

Global Sealed Liquid Oxygen Pump Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Sealed Liquid Oxygen Pump market size is expected to reach \$ 234 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Global shipments of sealed liquid oxygen pumps are projected to reach approximately 38,000 units annually in 2025, with the average selling price worldwide ranging from \$3,000 to \$5,000 per unit. The average transaction price for mainstream industrial and medical-grade products is around \$4,000 per unit. This price range primarily corresponds to small-to-medium power industrial and medical-grade liquid oxygen transfer pumps, excluding aerospace-grade high-speed turbo cryogenic pumps or large-scale air separation unit-specific high-pressure cryogenic pumps. Major demand sources include large hospital liquid oxygen storage systems, small-to-medium-sized air separation units (ASUs), industrial gas filling stations, oxygen-enriched combustion systems in the steel metallurgy industry, and oxygen supply systems for the new energy and electronics industries. The European and American markets account for approximately 45%-50%, with the US, Germany, and Japan exhibiting high technological concentration in sealing structures and materials engineering. The Asia-Pacific region (China, India, and Southeast Asia) is experiencing rapid growth driven by industrial gas stations and new air separation unit investments. Sealed Liquid Oxygen Pumps are specialized cryogenic pumps that operate in ultra-low temperatures down to -183°C, employing mechanical seals or shielded motors to prevent liquid oxygen leakage. Their core function is to provide stable and safe liquid transport and pressure boosting between liquid oxygen storage tanks and downstream vaporization, pressurization, or filling systems. Their engineering focus is not on ordinary cryogenic liquid transport equipment, but rather on safety-critical components in high-oxygen-concentration, high-oxidation-prone environments. Compared to open or conventional cryogenic pumps, sealed liquid oxygen pumps have higher standards in shaft seal

structure, material oxidation resistance, fire and explosion protection design, and lubrication isolation structures, especially in the shaft seal area where any trace leakage and grease contamination risks must be avoided. With the advancement of distributed air separation unit deployments and the construction of medical oxygen supply infrastructure, this product is evolving from a 'cryo-assisted device' to a 'standardized safe transport unit.'

Supply Situation

Upstream suppliers mainly include austenitic stainless steel and high-nickel alloy materials, cryogenic bearing steel and ceramic bearing components, silicon carbide and carbon ring materials for mechanical seals, cryogenic insulation structural materials, and high-precision CNC machined and dynamically balanced components. Cryogenic sealing components and bearing structures typically account for 40%-55% of the total BOM (Bill of Materials). Typical upstream suppliers include: Sandvik, Timken, Saint-Gobain, Parker Hannifin, and Nippon Steel.

Manufacturer Characteristics

Barber Nichols: Deeply involved in cryogenic pump and high-speed turbopump technology, strengthening cryogenic materials and sealing safety design. Alfa Laval: Optimizing the integration capabilities of cryogenic pumps and heat exchange systems to improve the overall efficiency of air separation systems. Cryostar: Advancing the efficiency upgrade of cryogenic centrifugal pumps in the industrial gas and small-to-medium-sized air separation fields. Nikkiso: Strengthening shielded motor structures and cryogenic sealing systems to improve operational stability and maintenance cycles. Ebara: Strengthening the standardization and modular design of industrial-grade cryogenic pumps and expanding into the Asian market.

Breakthrough Point

For manufacturers of sealed liquid oxygen pumps, the real breakthrough lies not in simply increasing head or expanding flow range, but in integrating materials engineering, sealing technology, and intelligent monitoring systems into a continuous safety control chain. Take Nikkiso as an example: in its new generation of cryogenic pumps, it has strengthened the shielded motor structure and combined it with a real-time vibration and temperature monitoring system, enabling predictive maintenance management of the pumps in ultra-low temperature and high oxidation environments. Compared to the traditional model relying on periodic maintenance, the system solution

combining intelligent monitoring and material upgrades transforms equipment from 'passive maintenance' to 'proactive risk warning,' becoming a key to future competition.

Applications

Sealed Liquid Oxygen Pumps are mainly used in large hospital liquid oxygen storage tank delivery systems, liquid oxygen pressurization systems in small and medium-sized air separation units, industrial gas filling stations, oxygen-enriched combustion systems in steel metallurgy, and oxygen supply systems for the new energy and electronics industries. Typical downstream customers include: Air Liquide, Linde, Air Products, POSCO, and SpaceX.

