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Global Supercritical CO? Extraction Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Supercritical CO? Extraction Services market size is expected to reach $ 173 million by 2032, rising at a market growth of 6.5% CAGR during the forecast period (2026-2032).

Supercritical CO? extraction services refer to technical processing services provided by professional service providers that utilize supercritical carbon dioxide as the primary extraction and separation medium. Based on the client's provided raw materials, target components, quality standards, and end-application requirements, services include process development, laboratory validation, pilot-scale amplification, and commercial-scale production. CO?, at temperatures above approximately 31.1°C and reaching the corresponding critical pressure, possesses both high gas diffusivity and liquid solubility. By adjusting temperature, pressure, flow rate, extraction time, and separation conditions, it is possible to selectively extract oils, essential oils, aroma substances, fat-soluble active ingredients, and other target components. Further degreasing, deodorization, purification, and fractionation can also be achieved.

Key Findings

Supercritical CO? Extraction Services span ?50L development systems and ?50L commercial production capacities

?40MPa and ?40MPa processes address different extraction selectivity and separation requirements

Target-component extraction and impurity-removal purification constitute the two

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principal process objectives

Food and beverage flavors and fragrances nutrition and functional foods form the core downstream demand base

Integrated process development scale-up toll manufacturing and post-extraction treatment are becoming central service capabilities

Market Trends

Supercritical CO? Extraction Services are evolving from relatively standardized single-stage toll extraction toward integrated process-development and contract-manufacturing platforms. Customers increasingly require service providers to participate earlier in product development, beginning with feedstock analysis and feasibility trials and continuing through pilot production, process optimization, scale-up, extraction, fractionation, purification and finished-extract quality control. This change is increasing the strategic importance of providers that operate multiple vessel sizes and pressure ranges because customers can retain process continuity when moving from small batches to commercial production. Another important direction is the expansion of service objectives from recovery of target botanical components to deodorization, decontamination, defatting, concentration and other purification operations. High-value applications also place greater emphasis on compound selectivity, preservation of sensitive components and reproducible batch specifications. Large-scale providers are therefore strengthening analytical laboratories, post-extraction processing and quality-management capabilities alongside extraction capacity, making process know-how and downstream finishing increasingly important sources of differentiation.

Market Dynamics

Drivers

Demand is supported by the increasing commercial use of concentrated botanical, flavor, nutrition and functional-food ingredients where product purity, process controllability and solvent management are important purchasing considerations. Supercritical CO? can be separated from the extracted product by pressure reduction and largely recycled within an appropriately designed process, while pressure and temperature adjustments provide a controllable means of modifying extraction selectivity. Regulatory acceptance of carbon dioxide in food processing also supports

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food-related applications; EU Directive 2009/32/EC lists carbon dioxide among extraction solvents that may be used in accordance with good manufacturing practice. At the customer level, outsourced Supercritical CO? Extraction Services reduce the requirement to purchase and operate specialized high-pressure equipment internally, making toll processing attractive for companies with variable volumes, early-stage products or limited in-house high-pressure process expertise.

Restraints

The market faces relatively high technical and operating barriers. Supercritical extraction requires pressure-rated vessels, pumping and compression systems, heat control, separators, instrumentation and safety systems, creating substantial capital requirements for industrial-scale providers. Process performance is also highly dependent on feedstock moisture, particle size, composition, pretreatment and operating parameters, meaning that a process optimized for one botanical or ingredient cannot always be transferred directly to another. Commercial scale-up can require repeated trials to balance extraction yield, selectivity, cycle time and cost. Small-volume customer projects may therefore carry relatively high development and changeover costs, while cleaning, analytical validation and production scheduling reduce effective plant utilization when facilities process many different materials.

Opportunities

The most attractive opportunities are emerging at the intersection of high-value natural ingredients and more sophisticated separation requirements. Target-component extraction remains an important foundation, while impurity-removal purification opens additional possibilities in deodorization, decontamination, defatting and selective removal of undesirable fractions. Nutritional lipids, specialty botanical actives, natural colors, flavors, fragrances and functional-food ingredients provide opportunities where maintaining product characteristics and achieving consistent specifications can justify more advanced processing. Another opportunity lies in customers moving from development to industrial production: providers capable of offering small-scale trials, pilot validation and large-volume toll manufacturing on one platform can capture value throughout the commercialization cycle. Services that combine extraction with fractionation, formulation, analytical testing or other post-extraction processing can further increase customer retention and value per project.

