

Global Liquid Carbon Dioxide Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Liquid Carbon Dioxide market size is expected to reach \$ 10942 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

Liquid carbon dioxide refers to carbon dioxide that has been liquefied under pressurized conditions, often with low-temperature storage, forming a cryogenic, high-pressure industrial gas supply format. Its core value lies in enabling high-density storage and transportation in a relatively small volume while providing stable, continuous supply, and meeting impurity and safety requirements across food and industrial applications through different purity grades. From the supply side, the industry typically uses recovered or by-product CO₂ as feed gas, then conducts dehydration, contaminant removal, and deep purification before liquefaction and storage. The product is delivered to customer sites via tankers or micro-bulk vessels, where on-site cryogenic storage tanks and vaporizers convert liquid to gas on demand and maintain the required pressure and flow. This supports multiple supply modes ranging from small cylinder supply to micro-bulk systems and large-scale bulk delivery. From a functional perspective, liquid CO₂ can be used as an inert, non-flammable shielding gas in welding and metal fabrication; for purging and inerting in chemical and pharmaceutical processes; for beverage carbonation, preservation and modified-atmosphere packaging, and cooling or refrigerated transport in food and beverage; and for pH adjustment and neutralization in water treatment and environmental applications. Commercially, suppliers typically sell liquid CO₂ on a per-ton basis and layer in tank rental, on-site system engineering, operations and maintenance, and safety services, combining gas sales with on-site supply solutions. Key competitive factors include the stability of CO₂ feedstock sources, purification and impurity-control capabilities, distribution radius and cold-chain logistics management, as well as supply reliability and compliance assurance that support customers' continuous operations. In certain

applications, liquid CO₂ may also serve as a working medium for R744-related refrigeration systems or as a source of cryogenic cooling capacity, and can support firefighting and low-temperature laboratory preservation uses. It may also be used in specific semiconductor manufacturing processes such as silicon dioxide chemical vapor deposition.

The demand for liquid carbon dioxide is structurally supported by both food and beverage and industrial manufacturing end markets, with the food grade segment providing a relatively rigid base. In beverage carbonation and filling, food grade CO₂ is difficult to substitute, and its use further extends into food processing for chilling and freezing, modified atmosphere packaging, and cold chain transportation, which helps keep demand resilient even amid macro fluctuations. Industrial demand is more closely tied to operating rates and production cadence, covering shielding gas for welding and metal fabrication as well as inerting and purging in chemical and pharmaceutical processes, so changes in orders and utilization tend to translate more directly into volume and delivery frequency. Many customers exhibit a mix of continuous base load and intermittent peak consumption, and liquid supply is better suited for mid to large users because it offers higher storage density and more stable delivery, thereby accelerating penetration of bulk and micro bulk supply models at plant sites.

The core advantage of liquid carbon dioxide is not only its high density for storage and transportation, but also the continuity and controllability enabled by on site cryogenic storage tanks and vaporization systems. Suppliers deliver via tankers or micro bulk vessels and maintain the required pressure and flow at the customer site, allowing customers to reduce cylinder changeovers, avoid unplanned downtime, lower logistics management burden, and improve operational safety and predictability. As customers place higher priority on continuous operations and risk control, suppliers increasingly bundle gas sales with tank rental, on site system engineering, operations and maintenance, and safety documentation and emergency management, pushing the business model toward integrated supply solutions. As a result, competitive differentiation is shifting away from unit price alone toward feedstock stability, purification and impurity control capability, distribution radius and cold chain logistics management, and on site compliance and reliability that underpin long term contracts and customer stickiness. Beyond traditional food and beverage and manufacturing applications, growth is expected to come from expanded low temperature use cases and the broader momentum behind natural refrigerants. Liquid carbon dioxide supports a range of low temperature functions such as tissue conservation, deep freezing, and fire extinction, and it can also link with dry ice related applications, which strengthens demand in cold chain and process temperature control. Meanwhile, regulatory and

industry trends are accelerating the transition away from high GWP fluorinated refrigerants and encouraging natural refrigerant pathways, and the expansion of the R744 ecosystem is likely to drive incremental demand and supply side capacity build out over the medium to long term. On the production side, supply footprints tend to be located near accessible CO₂ sources and major demand centers; leading industrial gas companies operate multiple production sites in China and offer portfolios spanning industrial to food grade and even electronic grade. On the sales side, demand is typically concentrated in beverage and food processing clusters and manufacturing hubs, where bulk tanker delivery and on site storage tend to be more efficient for industrial parks and large users.

