

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market size is expected to reach \$ 1680 million by 2032, rising at a market growth of 22.8% CAGR during the forecast period (2026-2032).

In 2025, global sales of Joule-Thomson throttling refrigeration cryoablation devices reached 476 units, with an average price of \$806,000 per unit.

Cryoablation refers to a method of freezing diseased tissue through low-temperature technology to achieve in situ inactivation of solid tissue. The working principle is to use low temperature to quickly cool down the diseased tissue to destroy cells, causing cell necrosis or apoptosis, thereby achieving the purpose of treatment. Since cryoablation uses the physical method of energy exchange to achieve the purpose of treatment, its trauma and side effects to the human body are much lower than conventional radiotherapy and chemotherapy, so it is hailed as a 'green therapy'.

In the 1990s, Endocare, an American company, developed a new type of cryotherapy equipment using the Joule-Thomson throttling refrigeration principle. The equipment uses argon throttling refrigeration and helium throttling heating rewarming to achieve rapid freezing treatment and rewarming needle removal. It is used for ablation treatment of various solid tumors such as lung cancer and liver cancer. China has become the most active country in the world in clinical research on cryoablation tumors.

The raw material system for these devices falls into two main categories: the main unit and single-use consumables. Core components of the main unit include a high-precision gas control system (pressure sensors, flow control valves, and solenoid valve

assemblies), a touchscreen control unit, vacuum-insulated gas transmission lines, and an aluminum alloy or stainless steel chassis frame. The gas control valve assemblies and sensors require extremely high precision in manufacturing; manufacturers often employ a single-supplier strategy to meet FDA, CE, and NMPA regulatory requirements. As the core consumable, the cryoablation needle comprises materials such as the needle tip (Inconel 625 nickel-chromium alloy for MRI-compatible versions; AISI 316L stainless steel for non-MRI versions), polyurethane catheters, polyoxymethylene (POM) connectors, vacuum insulation materials, and sterile packaging. Additionally, the system requires high-pressure argon and helium cylinders along with pressure-reducing adapters to supply the refrigerants.

Regarding cost structure, this type of equipment follows a classic 'razor-and-blade' business model. Although the main unit sells for hundreds of thousands of dollars, profits are primarily derived from the high-margin single-use cryoablation needles. The end-user price for a needle ranges from approximately 8,000 to 18,800 RMB, while raw material costs (metal needle tubes, polymer catheters, insulation materials, etc.) account for only 10-20% of the selling price. Major cost drivers include precision manufacturing processes (complex procedures such as vacuum-exhaust welding and stepped-hole sealing), investment in sterile production environments, regulatory compliance costs for Class III medical devices (registration, clinical validation, and quality systems), and the amortization of R&D expenses for novel intelligent temperature control algorithms. In terms of the cost breakdown for the main unit, electronic control systems account for approximately 30-40%, precision gas piping for 20-25%, software systems for 15-20%, and the chassis structure for 10-15%. As many key components rely on single-source suppliers, supply chain risk is high; upstream capacity constraints or quality issues can directly impact the production of the complete unit and clinical supply.

This report studies the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device 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 Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device total production and demand, 2021-2032, (Units)

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device total production value, 2021-2032, (USD Million)

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device domestic production, consumption, key domestic manufacturers and share

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device 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 Boston Scientific (US), Metrum Cryoflex (PL), Siemens (DE), ERBE Elektromedizin (DE), AccuTarget MediPharma (CN), 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 Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device 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 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 Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Market, Segmentation by Type:

Liquid Nitrogen

Argon and Helium

Carbon Dioxide and Nitrous Oxide

Others

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Market, Segmentation by Probe Diameter:

1.3-1.5mm

1.7mm

2.4-3.5mm

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Market,
Segmentation by Treatment Method:

Percutaneous Puncture

Laparoscopic/Endoscopic

Global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device Market,
Segmentation by Application:

Tumor Treatment

Heart Treatment

Others

Companies Profiled:

Boston Scientific (US)

Metrum Cryoflex (PL)

Siemens (DE)

ERBE Elektromedizin (DE)

AccuTarget MediPharma (CN)

Key Questions Answered:

1. How big is the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market?

2. What is the demand of the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market?
3. What is the year over year growth of the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market?
4. What is the production and production value of the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market?
5. Who are the key producers in the global Joule-Thomson Throttling Refrigeration Cryotherapy Ablation Device market?
6. What are the growth factors driving the market demand?

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