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Challenges

Long-term challenges center on achieving consistent industrial economics while maintaining product-specific process performance. Natural raw materials can vary materially by origin, harvest conditions and composition, increasing the need for incoming-material characterization and parameter adjustment. Pressure, temperature, CO? flow and residence time interact with one another, making scale-up more complex than simply increasing extraction-vessel size. Higher-pressure processing can expand the operating window but also raises equipment, energy, maintenance and validation requirements. Service providers additionally need to manage cross-contamination risk, batch traceability, customer confidentiality and different quality requirements across food, nutrition and specialty applications. As customers become more technically sophisticated, providers must demonstrate reproducibility, analytical evidence and predictable scale-up performance rather than competing primarily on available extraction capacity.

Value Chain Analysis

The upstream portion of the Supercritical CO? Extraction Services value chain comprises botanical materials, seeds, grains, fruits, herbs, oils and other customer-supplied feedstocks, together with process-grade CO?, pretreatment materials and analytical inputs. Raw-material preparation—including drying, milling, size control and moisture adjustment—can materially influence extraction efficiency. The midstream value-creation process begins with feasibility assessment and laboratory trials, followed by parameter optimization, pilot validation and scale-up. During commercial processing, conditioned CO? passes through the extraction vessel under controlled pressure and temperature, dissolves selected components and then enters one or more separation stages where pressure and temperature changes recover the extract and recycle CO?. Depending on customer specifications, the process may continue into fractionation, filtration, deodorization, purification, concentration or other finishing stages.

The principal cost structure includes high-pressure equipment depreciation, compression and circulation energy, labor, maintenance, cleaning, laboratory testing, quality systems and plant utilization. Value creation is therefore strongly linked to throughput, campaign size and the ability to convert development projects into recurring commercial production. Providers with broad vessel-volume ranges can serve R&D and production customers on the same process platform, while high-pressure capability expands the technical operating window for more demanding separation tasks. Downstream value is captured by ingredient manufacturers and brand customers in

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food and beverage, flavors and fragrances, nutrition and health, functional foods and related specialty markets, where standardized extract quality, regulatory documentation and stable supply are important purchasing factors.

Segment Insights

By extraction-vessel volume, ?50L services are primarily suited to feasibility studies, R&D, pilot work, specialized low-volume products and initial market-validation batches. This segment plays a critical role in determining extraction curves, pressure-temperature combinations, yield and product specifications before larger capital or manufacturing commitments are made. ?50L systems are more closely associated with scale-up and commercial toll manufacturing, with established providers operating equipment ranging from hundreds to thousands of liters. Publicly disclosed facilities illustrate the breadth of the industrial range: NATECO? reports extraction vessels from 3L to 16,000L, agroCO? operates lab, pilot and industrial systems including three 600L extraction vessels, while Phasex reports commercial suites using 200–400L vessels.

By process pressure, ?40MPa provides a broad operating range for many conventional botanical and ingredient extraction programs, while ?40MPa expands the available process window for applications requiring different solvent density, selectivity or difficult separations. The existence of commercial high-pressure infrastructure is well established within the service market; NATECO? reports systems capable of operation at up to 1,000 bar. By process objective, target-component extraction addresses recovery and concentration of desirable compounds, whereas impurity-removal purification focuses on reducing odors, unwanted fractions, contaminants or other undesirable components. These two objectives increasingly overlap as customers request both enrichment of valuable components and improvement of final extract specifications within the same production workflow.

Downstream Market Opportunities

Food and beverage applications create recurring opportunities in botanical extracts, oils and specialty ingredients, particularly where manufacturers require controlled flavor profiles and reproducible ingredient specifications. Flavors and fragrances are well suited to selective extraction of volatile and aroma-related compounds, making process conditions and preservation of sensory characteristics important service-selection criteria. Nutrition and health and functional-food customers place greater emphasis on concentration of active components, consistency, traceability and quality documentation, supporting demand for integrated extraction, purification and analytical

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services. As product formulations become more specialized, opportunities increasingly arise from smaller high-value projects that can be validated at pilot scale and subsequently transferred to industrial production, favoring providers with flexible capacity and strong process-development capability.