This report studies the global Liquid Carbon Dioxide production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Liquid Carbon Dioxide 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 Liquid Carbon Dioxide that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Liquid Carbon Dioxide total production and demand, 2021-2032, (K MT)

Global Liquid Carbon Dioxide total production value, 2021-2032, (USD Million)

Global Liquid Carbon Dioxide production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Liquid Carbon Dioxide consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Liquid Carbon Dioxide domestic production, consumption, key domestic manufacturers and share

Global Liquid Carbon Dioxide production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Liquid Carbon Dioxide production by Type, production, value, CAGR,

2021-2032, (USD Million) & (K MT)

Global Liquid Carbon Dioxide production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Liquid Carbon Dioxide 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 Linde, Air Liquide, Air Products, Messer Group, SIAD, SOL Group, Coregas, Gulf Cryo, Iwatani, India Glycols, 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 Liquid Carbon Dioxide market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Liquid Carbon Dioxide Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Liquid Carbon Dioxide Market, Segmentation by Type:

Medical Grade Carbon Dioxide

Industrial Grade Carbon Dioxide

Food Grade Carbon Dioxide

Global Liquid Carbon Dioxide Market, Segmentation by CO2 Feedstock Source Type:

Natural Sources

Fermentation By-product

Chemical & Petrochemical By-product

Global Liquid Carbon Dioxide Market, Segmentation by Supply Mode:

Cylinders & Bundles

Micro-bulk

Bulk Tanker Delivery & On-site Storage Tank

Global Liquid Carbon Dioxide Market, Segmentation by Application:

Metals Industry

Chemicals and Petroleum Industries

Rubber and Plastics Industries

Food and Beverages Industries

Pharmaceuticals Industry

Environmental Uses

Companies Profiled:

Linde

Air Liquide

Air Products

Messer Group

SIAD

SOL Group

Coregas

Gulf Cryo

Iwatani

India Glycols

Continental Carbonic Products

Matheson Tri-Gas

Hunan Kaimeite Gases

Taiyo Nippon Sanso

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Liquid Carbon Dioxide Production Value by Manufacturer (2021-2026)

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

4.4.2 United States Based Manufacturers Liquid Carbon Dioxide Production Value (2021-2026)

4.4.3 United States Based Manufacturers Liquid Carbon Dioxide Production (2021-2026)

4.5 China Based Liquid Carbon Dioxide Manufacturers and Market Share

4.5.1 China Based Liquid Carbon Dioxide Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Liquid Carbon Dioxide Production Value (2021-2026)

4.5.3 China Based Manufacturers Liquid Carbon Dioxide Production (2021-2026)

4.6 Rest of World Based Liquid Carbon Dioxide Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Liquid Carbon Dioxide Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Liquid Carbon Dioxide Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Liquid Carbon Dioxide Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Liquid Carbon Dioxide Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Medical Grade Carbon Dioxide

5.2.2 Industrial Grade Carbon Dioxide

5.2.3 Food Grade Carbon Dioxide

5.3 Market Segment by Type

5.3.1 World Liquid Carbon Dioxide Production by Type (2021-2032)

5.3.2 World Liquid Carbon Dioxide Production Value by Type (2021-2032)

5.3.3 World Liquid Carbon Dioxide Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CO₂ FEEDSTOCK SOURCE TYPE

6.1 World Liquid Carbon Dioxide Market Size Overview by CO₂ Feedstock Source Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by CO₂ Feedstock Source Type

