Procurement Model

Figure 70. Gifford-McMahon Refrigerator Sales Model

Figure 71. Gifford-McMahon Refrigerator Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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