Regional Insights

Europe is an important center for Supercritical CO? Extraction Services, supported by established botanical-processing expertise, food and flavor industries and industrial-scale contract extraction infrastructure. Confirmed European providers demonstrate capabilities extending from laboratory development to large-volume extraction, fractionation and other downstream processing, while EU rules permitting carbon dioxide as an extraction solvent under good manufacturing practice provide a clear regulatory foundation for food-related uses. North America has a strong position in process engineering, contract R&D and commercial toll processing, particularly for natural products, nutrition and specialized purification applications. Providers in the region increasingly integrate extraction with chromatography, analytical services and process development.

Asia represents another important manufacturing and ingredient-processing base, supported by botanical raw-material availability, nutraceutical and functional-food production and growing high-pressure processing capabilities. Market characteristics vary substantially across countries: some providers emphasize botanical ingredients and health products, while others combine contract extraction with equipment engineering or broader ingredient manufacturing. Regional competition is consequently influenced by raw-material access, production costs, local quality systems, export certification and the ability to support international customers from development through commercial-scale manufacturing.

Competitive Landscape Analysis

Competition in Supercritical CO? Extraction Services is shaped by differences in installed extraction capacity, pressure range, process-development capability, application expertise and downstream processing depth. NATECO? represents the large-scale integrated contract-extraction model, with disclosed vessel capacities ranging from R&D scale to 16,000L and pressure capability extending to 1,000 bar, together with fractionation, deodorization and decontamination capabilities. Thar

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Process combines toll manufacturing with process R&D, extraction and purification technologies, positioning process development and scale-up as a central part of its service model. Phasex emphasizes scalable supercritical-fluid process expertise and operates multiple commercial processing suites, while agroCO? combines laboratory and pilot development with an industrial 1,800L net extraction configuration and botanical-focused toll and contract manufacturing. Hyperbaric Technologies combines commercial extraction services with high-pressure engineering expertise, and EXTRATEX integrates process development, industrial equipment and extract production capabilities. ECS Nutraceuticals Group and Essentia Pura illustrate more vertically focused models connected with nutraceutical, botanical and finished-product manufacturing. Across the market, competitive advantage is increasingly derived from the ability to reproduce customer specifications across scale, maintain high plant utilization, support multiple pressure and vessel configurations, provide analytical and quality documentation and extend projects from feasibility work into recurring industrial production.

Report Scope

This report studies the global Supercritical CO? Extraction Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Supercritical CO? Extraction Services, 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 Supercritical CO? Extraction Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Supercritical CO? Extraction Services total market, 2021-2032, (USD Million)

Global Supercritical CO? Extraction Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Supercritical CO? Extraction Services total market, key domestic companies, and share, (USD Million)

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Global Supercritical CO? Extraction Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Supercritical CO? Extraction Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Supercritical CO? Extraction Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Supercritical CO? Extraction Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NATECO?, Thar Process, Inc., Phasex Corporation, AINIA / Altex, agroCO?, Vidya Herbs Pvt. Ltd., Vesta Nutra, Canurta Naturals USA, Hyperbaric Technologies, EXTRATEX, 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 Supercritical CO? Extraction Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, 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 Supercritical CO? Extraction Services Market, By Region:

United States

China

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Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Supercritical CO? Extraction Services Market, Segmentation by Type:

Target Component Extraction Type

Impurity Removal and Purification Type

Global Supercritical CO? Extraction Services Market, Segmentation by Total Extraction Vessel Volume:

?50L

?50L

Global Supercritical CO? Extraction Services Market, Segmentation by Extraction Process Pressure:

?40MPa

?40MPa

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Global Supercritical CO? Extraction Services Market, Segmentation by Application:

Food & Beverage

Flavors & Flavors

Nutrition & Health

Functional Foods

Other

Companies Profiled:

NATECO?

Thar Process, Inc.

Phasex Corporation

AINIA / Altex

agroCO?

Vidya Herbs Pvt. Ltd.

Vesta Nutra

Canurta Naturals USA

Hyperbaric Technologies

EXTRATEX

Essentia Pura d.o.o.

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ECS Nutraceuticals Group

Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi

Kriya Ltd

AVA Plant Co.

Everserve Nano Bio-Tech Co., Ltd.

Kaizuka Genmatsu Co., Ltd.

Nutra Pure Extraction

BioZest

JMC Co., Ltd.