6.2.1 Natural Sources

6.2.2 Fermentation By-product

- 6.2.3 Chemical & Petrochemical By-product
- 6.3 Market Segment by CO2 Feedstock Source Type
 - 6.3.1 World Liquid Carbon Dioxide Production by CO2 Feedstock Source Type (2021-2032)
 - 6.3.2 World Liquid Carbon Dioxide Production Value by CO2 Feedstock Source Type (2021-2032)
 - 6.3.3 World Liquid Carbon Dioxide Average Price by CO2 Feedstock Source Type (2021-2032)

7 MARKET ANALYSIS BY SUPPLY MODE

- 7.1 World Liquid Carbon Dioxide Market Size Overview by Supply Mode: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Supply Mode
 - 7.2.1 Cylinders & Bundles
 - 7.2.2 Micro-bulk
 - 7.2.3 Bulk Tanker Delivery & On-site Storage Tank
- 7.3 Market Segment by Supply Mode
 - 7.3.1 World Liquid Carbon Dioxide Production by Supply Mode (2021-2032)
 - 7.3.2 World Liquid Carbon Dioxide Production Value by Supply Mode (2021-2032)
 - 7.3.3 World Liquid Carbon Dioxide Average Price by Supply Mode (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Liquid Carbon Dioxide Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Metals Industry
 - 8.2.2 Chemicals and Petroleum Industries
 - 8.2.3 Rubber and Plastics Industries
 - 8.2.4 Food and Beverages Industries
 - 8.2.5 Pharmaceuticals Industry
 - 8.2.6 Environmental Uses
- 8.3 Market Segment by Application
 - 8.3.1 World Liquid Carbon Dioxide Production by Application (2021-2032)
 - 8.3.2 World Liquid Carbon Dioxide Production Value by Application (2021-2032)
 - 8.3.3 World Liquid Carbon Dioxide Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Linde