Technology Trends

From a technological evolution perspective, sealed liquid oxygen pumps are transforming from 'traditional cryogenic delivery equipment' to 'intelligent cryogenic fluid management nodes.' Taking Barber Nichols as an example, its cryogenic pump design incorporates digital flow field simulation to optimize impeller structure and combines it with a real-time vibration monitoring system to reduce cavitation and bearing fatigue risks. Future trends include magnetically driven seal-less structures, cryogenic composite material adaptation technology, and AI-based fault prediction models. These models utilize data acquisition to build an operational database, enabling early identification of seal wear and bearing anomalies.

Example

In a liquid oxygen delivery system upgrade project at an industrial gas station in the United States, Barber Nichols won a public tender for small-to-medium power sealed liquid oxygen pumps for stable delivery from liquid oxygen storage tanks to the vaporization and pressurization system. The project emphasized low-leakage design and continuous operational reliability, and required the provision of operational monitoring data interfaces for later maintenance and management. This project demonstrates the fundamental engineering attributes and core safety position of sealed liquid oxygen pumps in industrial gas systems.

Market Influencing Factors

The core influencing factors of the sealed liquid oxygen pump market do not depend on the cycle of a single industrial pump industry, but are closely related to the global

investment scale in air separation, the construction of medical oxygen supply systems, and industrial gas demand. On the one hand, the steel and chemical industries maintain stable oxygen demand, driving demand for air separation units and related cryogenic pumps. On the other hand, the upgrading of liquid oxygen storage tanks in the medical system and the construction of regional gas stations create a stable replacement market. It is worth noting that this market exhibits a pattern where European, American, and Japanese companies have a high concentration in high-end sealing and materials technologies, while Chinese manufacturers possess economies of scale in engineering manufacturing and cost control. Future competition will revolve around sealing reliability, standardized production capabilities, and intelligent operation and maintenance capabilities, rather than simply price competition. Overall, this industry possesses characteristics of moderate and steady growth and high safety barriers, and its competitive essence is shifting from 'traditional mechanical manufacturing capabilities' to system-level capabilities in 'materials engineering and digital operation and maintenance capabilities.'

This report studies the global Sealed Liquid Oxygen Pump production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Sealed Liquid Oxygen Pump total production and demand, 2021-2032, (K Units)

Global Sealed Liquid Oxygen Pump total production value, 2021-2032, (USD Million)

Global Sealed Liquid Oxygen Pump production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Sealed Liquid Oxygen Pump consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Sealed Liquid Oxygen Pump domestic production, consumption, key domestic manufacturers and share

Global Sealed Liquid Oxygen Pump production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Sealed Liquid Oxygen Pump production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Sealed Liquid Oxygen Pump production by Application, production, value,

CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Sealed Liquid Oxygen Pump 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 Barber Nichols, Alfa Laval, Cryostar, Nikkiso, Ebara, Ruhrpumpen, Flowserve, Edwards, Houpu, Stirling, 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 Sealed Liquid Oxygen Pump market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Sealed Liquid Oxygen Pump Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Sealed Liquid Oxygen Pump Market, Segmentation by Type:

Centrifugal Liquid Oxygen Pump

Reciprocating Liquid Oxygen Pump

Global Sealed Liquid Oxygen Pump Market, Segmentation by Export Pressure:

1.6-5 MPa

> 5 Mpa

Global Sealed Liquid Oxygen Pump Market, Segmentation by Flow Range:

2-50 m³/h

50-100 m³/h

> 100 m³/h

Global Sealed Liquid Oxygen Pump Market, Segmentation by Application:

Industrial

Medical

Aerospace

Others

Companies Profiled:

Barber Nichols

Alfa Laval

Cryostar

Nikkiso

Ebara

Ruhrpumpen

Flowserve

Edwards

Houpu

Stirling

PHPK Technologies

Optimex

Vanzetti Engineering

WOBD

JZYJ

Indian Compressors

Hangzhou NAC

Key Questions Answered:

1. How big is the global Sealed Liquid Oxygen Pump market?
2. What is the demand of the global Sealed Liquid Oxygen Pump market?
3. What is the year over year growth of the global Sealed Liquid Oxygen Pump market?
4. What is the production and production value of the global Sealed Liquid Oxygen

Pump market?