New Spectrum Labs

Supercritical Technology Center

Kirality Pharmaceuticals

Nova Extraction

SKH GmbH

Key Questions Answered

1. How big is the global Supercritical CO? Extraction Services market?
2. What is the demand of the global Supercritical CO? Extraction Services market?
3. What is the year over year growth of the global Supercritical CO? Extraction Services market?
4. What is the total value of the global Supercritical CO? Extraction Services market?
5. Who are the Major Players in the global Supercritical CO? Extraction Services market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Supercritical CO? Extraction Services Introduction
1.2 World Supercritical CO? Extraction Services Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Supercritical CO? Extraction Services Total Market by Region (by Headquarter Location)
  1.3.1 World Supercritical CO? Extraction Services Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.3 China Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.4 Europe Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.5 Japan Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.6 South Korea Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.7 ASEAN Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
  1.3.8 India Based Company Supercritical CO? Extraction Services Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Supercritical CO? Extraction Services Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.2 World Supercritical CO? Extraction Services Consumption Value by Region
  2.2.1 World Supercritical CO? Extraction Services Consumption Value by Region (2021-2026)
  2.2.2 World Supercritical CO? Extraction Services Consumption Value Forecast by Region (2027-2032)
2.3 United States Supercritical CO? Extraction Services Consumption Value

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(2021-2032)
2.4 China Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.5 Europe Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.6 Japan Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.7 South Korea Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.8 ASEAN Supercritical CO? Extraction Services Consumption Value (2021-2032)
2.9 India Supercritical CO? Extraction Services Consumption Value (2021-2032)

3 WORLD SUPERCRITICAL CO? EXTRACTION SERVICES COMPANIES COMPETITIVE ANALYSIS

3.1 World Supercritical CO? Extraction Services Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Supercritical CO? Extraction Services Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Supercritical CO? Extraction Services in 2025
  3.2.3 Global Concentration Ratios (CR8) for Supercritical CO? Extraction Services in 2025
3.3 Supercritical CO? Extraction Services Company Evaluation Quadrant
3.4 Supercritical CO? Extraction Services Market: Overall Company Footprint Analysis
  3.4.1 Supercritical CO? Extraction Services Market: Region Footprint
  3.4.2 Supercritical CO? Extraction Services Market: Company Product Type Footprint
  3.4.3 Supercritical CO? Extraction Services Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Supercritical CO? Extraction Services Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Supercritical CO? Extraction Services Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: Supercritical CO? Extraction Services Revenue Market Share Comparison (2021 & 2025 & 2032)

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4.2 United States Based Companies VS China Based Companies: Supercritical CO? Extraction Services Consumption Value Comparison
4.2.1 United States VS China: Supercritical CO? Extraction Services Consumption Value Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Supercritical CO? Extraction Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Supercritical CO? Extraction Services Companies and Market Share, 2021-2026
4.3.1 United States Based Supercritical CO? Extraction Services Companies, Headquarters (States, Country)
4.3.2 United States Based Companies Supercritical CO? Extraction Services Revenue, (2021-2026)
4.4 China Based Companies Supercritical CO? Extraction Services Revenue and Market Share, 2021-2026
4.4.1 China Based Supercritical CO? Extraction Services Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies Supercritical CO? Extraction Services Revenue, (2021-2026)
4.5 Rest of World Based Supercritical CO? Extraction Services Companies and Market Share, 2021-2026
4.5.1 Rest of World Based Supercritical CO? Extraction Services Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies Supercritical CO? Extraction Services Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Supercritical CO? Extraction Services Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Target Component Extraction Type
5.2.2 Impurity Removal and Purification Type
5.3 Market Segment by Type
5.3.1 World Supercritical CO? Extraction Services Market Size by Type (2021-2026)
5.3.2 World Supercritical CO? Extraction Services Market Size by Type (2027-2032)
5.3.3 World Supercritical CO? Extraction Services Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY TOTAL EXTRACTION VESSEL VOLUME

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6.1 World Supercritical CO? Extraction Services Market Size Overview by Total Extraction Vessel Volume: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Total Extraction Vessel Volume
6.2.1 ?50L
6.2.2 ?50L
6.3 Market Segment by Total Extraction Vessel Volume
6.3.1 World Supercritical CO? Extraction Services Market Size by Total Extraction Vessel Volume (2021-2026)
6.3.2 World Supercritical CO? Extraction Services Market Size by Total Extraction Vessel Volume (2027-2032)
6.3.3 World Supercritical CO? Extraction Services Market Size Market Share by Total Extraction Vessel Volume (2027-2032)