9.1.1 Linde Details

9.1.2 Linde Major Business

9.1.3 Linde Liquid Carbon Dioxide Product and Services

9.1.4 Linde Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Linde Recent Developments/Updates

9.1.6 Linde Competitive Strengths & Weaknesses

9.2 Air Liquide

9.2.1 Air Liquide Details

9.2.2 Air Liquide Major Business

9.2.3 Air Liquide Liquid Carbon Dioxide Product and Services

9.2.4 Air Liquide Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Air Liquide Recent Developments/Updates

9.2.6 Air Liquide Competitive Strengths & Weaknesses

9.3 Air Products

9.3.1 Air Products Details

9.3.2 Air Products Major Business

9.3.3 Air Products Liquid Carbon Dioxide Product and Services

9.3.4 Air Products Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Air Products Recent Developments/Updates

9.3.6 Air Products Competitive Strengths & Weaknesses

9.4 Messer Group

9.4.1 Messer Group Details

9.4.2 Messer Group Major Business

9.4.3 Messer Group Liquid Carbon Dioxide Product and Services

9.4.4 Messer Group Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Messer Group Recent Developments/Updates

9.4.6 Messer Group Competitive Strengths & Weaknesses

9.5 SIAD

9.5.1 SIAD Details

9.5.2 SIAD Major Business

9.5.3 SIAD Liquid Carbon Dioxide Product and Services

9.5.4 SIAD Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.5.5 SIAD Recent Developments/Updates
- 9.5.6 SIAD Competitive Strengths & Weaknesses
- 9.6 SOL Group
 - 9.6.1 SOL Group Details
 - 9.6.2 SOL Group Major Business
 - 9.6.3 SOL Group Liquid Carbon Dioxide Product and Services
 - 9.6.4 SOL Group Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 SOL Group Recent Developments/Updates
 - 9.6.6 SOL Group Competitive Strengths & Weaknesses
- 9.7 Coregas
 - 9.7.1 Coregas Details
 - 9.7.2 Coregas Major Business
 - 9.7.3 Coregas Liquid Carbon Dioxide Product and Services
 - 9.7.4 Coregas Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Coregas Recent Developments/Updates
 - 9.7.6 Coregas Competitive Strengths & Weaknesses
- 9.8 Gulf Cryo
 - 9.8.1 Gulf Cryo Details
 - 9.8.2 Gulf Cryo Major Business
 - 9.8.3 Gulf Cryo Liquid Carbon Dioxide Product and Services
 - 9.8.4 Gulf Cryo Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Gulf Cryo Recent Developments/Updates
 - 9.8.6 Gulf Cryo Competitive Strengths & Weaknesses
- 9.9 Iwatani
 - 9.9.1 Iwatani Details
 - 9.9.2 Iwatani Major Business
 - 9.9.3 Iwatani Liquid Carbon Dioxide Product and Services
 - 9.9.4 Iwatani Liquid Carbon Dioxide Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Iwatani Recent Developments/Updates
 - 9.9.6 Iwatani Competitive Strengths & Weaknesses
- 9.10 India Glycols
 - 9.10.1 India Glycols Details
 - 9.10.2 India Glycols Major Business
 - 9.10.3 India Glycols Liquid Carbon Dioxide Product and Services
 - 9.10.4 India Glycols Liquid Carbon Dioxide Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.10.5 India Glycols Recent Developments/Updates

9.10.6 India Glycols Competitive Strengths & Weaknesses

9.11 Continental Carbonic Products

9.11.1 Continental Carbonic Products Details

9.11.2 Continental Carbonic Products Major Business

9.11.3 Continental Carbonic Products Liquid Carbon Dioxide Product and Services

9.11.4 Continental Carbonic Products Liquid Carbon Dioxide Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.11.5 Continental Carbonic Products Recent Developments/Updates

9.11.6 Continental Carbonic Products Competitive Strengths & Weaknesses

9.12 Matheson Tri-Gas

9.12.1 Matheson Tri-Gas Details

9.12.2 Matheson Tri-Gas Major Business

9.12.3 Matheson Tri-Gas Liquid Carbon Dioxide Product and Services

9.12.4 Matheson Tri-Gas Liquid Carbon Dioxide Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.12.5 Matheson Tri-Gas Recent Developments/Updates

9.12.6 Matheson Tri-Gas Competitive Strengths & Weaknesses

9.13 Hunan Kaimeite Gases

9.13.1 Hunan Kaimeite Gases Details

9.13.2 Hunan Kaimeite Gases Major Business

9.13.3 Hunan Kaimeite Gases Liquid Carbon Dioxide Product and Services

9.13.4 Hunan Kaimeite Gases Liquid Carbon Dioxide Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.13.5 Hunan Kaimeite Gases Recent Developments/Updates

9.13.6 Hunan Kaimeite Gases Competitive Strengths & Weaknesses

9.14 Taiyo Nippon Sanso

9.14.1 Taiyo Nippon Sanso Details

9.14.2 Taiyo Nippon Sanso Major Business

9.14.3 Taiyo Nippon Sanso Liquid Carbon Dioxide Product and Services

9.14.4 Taiyo Nippon Sanso Liquid Carbon Dioxide Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.14.5 Taiyo Nippon Sanso Recent Developments/Updates

9.14.6 Taiyo Nippon Sanso Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Liquid Carbon Dioxide Industry Chain

10.2 Liquid Carbon Dioxide Upstream Analysis

10.2.1 Liquid Carbon Dioxide Core Raw Materials

10.2.2 Main Manufacturers of Liquid Carbon Dioxide Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Liquid Carbon Dioxide Production Mode

10.6 Liquid Carbon Dioxide Procurement Model

10.7 Liquid Carbon Dioxide Industry Sales Model and Sales Channels

10.7.1 Liquid Carbon Dioxide Sales Model

10.7.2 Liquid Carbon Dioxide 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 Liquid Carbon Dioxide Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Liquid Carbon Dioxide Production Value by Region (2021-2026) & (USD Million)

Table 3. World Liquid Carbon Dioxide Production Value by Region (2027-2032) & (USD Million)

Table 4. World Liquid Carbon Dioxide Production Value Market Share by Region (2021-2026)

Table 5. World Liquid Carbon Dioxide Production Value Market Share by Region (2027-2032)