5. Who are the key producers in the global Sealed Liquid Oxygen Pump market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

- 4.4.1 United States Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (States, Country)
- 4.4.2 United States Based Manufacturers Sealed Liquid Oxygen Pump Production Value (2021-2026)
- 4.4.3 United States Based Manufacturers Sealed Liquid Oxygen Pump Production (2021-2026)
- 4.5 China Based Sealed Liquid Oxygen Pump Manufacturers and Market Share
 - 4.5.1 China Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers Sealed Liquid Oxygen Pump Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers Sealed Liquid Oxygen Pump Production (2021-2026)
- 4.6 Rest of World Based Sealed Liquid Oxygen Pump Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Sealed Liquid Oxygen Pump Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Centrifugal Liquid Oxygen Pump
 - 5.2.2 Reciprocating Liquid Oxygen Pump
- 5.3 Market Segment by Type
 - 5.3.1 World Sealed Liquid Oxygen Pump Production by Type (2021-2032)
 - 5.3.2 World Sealed Liquid Oxygen Pump Production Value by Type (2021-2032)
 - 5.3.3 World Sealed Liquid Oxygen Pump Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY EXPORT PRESSURE

- 6.1 World Sealed Liquid Oxygen Pump Market Size Overview by Export Pressure: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Export Pressure

6.2.1 6.2.2 1.6-5 MPa

6.2.3 > 5 Mpa

6.3 Market Segment by Export Pressure

6.3.1 World Sealed Liquid Oxygen Pump Production by Export Pressure (2021-2032)

6.3.2 World Sealed Liquid Oxygen Pump Production Value by Export Pressure (2021-2032)

6.3.3 World Sealed Liquid Oxygen Pump Average Price by Export Pressure (2021-2032)

7 MARKET ANALYSIS BY FLOW RANGE

7.1 World Sealed Liquid Oxygen Pump Market Size Overview by Flow Range: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Flow Range

7.2.1 2-50 m³/h

7.2.2 50-100 m³/h

7.2.3 > 100 m³/h

7.3 Market Segment by Flow Range

7.3.1 World Sealed Liquid Oxygen Pump Production by Flow Range (2021-2032)

7.3.2 World Sealed Liquid Oxygen Pump Production Value by Flow Range (2021-2032)

7.3.3 World Sealed Liquid Oxygen Pump Average Price by Flow Range (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Sealed Liquid Oxygen Pump Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Industrial

8.2.2 Medical

8.2.3 Aerospace

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Sealed Liquid Oxygen Pump Production by Application (2021-2032)