7 MARKET ANALYSIS BY EXTRACTION PROCESS PRESSURE

7.1 World Supercritical CO? Extraction Services Market Size Overview by Extraction Process Pressure: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Extraction Process Pressure
7.2.1 ?40MPa
7.2.2 ?40MPa
7.3 Market Segment by Extraction Process Pressure
7.3.1 World Supercritical CO? Extraction Services Market Size by Extraction Process Pressure (2021-2026)
7.3.2 World Supercritical CO? Extraction Services Market Size by Extraction Process Pressure (2027-2032)
7.3.3 World Supercritical CO? Extraction Services Market Size Market Share by Extraction Process Pressure (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Supercritical CO? Extraction Services Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Food & Beverage
8.2.2 Flavors & Flavors
8.2.3 Nutrition & Health
8.2.4 Functional Foods
8.2.5 Other

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8.3 Market Segment by Application
8.3.1 World Supercritical CO? Extraction Services Market Size by Application (2021-2026)
8.3.2 World Supercritical CO? Extraction Services Market Size by Application (2027-2032)
8.3.3 World Supercritical CO? Extraction Services Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 NATECO?
9.1.1 NATECO? Details
9.1.2 NATECO? Major Business
9.1.3 NATECO? Supercritical CO? Extraction Services Product and Services
9.1.4 NATECO? Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 NATECO? Recent Developments/Updates
9.1.6 NATECO? Competitive Strengths & Weaknesses
9.2 Thar Process, Inc.
9.2.1 Thar Process, Inc. Details
9.2.2 Thar Process, Inc. Major Business
9.2.3 Thar Process, Inc. Supercritical CO? Extraction Services Product and Services
9.2.4 Thar Process, Inc. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 Thar Process, Inc. Recent Developments/Updates
9.2.6 Thar Process, Inc. Competitive Strengths & Weaknesses
9.3 Phasex Corporation
9.3.1 Phasex Corporation Details
9.3.2 Phasex Corporation Major Business
9.3.3 Phasex Corporation Supercritical CO? Extraction Services Product and Services
9.3.4 Phasex Corporation Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 Phasex Corporation Recent Developments/Updates
9.3.6 Phasex Corporation Competitive Strengths & Weaknesses
9.4 AINIA / Altex
9.4.1 AINIA / Altex Details
9.4.2 AINIA / Altex Major Business
9.4.3 AINIA / Altex Supercritical CO? Extraction Services Product and Services
9.4.4 AINIA / Altex Supercritical CO? Extraction Services Revenue, Gross Margin and

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Market Share (2021-2026)
9.4.5 AINIA / Altex Recent Developments/Updates
9.4.6 AINIA / Altex Competitive Strengths & Weaknesses
9.5 agroCO?
9.5.1 agroCO? Details
9.5.2 agroCO? Major Business
9.5.3 agroCO? Supercritical CO? Extraction Services Product and Services
9.5.4 agroCO? Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 agroCO? Recent Developments/Updates
9.5.6 agroCO? Competitive Strengths & Weaknesses
9.6 Vidya Herbs Pvt. Ltd.
9.6.1 Vidya Herbs Pvt. Ltd. Details
9.6.2 Vidya Herbs Pvt. Ltd. Major Business
9.6.3 Vidya Herbs Pvt. Ltd. Supercritical CO? Extraction Services Product and Services
9.6.4 Vidya Herbs Pvt. Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Vidya Herbs Pvt. Ltd. Recent Developments/Updates
9.6.6 Vidya Herbs Pvt. Ltd. Competitive Strengths & Weaknesses
9.7 Vesta Nutra
9.7.1 Vesta Nutra Details
9.7.2 Vesta Nutra Major Business
9.7.3 Vesta Nutra Supercritical CO? Extraction Services Product and Services
9.7.4 Vesta Nutra Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Vesta Nutra Recent Developments/Updates
9.7.6 Vesta Nutra Competitive Strengths & Weaknesses
9.8 Canurta Naturals USA
9.8.1 Canurta Naturals USA Details
9.8.2 Canurta Naturals USA Major Business
9.8.3 Canurta Naturals USA Supercritical CO? Extraction Services Product and Services
9.8.4 Canurta Naturals USA Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 Canurta Naturals USA Recent Developments/Updates
9.8.6 Canurta Naturals USA Competitive Strengths & Weaknesses
9.9 Hyperbaric Technologies
9.9.1 Hyperbaric Technologies Details