Table 6. World Liquid Carbon Dioxide Production by Region (2021-2026) & (K MT)

Table 7. World Liquid Carbon Dioxide Production by Region (2027-2032) & (K MT)

Table 8. World Liquid Carbon Dioxide Production Market Share by Region (2021-2026)

Table 9. World Liquid Carbon Dioxide Production Market Share by Region (2027-2032)

Table 10. World Liquid Carbon Dioxide Average Price by Region (2021-2026) & (USD/MT)

Table 11. World Liquid Carbon Dioxide Average Price by Region (2027-2032) & (USD/MT)

Table 12. Liquid Carbon Dioxide Major Market Trends

Table 13. World Liquid Carbon Dioxide Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K MT)

Table 14. World Liquid Carbon Dioxide Consumption by Region (2021-2026) & (K MT)

Table 15. World Liquid Carbon Dioxide Consumption Forecast by Region (2027-2032) & (K MT)

Table 16. World Liquid Carbon Dioxide Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Liquid Carbon Dioxide Producers in 2025

Table 18. World Liquid Carbon Dioxide Production by Manufacturer (2021-2026) & (K MT)

Table 19. Production Market Share of Key Liquid Carbon Dioxide Producers in 2025

Table 20. World Liquid Carbon Dioxide Average Price by Manufacturer (2021-2026) & (USD/MT)

Table 21. Global Liquid Carbon Dioxide Company Evaluation Quadrant

Table 22. World Liquid Carbon Dioxide Industry Rank of Major Manufacturers, Based on

Production Value in 2025

Table 23. Head Office and Liquid Carbon Dioxide Production Site of Key Manufacturer

Table 24. Liquid Carbon Dioxide Market: Company Product Type Footprint

Table 25. Liquid Carbon Dioxide Market: Company Product Application Footprint

Table 26. Liquid Carbon Dioxide Competitive Factors

Table 27. Liquid Carbon Dioxide New Entrant and Capacity Expansion Plans

Table 28. Liquid Carbon Dioxide Mergers & Acquisitions Activity

Table 29. United States VS China Liquid Carbon Dioxide Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Liquid Carbon Dioxide Production Comparison, (2021 & 2025 & 2032) & (K MT)

Table 31. United States VS China Liquid Carbon Dioxide Consumption Comparison, (2021 & 2025 & 2032) & (K MT)

Table 32. United States Based Liquid Carbon Dioxide Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Liquid Carbon Dioxide Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Liquid Carbon Dioxide Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Liquid Carbon Dioxide Production (2021-2026) & (K MT)

Table 36. United States Based Manufacturers Liquid Carbon Dioxide Production Market Share (2021-2026)

Table 37. China Based Liquid Carbon Dioxide Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Liquid Carbon Dioxide Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Liquid Carbon Dioxide Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Liquid Carbon Dioxide Production, (2021-2026) & (K MT)

Table 41. China Based Manufacturers Liquid Carbon Dioxide Production Market Share (2021-2026)

Table 42. Rest of World Based Liquid Carbon Dioxide Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Liquid Carbon Dioxide Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Liquid Carbon Dioxide Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Liquid Carbon Dioxide Production, (2021-2026) & (K MT)

Table 46. Rest of World Based Manufacturers Liquid Carbon Dioxide Production Market Share (2021-2026)

Table 47. World Liquid Carbon Dioxide Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Liquid Carbon Dioxide Production by Type (2021-2026) & (K MT)

Table 49. World Liquid Carbon Dioxide Production by Type (2027-2032) & (K MT)

Table 50. World Liquid Carbon Dioxide Production Value by Type (2021-2026) & (USD Million)

Table 51. World Liquid Carbon Dioxide Production Value by Type (2027-2032) & (USD Million)

Table 52. World Liquid Carbon Dioxide Average Price by Type (2021-2026) & (USD/MT)

Table 53. World Liquid Carbon Dioxide Average Price by Type (2027-2032) & (USD/MT)

Table 54. World Liquid Carbon Dioxide Production Value by CO2 Feedstock Source Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Liquid Carbon Dioxide Production by CO2 Feedstock Source Type (2021-2026) & (K MT)