8.3.2 World Sealed Liquid Oxygen Pump Production Value by Application (2021-2032)

8.3.3 World Sealed Liquid Oxygen Pump Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Barber Nichols

9.1.1 Barber Nichols Details

9.1.2 Barber Nichols Major Business

9.1.3 Barber Nichols Sealed Liquid Oxygen Pump Product and Services

9.1.4 Barber Nichols Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Barber Nichols Recent Developments/Updates

9.1.6 Barber Nichols Competitive Strengths & Weaknesses

9.2 Alfa Laval

9.2.1 Alfa Laval Details

9.2.2 Alfa Laval Major Business

9.2.3 Alfa Laval Sealed Liquid Oxygen Pump Product and Services

9.2.4 Alfa Laval Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Alfa Laval Recent Developments/Updates

9.2.6 Alfa Laval Competitive Strengths & Weaknesses

9.3 Cryostar

9.3.1 Cryostar Details

9.3.2 Cryostar Major Business

9.3.3 Cryostar Sealed Liquid Oxygen Pump Product and Services

9.3.4 Cryostar Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Cryostar Recent Developments/Updates

9.3.6 Cryostar Competitive Strengths & Weaknesses

9.4 Nikkiso

9.4.1 Nikkiso Details

9.4.2 Nikkiso Major Business

9.4.3 Nikkiso Sealed Liquid Oxygen Pump Product and Services

9.4.4 Nikkiso Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Nikkiso Recent Developments/Updates

9.4.6 Nikkiso Competitive Strengths & Weaknesses

9.5 Ebara

9.5.1 Ebara Details

9.5.2 Ebara Major Business

9.5.3 Ebara Sealed Liquid Oxygen Pump Product and Services

9.5.4 Ebara Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Ebara Recent Developments/Updates

- 9.5.6 Ebara Competitive Strengths & Weaknesses
- 9.6 Ruhrpumpen
 - 9.6.1 Ruhrpumpen Details
 - 9.6.2 Ruhrpumpen Major Business
 - 9.6.3 Ruhrpumpen Sealed Liquid Oxygen Pump Product and Services
 - 9.6.4 Ruhrpumpen Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Ruhrpumpen Recent Developments/Updates
 - 9.6.6 Ruhrpumpen Competitive Strengths & Weaknesses
- 9.7 Flowserve
 - 9.7.1 Flowserve Details
 - 9.7.2 Flowserve Major Business
 - 9.7.3 Flowserve Sealed Liquid Oxygen Pump Product and Services
 - 9.7.4 Flowserve Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Flowserve Recent Developments/Updates
 - 9.7.6 Flowserve Competitive Strengths & Weaknesses
- 9.8 Edwards
 - 9.8.1 Edwards Details
 - 9.8.2 Edwards Major Business
 - 9.8.3 Edwards Sealed Liquid Oxygen Pump Product and Services
 - 9.8.4 Edwards Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Edwards Recent Developments/Updates
 - 9.8.6 Edwards Competitive Strengths & Weaknesses
- 9.9 Houpu
 - 9.9.1 Houpu Details
 - 9.9.2 Houpu Major Business
 - 9.9.3 Houpu Sealed Liquid Oxygen Pump Product and Services
 - 9.9.4 Houpu Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Houpu Recent Developments/Updates
 - 9.9.6 Houpu Competitive Strengths & Weaknesses
- 9.10 Stirling
 - 9.10.1 Stirling Details
 - 9.10.2 Stirling Major Business
 - 9.10.3 Stirling Sealed Liquid Oxygen Pump Product and Services
 - 9.10.4 Stirling Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.10.5 Stirling Recent Developments/Updates
- 9.10.6 Stirling Competitive Strengths & Weaknesses
- 9.11 PHPK Technologies
 - 9.11.1 PHPK Technologies Details
 - 9.11.2 PHPK Technologies Major Business
 - 9.11.3 PHPK Technologies Sealed Liquid Oxygen Pump Product and Services
 - 9.11.4 PHPK Technologies Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 PHPK Technologies Recent Developments/Updates
 - 9.11.6 PHPK Technologies Competitive Strengths & Weaknesses
- 9.12 Optimex
 - 9.12.1 Optimex Details
 - 9.12.2 Optimex Major Business
 - 9.12.3 Optimex Sealed Liquid Oxygen Pump Product and Services
 - 9.12.4 Optimex Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Optimex Recent Developments/Updates
 - 9.12.6 Optimex Competitive Strengths & Weaknesses
- 9.13 Vanzetti Engineering
 - 9.13.1 Vanzetti Engineering Details
 - 9.13.2 Vanzetti Engineering Major Business
 - 9.13.3 Vanzetti Engineering Sealed Liquid Oxygen Pump Product and Services
 - 9.13.4 Vanzetti Engineering Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Vanzetti Engineering Recent Developments/Updates
 - 9.13.6 Vanzetti Engineering Competitive Strengths & Weaknesses
- 9.14 WOBD
 - 9.14.1 WOBD Details
 - 9.14.2 WOBD Major Business
 - 9.14.3 WOBD Sealed Liquid Oxygen Pump Product and Services
 - 9.14.4 WOBD Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 WOBD Recent Developments/Updates
 - 9.14.6 WOBD Competitive Strengths & Weaknesses
- 9.15 JZYJ
 - 9.15.1 JZYJ Details
 - 9.15.2 JZYJ Major Business
 - 9.15.3 JZYJ Sealed Liquid Oxygen Pump Product and Services
 - 9.15.4 JZYJ Sealed Liquid Oxygen Pump Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.15.5 JZYJ Recent Developments/Updates

9.15.6 JZYJ Competitive Strengths & Weaknesses

9.16 Indian Compressors

9.16.1 Indian Compressors Details

9.16.2 Indian Compressors Major Business

9.16.3 Indian Compressors Sealed Liquid Oxygen Pump Product and Services

9.16.4 Indian Compressors Sealed Liquid Oxygen Pump Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.16.5 Indian Compressors Recent Developments/Updates

9.16.6 Indian Compressors Competitive Strengths & Weaknesses

9.17 Hangzhou NAC

9.17.1 Hangzhou NAC Details

9.17.2 Hangzhou NAC Major Business

9.17.3 Hangzhou NAC Sealed Liquid Oxygen Pump Product and Services

9.17.4 Hangzhou NAC Sealed Liquid Oxygen Pump Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.17.5 Hangzhou NAC Recent Developments/Updates

