

Global Phase Change Refrigeration Cryotherapy Ablation Device Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phase Change Refrigeration Cryotherapy Ablation Device market size is expected to reach \$ 1042 million by 2032, rising at a market growth of 29.4% CAGR during the forecast period (2026-2032).

In 2025, global sales of phase-change refrigeration cryoablation devices reached 330 units, with an average price of \$516,000 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'.

Traditional cryoablation equipment needs to be connected to high-pressure argon and helium cylinders when used, and the whole set of equipment becomes large and cumbersome. It is necessary to prepare a special warehouse to store a large number of gas cylinders. It is very inconvenient to use in hospitals where every inch of land is valuable, which affects its promotion and use. The new cryoablation adopts phase change heat transfer technology, selects liquid nitrogen and anhydrous ethanol vapor as phase change heat transfer media, can adopt a simple integrated design, and operate at low pressure. The working pressure of traditional cryoablation equipment is hundreds of atmospheres, and the working pressure of the new cryoablation is below 10 atmospheres, which is highly safe.

These devices utilize liquid nitrogen or specialized phase-change working fluids (such as anhydrous ethanol or Freon substitutes) as the cooling medium. The core material components include: the main unit comprising the phase-change fluid storage and circulation system (liquid nitrogen Dewar/self-pressurizing tank, cryogenic pump, phase-change heat exchanger), the intelligent temperature control and monitoring system (temperature sensors, pressure sensors, PLC controllers), vacuum-insulated transfer lines, and a stainless steel or aluminum alloy chassis; and disposable consumables comprising phase-change ablation needles (featuring stainless steel or Nitinol needle shafts with internal phase-change chambers and capillary structures), polyurethane or silicone catheters, polyoxymethylene (POM) connectors, and sterile packaging. Compared to Joule-Thomson gas-based systems, phase-change refrigeration eliminates the need for high-pressure argon/helium cylinders and associated high-pressure piping, significantly reducing raw material costs for the gas supply system; however, it imposes stricter requirements regarding the purity of the phase-change fluid, the sealing integrity of the cryogenic pump, and the heat transfer efficiency of the heat exchanger.

Regarding cost structure, the phase-change fluid circulation system (liquid nitrogen tank, cryogenic pump, heat exchanger) accounts for approximately 35-45% of the main unit's cost, the temperature control and monitoring system for about 20-25%, and the insulated piping and chassis for roughly 15-20%. Due to their internal phase-change chambers and capillary structures, the manufacturing complexity of the disposable ablation needles is comparable to that of gas-based needles; their retail price ranges from 8,000 to 15,000 RMB per unit, with raw material costs representing approximately 12-18% of the total. The core cost advantage of the phase-change cooling approach lies in operations: the unit price of liquid nitrogen is approximately 0.5-1.5 RMB/liter, far lower than the ongoing procurement costs for argon or helium, and it eliminates the need for specialized high-pressure gas cylinder storage facilities, thereby reducing hospital infrastructure investment by 30-50%. However, a disadvantage is the evaporative loss associated with liquid nitrogen storage (a daily evaporation rate of about 1-3%), which places high demands on the stability of the hospital's liquid nitrogen supply chain. Overall, while the initial purchase cost of the main unit for phase-change cooling equipment may be comparable to or slightly lower than that of gas-based systems, the simplification of the gas supply infrastructure and reduced reliance on consumables can lower the total lifecycle cost (over 5-8 years) by approximately 20-35%, making it highly cost-competitive for primary care hospitals and emerging markets.

This report studies the global Phase Change Refrigeration Cryotherapy Ablation Device production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Phase Change Refrigeration Cryotherapy Ablation Device total production and demand, 2021-2032, (Units)

Global Phase Change Refrigeration Cryotherapy Ablation Device total production value, 2021-2032, (USD Million)

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

Global Phase Change Refrigeration Cryotherapy Ablation Device consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Phase Change Refrigeration Cryotherapy Ablation Device domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Phase Change 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 Icecure Medical (IL), Hygea Beijing (CN), STERIS (US), 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 Phase Change 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 Phase Change Refrigeration Cryotherapy Ablation Device Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Phase Change Refrigeration Cryotherapy Ablation Device Market, Segmentation by Type:

Liquid Nitrogen

Argon and Helium

Carbon Dioxide and Nitrous Oxide

Others

Global Phase Change Refrigeration Cryotherapy Ablation Device Market, Segmentation by Probe Diameter:

1.3-1.5mm

1.7mm

2.4-3.5mm

Global Phase Change Refrigeration Cryotherapy Ablation Device Market, Segmentation by Image Guidance Method:

CT-guided

Ultrasound-guided

MRI-guided

Global Phase Change Refrigeration Cryotherapy Ablation Device Market, Segmentation by Application:

Tumor Treatment

Heart Treatment

Others

Companies Profiled:

Icecure Medical (IL)

Hygea Beijing (CN)

STERIS (US)

Key Questions Answered:

1. How big is the global Phase Change Refrigeration Cryotherapy Ablation Device market?
2. What is the demand of the global Phase Change Refrigeration Cryotherapy Ablation Device market?
3. What is the year over year growth of the global Phase Change Refrigeration Cryotherapy Ablation Device market?
4. What is the production and production value of the global Phase Change Refrigeration Cryotherapy Ablation Device market?
5. Who are the key producers in the global Phase Change Refrigeration Cryotherapy Ablation Device market?
6. What are the growth factors driving the market demand?

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