Table 56. World Liquid Carbon Dioxide Production by CO2 Feedstock Source Type (2027-2032) & (K MT)

Table 57. World Liquid Carbon Dioxide Production Value by CO2 Feedstock Source Type (2021-2026) & (USD Million)

Table 58. World Liquid Carbon Dioxide Production Value by CO2 Feedstock Source Type (2027-2032) & (USD Million)

Table 59. World Liquid Carbon Dioxide Average Price by CO2 Feedstock Source Type (2021-2026) & (USD/MT)

Table 60. World Liquid Carbon Dioxide Average Price by CO2 Feedstock Source Type (2027-2032) & (USD/MT)

Table 61. World Liquid Carbon Dioxide Production Value by Supply Mode, (USD Million), 2021 & 2025 & 2032

Table 62. World Liquid Carbon Dioxide Production by Supply Mode (2021-2026) & (K MT)

Table 63. World Liquid Carbon Dioxide Production by Supply Mode (2027-2032) & (K MT)

Table 64. World Liquid Carbon Dioxide Production Value by Supply Mode (2021-2026) & (USD Million)

Table 65. World Liquid Carbon Dioxide Production Value by Supply Mode (2027-2032)

& (USD Million)

Table 66. World Liquid Carbon Dioxide Average Price by Supply Mode (2021-2026) & (USD/MT)

Table 67. World Liquid Carbon Dioxide Average Price by Supply Mode (2027-2032) & (USD/MT)

Table 68. World Liquid Carbon Dioxide Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Liquid Carbon Dioxide Production by Application (2021-2026) & (K MT)

Table 70. World Liquid Carbon Dioxide Production by Application (2027-2032) & (K MT)

Table 71. World Liquid Carbon Dioxide Production Value by Application (2021-2026) & (USD Million)

Table 72. World Liquid Carbon Dioxide Production Value by Application (2027-2032) & (USD Million)

Table 73. World Liquid Carbon Dioxide Average Price by Application (2021-2026) & (USD/MT)

Table 74. World Liquid Carbon Dioxide Average Price by Application (2027-2032) & (USD/MT)

Table 75. Linde Basic Information, Manufacturing Base and Competitors

Table 76. Linde Major Business

Table 77. Linde Liquid Carbon Dioxide Product and Services

Table 78. Linde Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Linde Recent Developments/Updates

Table 80. Linde Competitive Strengths & Weaknesses

Table 81. Air Liquide Basic Information, Manufacturing Base and Competitors

Table 82. Air Liquide Major Business

Table 83. Air Liquide Liquid Carbon Dioxide Product and Services

Table 84. Air Liquide Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Air Liquide Recent Developments/Updates

Table 86. Air Liquide Competitive Strengths & Weaknesses

Table 87. Air Products Basic Information, Manufacturing Base and Competitors

Table 88. Air Products Major Business

Table 89. Air Products Liquid Carbon Dioxide Product and Services

Table 90. Air Products Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Air Products Recent Developments/Updates