9.17.6 Hangzhou NAC Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Sealed Liquid Oxygen Pump Industry Chain

10.2 Sealed Liquid Oxygen Pump Upstream Analysis

10.2.1 Sealed Liquid Oxygen Pump Core Raw Materials

10.2.2 Main Manufacturers of Sealed Liquid Oxygen Pump Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Sealed Liquid Oxygen Pump Production Mode

10.6 Sealed Liquid Oxygen Pump Procurement Model

10.7 Sealed Liquid Oxygen Pump Industry Sales Model and Sales Channels

10.7.1 Sealed Liquid Oxygen Pump Sales Model

10.7.2 Sealed Liquid Oxygen Pump 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 Sealed Liquid Oxygen Pump Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Sealed Liquid Oxygen Pump Production Value by Region (2021-2026) & (USD Million)

Table 3. World Sealed Liquid Oxygen Pump Production Value by Region (2027-2032) & (USD Million)

Table 4. World Sealed Liquid Oxygen Pump Production Value Market Share by Region (2021-2026)

Table 5. World Sealed Liquid Oxygen Pump Production Value Market Share by Region (2027-2032)

Table 6. World Sealed Liquid Oxygen Pump Production by Region (2021-2026) & (K Units)

Table 7. World Sealed Liquid Oxygen Pump Production by Region (2027-2032) & (K Units)

Table 8. World Sealed Liquid Oxygen Pump Production Market Share by Region (2021-2026)

Table 9. World Sealed Liquid Oxygen Pump Production Market Share by Region (2027-2032)

Table 10. World Sealed Liquid Oxygen Pump Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Sealed Liquid Oxygen Pump Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Sealed Liquid Oxygen Pump Major Market Trends

Table 13. World Sealed Liquid Oxygen Pump Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Sealed Liquid Oxygen Pump Consumption by Region (2021-2026) & (K Units)

Table 15. World Sealed Liquid Oxygen Pump Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Sealed Liquid Oxygen Pump Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Sealed Liquid Oxygen Pump Producers in 2025

Table 18. World Sealed Liquid Oxygen Pump Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Sealed Liquid Oxygen Pump Producers in 2025

Table 20. World Sealed Liquid Oxygen Pump Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Sealed Liquid Oxygen Pump Company Evaluation Quadrant

Table 22. World Sealed Liquid Oxygen Pump Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Sealed Liquid Oxygen Pump Production Site of Key Manufacturer

Table 24. Sealed Liquid Oxygen Pump Market: Company Product Type Footprint

Table 25. Sealed Liquid Oxygen Pump Market: Company Product Application Footprint

Table 26. Sealed Liquid Oxygen Pump Competitive Factors

Table 27. Sealed Liquid Oxygen Pump New Entrant and Capacity Expansion Plans

Table 28. Sealed Liquid Oxygen Pump Mergers & Acquisitions Activity

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

Table 30. United States VS China Sealed Liquid Oxygen Pump Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Sealed Liquid Oxygen Pump Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Sealed Liquid Oxygen Pump Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Sealed Liquid Oxygen Pump Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Sealed Liquid Oxygen Pump Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Sealed Liquid Oxygen Pump Production Market Share (2021-2026)

Table 37. China Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Sealed Liquid Oxygen Pump Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Sealed Liquid Oxygen Pump Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Sealed Liquid Oxygen Pump Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Sealed Liquid Oxygen Pump Production Market

Share (2021-2026)

Table 42. Rest of World Based Sealed Liquid Oxygen Pump Manufacturers, Headquarters and Production Site (State, Country)

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

Table 44. Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production Market Share (2021-2026)

Table 47. World Sealed Liquid Oxygen Pump Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Sealed Liquid Oxygen Pump Production by Type (2021-2026) & (K Units)

Table 49. World Sealed Liquid Oxygen Pump Production by Type (2027-2032) & (K Units)

Table 50. World Sealed Liquid Oxygen Pump Production Value by Type (2021-2026) & (USD Million)

Table 51. World Sealed Liquid Oxygen Pump Production Value by Type (2027-2032) & (USD Million)

Table 52. World Sealed Liquid Oxygen Pump Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Sealed Liquid Oxygen Pump Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Sealed Liquid Oxygen Pump Production Value by Export Pressure, (USD Million), 2021 & 2025 & 2032