+357 96 030922
info@marketpublishers.com

9.9.2 Hyperbaric Technologies Major Business
9.9.3 Hyperbaric Technologies Supercritical CO? Extraction Services Product and Services
9.9.4 Hyperbaric Technologies Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Hyperbaric Technologies Recent Developments/Updates
9.9.6 Hyperbaric Technologies Competitive Strengths & Weaknesses
9.10 EXTRATEX
9.10.1 EXTRATEX Details
9.10.2 EXTRATEX Major Business
9.10.3 EXTRATEX Supercritical CO? Extraction Services Product and Services
9.10.4 EXTRATEX Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 EXTRATEX Recent Developments/Updates
9.10.6 EXTRATEX Competitive Strengths & Weaknesses
9.11 Essentia Pura d.o.o.
9.11.1 Essentia Pura d.o.o. Details
9.11.2 Essentia Pura d.o.o. Major Business
9.11.3 Essentia Pura d.o.o. Supercritical CO? Extraction Services Product and Services
9.11.4 Essentia Pura d.o.o. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Essentia Pura d.o.o. Recent Developments/Updates
9.11.6 Essentia Pura d.o.o. Competitive Strengths & Weaknesses
9.12 ECS Nutraceuticals Group
9.12.1 ECS Nutraceuticals Group Details
9.12.2 ECS Nutraceuticals Group Major Business
9.12.3 ECS Nutraceuticals Group Supercritical CO? Extraction Services Product and Services
9.12.4 ECS Nutraceuticals Group Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 ECS Nutraceuticals Group Recent Developments/Updates
9.12.6 ECS Nutraceuticals Group Competitive Strengths & Weaknesses
9.13 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi
9.13.1 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Details
9.13.2 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Major Business
9.13.3 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Supercritical CO? Extraction Services Product and Services

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9.13.4 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Recent Developments/Updates
9.13.6 Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Competitive Strengths & Weaknesses
9.14 Kriya Ltd
9.14.1 Kriya Ltd Details
9.14.2 Kriya Ltd Major Business
9.14.3 Kriya Ltd Supercritical CO? Extraction Services Product and Services
9.14.4 Kriya Ltd Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 Kriya Ltd Recent Developments/Updates
9.14.6 Kriya Ltd Competitive Strengths & Weaknesses
9.15 AVA Plant Co.
9.15.1 AVA Plant Co. Details
9.15.2 AVA Plant Co. Major Business
9.15.3 AVA Plant Co. Supercritical CO? Extraction Services Product and Services
9.15.4 AVA Plant Co. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 AVA Plant Co. Recent Developments/Updates
9.15.6 AVA Plant Co. Competitive Strengths & Weaknesses
9.16 Everserve Nano Bio-Tech Co., Ltd.
9.16.1 Everserve Nano Bio-Tech Co., Ltd. Details
9.16.2 Everserve Nano Bio-Tech Co., Ltd. Major Business
9.16.3 Everserve Nano Bio-Tech Co., Ltd. Supercritical CO? Extraction Services Product and Services
9.16.4 Everserve Nano Bio-Tech Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Everserve Nano Bio-Tech Co., Ltd. Recent Developments/Updates
9.16.6 Everserve Nano Bio-Tech Co., Ltd. Competitive Strengths & Weaknesses
9.17 Kaizuka Genmatsu Co., Ltd.
9.17.1 Kaizuka Genmatsu Co., Ltd. Details
9.17.2 Kaizuka Genmatsu Co., Ltd. Major Business
9.17.3 Kaizuka Genmatsu Co., Ltd. Supercritical CO? Extraction Services Product and Services
9.17.4 Kaizuka Genmatsu Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)

