

# Global Medical Gases Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GD2435D1B7FFEN.html>

Date: January 2026

Pages: 117

Price: US\$ 4,480.00 (Single User License)

ID: GD2435D1B7FFEN

## Abstracts

The global Medical Gases market size is expected to reach \$ 8594 million by 2032, rising at a market growth of 2.3% CAGR during the forecast period (2026-2032).

Medical gases refer to gases and medically approved gas mixtures used in hospitals and home-care settings for treatment, diagnosis, analgesia and anesthesia, and life support. They include both medicinal gases that act pharmacologically to correct or regulate physiological functions and medical device gases that provide a physical medium for specific clinical procedures. Typical categories cover medical oxygen, medical air, nitrous oxide, and a wide range of mixed gases involving oxygen, nitrogen, helium, and carbon dioxide. They also include carbon dioxide for insufflation in laparoscopic and endoscopic procedures and for certain cryotherapy applications, nitrogen for cryopreservation and cryotherapy, and argon for surgical applications such as argon plasma coagulation, underscoring the foundational role of medical gases in respiratory support and oxygen therapy, analgesia and anesthesia, creation of working cavities in minimally invasive surgery, and cryotherapy and specimen preservation. Medical gases require end-to-end quality control from production to final delivery. Core gases such as oxygen are typically produced by air separation, either through cryogenic distillation to obtain high-purity oxygen and related products or through on-site PSA oxygen generation solutions to ensure stable supply in medical settings. Industry practice is to manage production, filling, storage, transportation, and release under pharmaceutical GMP systems, with batch segregation, in-process monitoring, and finished-product testing to ensure compliance with pharmacopeial or approved specifications. Cylinders and cryogenic vessels are managed as dedicated assets with anti-mix-up controls. Returned cylinders undergo validated evacuation or purge procedures to reduce contamination risk. Prior to filling, cylinders are subject to external and internal inspection, residual-pressure verification, valve and connector compatibility

checks, leak testing, and tamper-evident sealing and standardized labeling. Each cylinder is traceable to key production and filling information, supported by verifiable test records or certificates of analysis. From a delivery perspective, medical gases are not only the product itself but also a continuously reliable supply solution, commonly provided via cylinders, dewars, manifolds, and emergency supply services, and supported by hospital medical gas pipeline systems and engineered delivery and operations in critical areas such as operating rooms and ICUs to ensure continuity and safety of clinical gas supply.

The core competition in the medical gases industry is not simply selling gases, but delivering end-to-end supply capability built on pharmaceutical-grade compliance and quality management. From upstream production to filling, storage, transportation, release, and traceability, suppliers must operate under strict batch control, in-process monitoring, finished-product testing, anti-mix-up measures, and dedicated cylinder and cryogenic vessel management. A verifiable documentation system and certificates are essential to guarantee clinical safety, supply stability, and full traceability, which together constitute the key entry barrier for serving hospital systems on a long-term basis.

Product offerings show a clear tiered structure in which large-volume base gases coexist with higher-value specialty gases and medical mixtures. Medical oxygen, medical air, carbon dioxide, and nitrogen form the broadest and most rigid demand base, supporting high-frequency applications such as respiratory support and oxygen therapy, insufflation for minimally invasive procedures, cryotherapy, and equipment-related uses. Meanwhile, nitrous oxide and its mixtures, heliox, and inhaled nitric oxide-related mixtures are tied to specific clinical indications and treatment pathways. Differentiation is achieved through formulation, specifications, and regulatory approvals, making these products an important route to improve unit value and deepen clinical penetration.

Medical gases function as a combined industry of continuous gas supply services and engineered systems, tightly integrated with hospital use scenarios. Common delivery modes include cylinders, dewars, manifolds, and emergency supply services, supported by hospital medical gas pipeline systems and engineered delivery and operations in critical areas such as operating rooms and ICUs. This integrated product-system-service loop increases customer stickiness and switching costs. On the supply side, large-scale cryogenic air separation and on-site PSA oxygen generation work together to form a resilient supply architecture, ensuring stable routine supply while strengthening continuity and emergency readiness for medical facilities.

This report studies the global Medical Gases production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Medical Gases total production and demand, 2021-2032, (K MT)

Global Medical Gases total production value, 2021-2032, (USD Million)

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

Global Medical Gases consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Medical Gases domestic production, consumption, key domestic manufacturers and share

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

Global Medical Gases production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Medical Gases production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Medical Gases 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 Air Liquide, Linde plc, Air Products & Chemicals, Taiyo Nippon Sanso Corporation, Messer Group, Guangdong Huate Gas Co., Ltd., INOX Air Products Pvt. Ltd., White Martins, SOL Group (SOL S.p.A.), AIR WATER INC., 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 Medical Gases 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 Medical Gases Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

**Global Medical Gases Market, Segmentation by Type:**

Medical Oxygen

Medical Nitrous Oxide

Medical Air

Medical Helium

Others

Global Medical Gases Market, Segmentation by Ingredients:

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Global Medical Gases Market, Segmentation by Craft:

Cryogenic air separation (ASU) production

On-site generation via PSA/VPSA

Gas blending and medical mixture preparation

Others

Global Medical Gases Market, Segmentation by Application:

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Companies Profiled:

Air Liquide

Linde plc

Air Products & Chemicals

Taiyo Nippon Sanso Corporation

Messer Group

Guangdong Huate Gas Co., Ltd.

INOX Air Products Pvt. Ltd.

White Martins

SOL Group (SOL S.p.A.)

AIR WATER INC.

Shenzhen Gaofa Gas Co., Ltd.

**Key Questions Answered:**

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

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