Table 55. World Sealed Liquid Oxygen Pump Production by Export Pressure (2021-2026) & (K Units)

Table 56. World Sealed Liquid Oxygen Pump Production by Export Pressure (2027-2032) & (K Units)

Table 57. World Sealed Liquid Oxygen Pump Production Value by Export Pressure (2021-2026) & (USD Million)

Table 58. World Sealed Liquid Oxygen Pump Production Value by Export Pressure (2027-2032) & (USD Million)

Table 59. World Sealed Liquid Oxygen Pump Average Price by Export Pressure (2021-2026) & (US\$/Unit)

Table 60. World Sealed Liquid Oxygen Pump Average Price by Export Pressure (2027-2032) & (US\$/Unit)

Table 61. World Sealed Liquid Oxygen Pump Production Value by Flow Range, (USD Million), 2021 & 2025 & 2032

Table 62. World Sealed Liquid Oxygen Pump Production by Flow Range (2021-2026) & (K Units)

Table 63. World Sealed Liquid Oxygen Pump Production by Flow Range (2027-2032) & (K Units)

Table 64. World Sealed Liquid Oxygen Pump Production Value by Flow Range (2021-2026) & (USD Million)

Table 65. World Sealed Liquid Oxygen Pump Production Value by Flow Range (2027-2032) & (USD Million)

Table 66. World Sealed Liquid Oxygen Pump Average Price by Flow Range (2021-2026) & (US\$/Unit)

Table 67. World Sealed Liquid Oxygen Pump Average Price by Flow Range (2027-2032) & (US\$/Unit)

Table 68. World Sealed Liquid Oxygen Pump Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Sealed Liquid Oxygen Pump Production by Application (2021-2026) & (K Units)

Table 70. World Sealed Liquid Oxygen Pump Production by Application (2027-2032) & (K Units)

Table 71. World Sealed Liquid Oxygen Pump Production Value by Application (2021-2026) & (USD Million)

Table 72. World Sealed Liquid Oxygen Pump Production Value by Application (2027-2032) & (USD Million)

Table 73. World Sealed Liquid Oxygen Pump Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Sealed Liquid Oxygen Pump Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Barber Nichols Basic Information, Manufacturing Base and Competitors

Table 76. Barber Nichols Major Business

Table 77. Barber Nichols Sealed Liquid Oxygen Pump Product and Services

Table 78. Barber Nichols Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Barber Nichols Recent Developments/Updates

Table 80. Barber Nichols Competitive Strengths & Weaknesses

Table 81. Alfa Laval Basic Information, Manufacturing Base and Competitors

Table 82. Alfa Laval Major Business

Table 83. Alfa Laval Sealed Liquid Oxygen Pump Product and Services

Table 84. Alfa Laval Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Alfa Laval Recent Developments/Updates

Table 86. Alfa Laval Competitive Strengths & Weaknesses

Table 87. Cryostar Basic Information, Manufacturing Base and Competitors

Table 88. Cryostar Major Business

Table 89. Cryostar Sealed Liquid Oxygen Pump Product and Services

Table 90. Cryostar Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Cryostar Recent Developments/Updates

Table 92. Cryostar Competitive Strengths & Weaknesses

Table 93. Nikkiso Basic Information, Manufacturing Base and Competitors

Table 94. Nikkiso Major Business

Table 95. Nikkiso Sealed Liquid Oxygen Pump Product and Services

Table 96. Nikkiso Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Nikkiso Recent Developments/Updates

Table 98. Nikkiso Competitive Strengths & Weaknesses

Table 99. Ebara Basic Information, Manufacturing Base and Competitors

Table 100. Ebara Major Business

Table 101. Ebara Sealed Liquid Oxygen Pump Product and Services

Table 102. Ebara Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Ebara Recent Developments/Updates

Table 104. Ebara Competitive Strengths & Weaknesses

Table 105. Ruhrpumpen Basic Information, Manufacturing Base and Competitors

Table 106. Ruhrpumpen Major Business

Table 107. Ruhrpumpen Sealed Liquid Oxygen Pump Product and Services

Table 108. Ruhrpumpen Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Ruhrpumpen Recent Developments/Updates