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9.17.5 Kaizuka Genmatsu Co., Ltd. Recent Developments/Updates
9.17.6 Kaizuka Genmatsu Co., Ltd. Competitive Strengths & Weaknesses
9.18 Nutra Pure Extraction
9.18.1 Nutra Pure Extraction Details
9.18.2 Nutra Pure Extraction Major Business
9.18.3 Nutra Pure Extraction Supercritical CO? Extraction Services Product and Services
9.18.4 Nutra Pure Extraction Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 Nutra Pure Extraction Recent Developments/Updates
9.18.6 Nutra Pure Extraction Competitive Strengths & Weaknesses
9.19 BioZest
9.19.1 BioZest Details
9.19.2 BioZest Major Business
9.19.3 BioZest Supercritical CO? Extraction Services Product and Services
9.19.4 BioZest Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.19.5 BioZest Recent Developments/Updates
9.19.6 BioZest Competitive Strengths & Weaknesses
9.20 JMC Co., Ltd.
9.20.1 JMC Co., Ltd. Details
9.20.2 JMC Co., Ltd. Major Business
9.20.3 JMC Co., Ltd. Supercritical CO? Extraction Services Product and Services
9.20.4 JMC Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.20.5 JMC Co., Ltd. Recent Developments/Updates
9.20.6 JMC Co., Ltd. Competitive Strengths & Weaknesses
9.21 New Spectrum Labs
9.21.1 New Spectrum Labs Details
9.21.2 New Spectrum Labs Major Business
9.21.3 New Spectrum Labs Supercritical CO? Extraction Services Product and Services
9.21.4 New Spectrum Labs Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.21.5 New Spectrum Labs Recent Developments/Updates
9.21.6 New Spectrum Labs Competitive Strengths & Weaknesses
9.22 Supercritical Technology Center
9.22.1 Supercritical Technology Center Details
9.22.2 Supercritical Technology Center Major Business

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9.22.3 Supercritical Technology Center Supercritical CO? Extraction Services Product and Services
9.22.4 Supercritical Technology Center Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.22.5 Supercritical Technology Center Recent Developments/Updates
9.22.6 Supercritical Technology Center Competitive Strengths & Weaknesses
9.23 Kirality Pharmaceuticals
9.23.1 Kirality Pharmaceuticals Details
9.23.2 Kirality Pharmaceuticals Major Business
9.23.3 Kirality Pharmaceuticals Supercritical CO? Extraction Services Product and Services
9.23.4 Kirality Pharmaceuticals Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.23.5 Kirality Pharmaceuticals Recent Developments/Updates
9.23.6 Kirality Pharmaceuticals Competitive Strengths & Weaknesses
9.24 Nova Extraction
9.24.1 Nova Extraction Details
9.24.2 Nova Extraction Major Business
9.24.3 Nova Extraction Supercritical CO? Extraction Services Product and Services
9.24.4 Nova Extraction Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.24.5 Nova Extraction Recent Developments/Updates
9.24.6 Nova Extraction Competitive Strengths & Weaknesses
9.25 SKH GmbH
9.25.1 SKH GmbH Details
9.25.2 SKH GmbH Major Business
9.25.3 SKH GmbH Supercritical CO? Extraction Services Product and Services
9.25.4 SKH GmbH Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026)
9.25.5 SKH GmbH Recent Developments/Updates
9.25.6 SKH GmbH Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Supercritical CO? Extraction Services Industry Chain
10.2 Supercritical CO? Extraction Services Upstream Analysis
10.3 Supercritical CO? Extraction Services Midstream Analysis
10.4 Supercritical CO? Extraction Services Downstream Analysis

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11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Supercritical CO? Extraction Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Supercritical CO? Extraction Services Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Supercritical CO? Extraction Services Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Supercritical CO? Extraction Services Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Supercritical CO? Extraction Services Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Supercritical CO? Extraction Services Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Supercritical CO? Extraction Services Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Supercritical CO? Extraction Services Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Supercritical CO? Extraction Services Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Supercritical CO? Extraction Services Players in 2025
Table 12. World Supercritical CO? Extraction Services Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Supercritical CO? Extraction Services Company Evaluation Quadrant
Table 14. Head Office of Key Supercritical CO? Extraction Services Players
Table 15. Supercritical CO? Extraction Services Market: Company Product Type Footprint
Table 16. Supercritical CO? Extraction Services Market: Company Product Application Footprint
Table 17. Supercritical CO? Extraction Services Mergers & Acquisitions Activity
Table 18. United States VS China Supercritical CO? Extraction Services Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Supercritical CO? Extraction Services Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based Supercritical CO? Extraction Services Companies,