Table 92. Air Products Competitive Strengths & Weaknesses

Table 93. Messer Group Basic Information, Manufacturing Base and Competitors

- Table 94. Messer Group Major Business
- Table 95. Messer Group Liquid Carbon Dioxide Product and Services
- Table 96. Messer Group Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Messer Group Recent Developments/Updates
- Table 98. Messer Group Competitive Strengths & Weaknesses
- Table 99. SIAD Basic Information, Manufacturing Base and Competitors
- Table 100. SIAD Major Business
- Table 101. SIAD Liquid Carbon Dioxide Product and Services
- Table 102. SIAD Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. SIAD Recent Developments/Updates
- Table 104. SIAD Competitive Strengths & Weaknesses
- Table 105. SOL Group Basic Information, Manufacturing Base and Competitors
- Table 106. SOL Group Major Business
- Table 107. SOL Group Liquid Carbon Dioxide Product and Services
- Table 108. SOL Group Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. SOL Group Recent Developments/Updates
- Table 110. SOL Group Competitive Strengths & Weaknesses
- Table 111. Coregas Basic Information, Manufacturing Base and Competitors
- Table 112. Coregas Major Business
- Table 113. Coregas Liquid Carbon Dioxide Product and Services
- Table 114. Coregas Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Coregas Recent Developments/Updates
- Table 116. Coregas Competitive Strengths & Weaknesses
- Table 117. Gulf Cryo Basic Information, Manufacturing Base and Competitors
- Table 118. Gulf Cryo Major Business
- Table 119. Gulf Cryo Liquid Carbon Dioxide Product and Services
- Table 120. Gulf Cryo Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Gulf Cryo Recent Developments/Updates
- Table 122. Gulf Cryo Competitive Strengths & Weaknesses
- Table 123. Iwatani Basic Information, Manufacturing Base and Competitors
- Table 124. Iwatani Major Business
- Table 125. Iwatani Liquid Carbon Dioxide Product and Services
- Table 126. Iwatani Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 127. Iwatani Recent Developments/Updates
- Table 128. Iwatani Competitive Strengths & Weaknesses
- Table 129. India Glycols Basic Information, Manufacturing Base and Competitors
- Table 130. India Glycols Major Business
- Table 131. India Glycols Liquid Carbon Dioxide Product and Services
- Table 132. India Glycols Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. India Glycols Recent Developments/Updates
- Table 134. India Glycols Competitive Strengths & Weaknesses
- Table 135. Continental Carbonic Products Basic Information, Manufacturing Base and Competitors
- Table 136. Continental Carbonic Products Major Business
- Table 137. Continental Carbonic Products Liquid Carbon Dioxide Product and Services
- Table 138. Continental Carbonic Products Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Continental Carbonic Products Recent Developments/Updates
- Table 140. Continental Carbonic Products Competitive Strengths & Weaknesses
- Table 141. Matheson Tri-Gas Basic Information, Manufacturing Base and Competitors
- Table 142. Matheson Tri-Gas Major Business
- Table 143. Matheson Tri-Gas Liquid Carbon Dioxide Product and Services
- Table 144. Matheson Tri-Gas Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Matheson Tri-Gas Recent Developments/Updates
- Table 146. Matheson Tri-Gas Competitive Strengths & Weaknesses
- Table 147. Hunan Kaimeite Gases Basic Information, Manufacturing Base and Competitors
- Table 148. Hunan Kaimeite Gases Major Business
- Table 149. Hunan Kaimeite Gases Liquid Carbon Dioxide Product and Services
- Table 150. Hunan Kaimeite Gases Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Hunan Kaimeite Gases Recent Developments/Updates
- Table 152. Hunan Kaimeite Gases Competitive Strengths & Weaknesses
- Table 153. Taiyo Nippon Sanso Basic Information, Manufacturing Base and Competitors
- Table 154. Taiyo Nippon Sanso Major Business
- Table 155. Taiyo Nippon Sanso Liquid Carbon Dioxide Product and Services

Table 156. Taiyo Nippon Sanso Liquid Carbon Dioxide Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Taiyo Nippon Sanso Recent Developments/Updates

Table 158. Taiyo Nippon Sanso Competitive Strengths & Weaknesses

Table 159. Global Key Players of Liquid Carbon Dioxide Upstream (Raw Materials)

Table 160. Global Liquid Carbon Dioxide Typical Customers

Table 161. Liquid Carbon Dioxide Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Liquid Carbon Dioxide Picture

Figure 2. World Liquid Carbon Dioxide Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Liquid Carbon Dioxide Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Liquid Carbon Dioxide Production (2021-2032) & (K MT)

Figure 5. World Liquid Carbon Dioxide Average Price (2021-2032) & (USD/MT)

Figure 6. World Liquid Carbon Dioxide Production Value Market Share by Region (2021-2032)

Figure 7. World Liquid Carbon Dioxide Production Market Share by Region (2021-2032)

Figure 8. North America Liquid Carbon Dioxide Production (2021-2032) & (K MT)