Table 110. Ruhrpumpen Competitive Strengths & Weaknesses

Table 111. Flowserve Basic Information, Manufacturing Base and Competitors

Table 112. Flowserve Major Business

Table 113. Flowserve Sealed Liquid Oxygen Pump Product and Services

Table 114. Flowserve Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 115. Flowserve Recent Developments/Updates

Table 116. Flowserve Competitive Strengths & Weaknesses

Table 117. Edwards Basic Information, Manufacturing Base and Competitors

Table 118. Edwards Major Business

Table 119. Edwards Sealed Liquid Oxygen Pump Product and Services

Table 120. Edwards Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Edwards Recent Developments/Updates

Table 122. Edwards Competitive Strengths & Weaknesses

Table 123. Houpu Basic Information, Manufacturing Base and Competitors

Table 124. Houpu Major Business

Table 125. Houpu Sealed Liquid Oxygen Pump Product and Services

Table 126. Houpu Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Houpu Recent Developments/Updates

Table 128. Houpu Competitive Strengths & Weaknesses

Table 129. Stirling Basic Information, Manufacturing Base and Competitors

Table 130. Stirling Major Business

Table 131. Stirling Sealed Liquid Oxygen Pump Product and Services

Table 132. Stirling Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Stirling Recent Developments/Updates

Table 134. Stirling Competitive Strengths & Weaknesses

Table 135. PHPK Technologies Basic Information, Manufacturing Base and Competitors

Table 136. PHPK Technologies Major Business

Table 137. PHPK Technologies Sealed Liquid Oxygen Pump Product and Services

Table 138. PHPK Technologies Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. PHPK Technologies Recent Developments/Updates

Table 140. PHPK Technologies Competitive Strengths & Weaknesses

Table 141. Optimex Basic Information, Manufacturing Base and Competitors

Table 142. Optimex Major Business

Table 143. Optimex Sealed Liquid Oxygen Pump Product and Services

Table 144. Optimex Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 145. Optimex Recent Developments/Updates
- Table 146. Optimex Competitive Strengths & Weaknesses
- Table 147. Vanzetti Engineering Basic Information, Manufacturing Base and Competitors
- Table 148. Vanzetti Engineering Major Business
- Table 149. Vanzetti Engineering Sealed Liquid Oxygen Pump Product and Services
- Table 150. Vanzetti Engineering Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Vanzetti Engineering Recent Developments/Updates
- Table 152. Vanzetti Engineering Competitive Strengths & Weaknesses
- Table 153. WOBD Basic Information, Manufacturing Base and Competitors
- Table 154. WOBD Major Business
- Table 155. WOBD Sealed Liquid Oxygen Pump Product and Services
- Table 156. WOBD Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. WOBD Recent Developments/Updates
- Table 158. WOBD Competitive Strengths & Weaknesses
- Table 159. JZYJ Basic Information, Manufacturing Base and Competitors
- Table 160. JZYJ Major Business
- Table 161. JZYJ Sealed Liquid Oxygen Pump Product and Services
- Table 162. JZYJ Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. JZYJ Recent Developments/Updates
- Table 164. JZYJ Competitive Strengths & Weaknesses
- Table 165. Indian Compressors Basic Information, Manufacturing Base and Competitors
- Table 166. Indian Compressors Major Business
- Table 167. Indian Compressors Sealed Liquid Oxygen Pump Product and Services
- Table 168. Indian Compressors Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. Indian Compressors Recent Developments/Updates
- Table 170. Indian Compressors Competitive Strengths & Weaknesses
- Table 171. Hangzhou NAC Basic Information, Manufacturing Base and Competitors
- Table 172. Hangzhou NAC Major Business
- Table 173. Hangzhou NAC Sealed Liquid Oxygen Pump Product and Services
- Table 174. Hangzhou NAC Sealed Liquid Oxygen Pump Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 175. Hangzhou NAC Recent Developments/Updates

Table 176. Hangzhou NAC Competitive Strengths & Weaknesses

Table 177. Global Key Players of Sealed Liquid Oxygen Pump Upstream (Raw Materials)

Table 178. Global Sealed Liquid Oxygen Pump Typical Customers

Table 179. Sealed Liquid Oxygen Pump Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Sealed Liquid Oxygen Pump Picture

Figure 2. World Sealed Liquid Oxygen Pump Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Sealed Liquid Oxygen Pump Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Sealed Liquid Oxygen Pump Production (2021-2032) & (K Units)

Figure 5. World Sealed Liquid Oxygen Pump Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Sealed Liquid Oxygen Pump Production Value Market Share by Region (2021-2032)