Figure 9. Europe Liquid Carbon Dioxide Production (2021-2032) & (K MT)

Figure 10. China Liquid Carbon Dioxide Production (2021-2032) & (K MT)

Figure 11. Japan Liquid Carbon Dioxide Production (2021-2032) & (K MT)

Figure 12. Liquid Carbon Dioxide Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 15. World Liquid Carbon Dioxide Consumption Market Share by Region (2021-2032)

Figure 16. United States Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 17. China Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 18. Europe Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 19. Japan Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 20. South Korea Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 21. ASEAN Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

Figure 22. India Liquid Carbon Dioxide Consumption (2021-2032) & (K MT)

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

Figure 24. Global Four-firm Concentration Ratios (CR4) for Liquid Carbon Dioxide Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Liquid Carbon Dioxide Markets in 2025

Figure 26. United States VS China: Liquid Carbon Dioxide Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Liquid Carbon Dioxide Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Liquid Carbon Dioxide Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Liquid Carbon Dioxide Production Market Share 2025

Figure 30. China Based Manufacturers Liquid Carbon Dioxide Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Liquid Carbon Dioxide Production Market Share 2025

Figure 32. World Liquid Carbon Dioxide Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Liquid Carbon Dioxide Production Value Market Share by Type in 2025

Figure 34. Medical Grade Carbon Dioxide

Figure 35. Industrial Grade Carbon Dioxide

Figure 36. Food Grade Carbon Dioxide

Figure 37. World Liquid Carbon Dioxide Production Market Share by Type (2021-2032)

Figure 38. World Liquid Carbon Dioxide Production Value Market Share by Type (2021-2032)

Figure 39. World Liquid Carbon Dioxide Average Price by Type (2021-2032) & (USD/MT)

Figure 40. World Liquid Carbon Dioxide Production Value by CO₂ Feedstock Source Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World Liquid Carbon Dioxide Production Value Market Share by CO₂ Feedstock Source Type in 2025

Figure 42. Natural Sources

Figure 43. Fermentation By-product

Figure 44. Chemical & Petrochemical By-product

Figure 45. World Liquid Carbon Dioxide Production Market Share by CO₂ Feedstock Source Type (2021-2032)

Figure 46. World Liquid Carbon Dioxide Production Value Market Share by CO₂ Feedstock Source Type (2021-2032)

Figure 47. World Liquid Carbon Dioxide Average Price by CO₂ Feedstock Source Type (2021-2032) & (USD/MT)

Figure 48. World Liquid Carbon Dioxide Production Value by Supply Mode, (USD Million), 2021 & 2025 & 2032

Figure 49. World Liquid Carbon Dioxide Production Value Market Share by Supply Mode in 2025

Figure 50. Cylinders & Bundles

Figure 51. Micro-bulk

Figure 52. Bulk Tanker Delivery & On-site Storage Tank

Figure 53. World Liquid Carbon Dioxide Production Market Share by Supply Mode (2021-2032)

Figure 54. World Liquid Carbon Dioxide Production Value Market Share by Supply Mode (2021-2032)

Figure 55. World Liquid Carbon Dioxide Average Price by Supply Mode (2021-2032) & (USD/MT)

Figure 56. World Liquid Carbon Dioxide Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Liquid Carbon Dioxide Production Value Market Share by Application in 2025

Figure 58. Metals Industry

Figure 59. Chemicals and Petroleum Industries

Figure 60. Rubber and Plastics Industries

Figure 61. Food and Beverages Industries

Figure 62. Pharmaceuticals Industry

Figure 63. Environmental Uses

Figure 64. World Liquid Carbon Dioxide Production Market Share by Application (2021-2032)

Figure 65. World Liquid Carbon Dioxide Production Value Market Share by Application (2021-2032)

Figure 66. World Liquid Carbon Dioxide Average Price by Application (2021-2032) & (USD/MT)

Figure 67. Liquid Carbon Dioxide Industry Chain

Figure 68. Liquid Carbon Dioxide Procurement Model

Figure 69. Liquid Carbon Dioxide Sales Model

Figure 70. Liquid Carbon Dioxide Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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