Figure 7. World Sealed Liquid Oxygen Pump Production Market Share by Region (2021-2032)

Figure 8. North America Sealed Liquid Oxygen Pump Production (2021-2032) & (K Units)

Figure 9. Europe Sealed Liquid Oxygen Pump Production (2021-2032) & (K Units)

Figure 10. China Sealed Liquid Oxygen Pump Production (2021-2032) & (K Units)

Figure 11. Japan Sealed Liquid Oxygen Pump Production (2021-2032) & (K Units)

Figure 12. Sealed Liquid Oxygen Pump Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 15. World Sealed Liquid Oxygen Pump Consumption Market Share by Region (2021-2032)

Figure 16. United States Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 17. China Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 18. Europe Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 19. Japan Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 20. South Korea Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

Figure 22. India Sealed Liquid Oxygen Pump Consumption (2021-2032) & (K Units)

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

Figure 24. Global Four-firm Concentration Ratios (CR4) for Sealed Liquid Oxygen Pump Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Sealed Liquid Oxygen Pump

Markets in 2025

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

Figure 27. United States VS China: Sealed Liquid Oxygen Pump Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Sealed Liquid Oxygen Pump Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Sealed Liquid Oxygen Pump Production Market Share 2025

Figure 30. China Based Manufacturers Sealed Liquid Oxygen Pump Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Sealed Liquid Oxygen Pump Production Market Share 2025

Figure 32. World Sealed Liquid Oxygen Pump Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Sealed Liquid Oxygen Pump Production Value Market Share by Type in 2025

Figure 34. Centrifugal Liquid Oxygen Pump

Figure 35. Reciprocating Liquid Oxygen Pump

Figure 36. World Sealed Liquid Oxygen Pump Production Market Share by Type (2021-2032)

Figure 37. World Sealed Liquid Oxygen Pump Production Value Market Share by Type (2021-2032)

Figure 38. World Sealed Liquid Oxygen Pump Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Sealed Liquid Oxygen Pump Production Value by Export Pressure, (USD Million), 2021 & 2025 & 2032

Figure 40. World Sealed Liquid Oxygen Pump Production Value Market Share by Export Pressure in 2025

Figure 41. Figure 42. 1.6?5 MPa

Figure 43. > 5 Mpa

Figure 44. World Sealed Liquid Oxygen Pump Production Market Share by Export Pressure (2021-2032)

Figure 45. World Sealed Liquid Oxygen Pump Production Value Market Share by Export Pressure (2021-2032)

Figure 46. World Sealed Liquid Oxygen Pump Average Price by Export Pressure (2021-2032) & (US\$/Unit)

Figure 47. World Sealed Liquid Oxygen Pump Production Value by Flow Range, (USD Million), 2021 & 2025 & 2032

- Figure 48. World Sealed Liquid Oxygen Pump Production Value Market Share by Flow Range in 2025
- Figure 49. 2?50 m³/h
- Figure 50. 50-100 m³/h
- Figure 51. > 100 m³/h
- Figure 52. World Sealed Liquid Oxygen Pump Production Market Share by Flow Range (2021-2032)
- Figure 53. World Sealed Liquid Oxygen Pump Production Value Market Share by Flow Range (2021-2032)
- Figure 54. World Sealed Liquid Oxygen Pump Average Price by Flow Range (2021-2032) & (US\$/Unit)
- Figure 55. World Sealed Liquid Oxygen Pump Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 56. World Sealed Liquid Oxygen Pump Production Value Market Share by Application in 2025
- Figure 57. Industrial
- Figure 58. Medical
- Figure 59. Aerospace
- Figure 60. Others
- Figure 61. World Sealed Liquid Oxygen Pump Production Market Share by Application (2021-2032)
- Figure 62. World Sealed Liquid Oxygen Pump Production Value Market Share by Application (2021-2032)
- Figure 63. World Sealed Liquid Oxygen Pump Average Price by Application (2021-2032) & (US\$/Unit)
- Figure 64. Sealed Liquid Oxygen Pump Industry Chain
- Figure 65. Sealed Liquid Oxygen Pump Procurement Model
- Figure 66. Sealed Liquid Oxygen Pump Sales Model
- Figure 67. Sealed Liquid Oxygen Pump Sales Channels, Direct Sales, and Distribution
- Figure 68. Methodology
- Figure 69. Research Process and Data Source

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