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Headquarters (States, Country)
Table 21. United States Based Companies Supercritical CO? Extraction Services Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Supercritical CO? Extraction Services Revenue Market Share (2021-2026)
Table 23. China Based Supercritical CO? Extraction Services Companies, Headquarters (Province, Country)
Table 24. China Based Companies Supercritical CO? Extraction Services Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Supercritical CO? Extraction Services Revenue Market Share (2021-2026)
Table 26. Rest of World Based Supercritical CO? Extraction Services Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Supercritical CO? Extraction Services Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Supercritical CO? Extraction Services Revenue Market Share (2021-2026)
Table 29. World Supercritical CO? Extraction Services Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World Supercritical CO? Extraction Services Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World Supercritical CO? Extraction Services Market Size by Type (2027-2032) & (USD Million)
Table 32. World Supercritical CO? Extraction Services Market Size by Total Extraction Vessel Volume, (USD Million), 2021 & 2025 & 2032
Table 33. World Supercritical CO? Extraction Services Market Size Value by Total Extraction Vessel Volume (2021-2026) & (USD Million)
Table 34. World Supercritical CO? Extraction Services Market Size by Total Extraction Vessel Volume (2027-2032) & (USD Million)
Table 35. World Supercritical CO? Extraction Services Market Size by Extraction Process Pressure, (USD Million), 2021 & 2025 & 2032
Table 36. World Supercritical CO? Extraction Services Market Size Value by Extraction Process Pressure (2021-2026) & (USD Million)
Table 37. World Supercritical CO? Extraction Services Market Size by Extraction Process Pressure (2027-2032) & (USD Million)
Table 38. World Supercritical CO? Extraction Services Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World Supercritical CO? Extraction Services Market Size by Application (2021-2026) & (USD Million)

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Table 40. World Supercritical CO? Extraction Services Market Size by Application (2027-2032) & (USD Million)
Table 41. NATECO? Basic Information, Manufacturing Base and Competitors
Table 42. NATECO? Major Business
Table 43. NATECO? Supercritical CO? Extraction Services Product and Services
Table 44. NATECO? Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. NATECO? Recent Developments/Updates
Table 46. NATECO? Competitive Strengths & Weaknesses
Table 47. Thar Process, Inc. Basic Information, Manufacturing Base and Competitors
Table 48. Thar Process, Inc. Major Business
Table 49. Thar Process, Inc. Supercritical CO? Extraction Services Product and Services
Table 50. Thar Process, Inc. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Thar Process, Inc. Recent Developments/Updates
Table 52. Thar Process, Inc. Competitive Strengths & Weaknesses
Table 53. Phasex Corporation Basic Information, Manufacturing Base and Competitors
Table 54. Phasex Corporation Major Business
Table 55. Phasex Corporation Supercritical CO? Extraction Services Product and Services
Table 56. Phasex Corporation Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Phasex Corporation Recent Developments/Updates
Table 58. Phasex Corporation Competitive Strengths & Weaknesses
Table 59. AINIA / Altex Basic Information, Manufacturing Base and Competitors
Table 60. AINIA / Altex Major Business
Table 61. AINIA / Altex Supercritical CO? Extraction Services Product and Services
Table 62. AINIA / Altex Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. AINIA / Altex Recent Developments/Updates
Table 64. AINIA / Altex Competitive Strengths & Weaknesses
Table 65. agroCO? Basic Information, Manufacturing Base and Competitors
Table 66. agroCO? Major Business
Table 67. agroCO? Supercritical CO? Extraction Services Product and Services
Table 68. agroCO? Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. agroCO? Recent Developments/Updates
Table 70. agroCO? Competitive Strengths & Weaknesses

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Table 71. Vidya Herbs Pvt. Ltd. Basic Information, Manufacturing Base and Competitors
Table 72. Vidya Herbs Pvt. Ltd. Major Business
Table 73. Vidya Herbs Pvt. Ltd. Supercritical CO? Extraction Services Product and Services
Table 74. Vidya Herbs Pvt. Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Vidya Herbs Pvt. Ltd. Recent Developments/Updates
Table 76. Vidya Herbs Pvt. Ltd. Competitive Strengths & Weaknesses
Table 77. Vesta Nutra Basic Information, Manufacturing Base and Competitors
Table 78. Vesta Nutra Major Business
Table 79. Vesta Nutra Supercritical CO? Extraction Services Product and Services
Table 80. Vesta Nutra Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Vesta Nutra Recent Developments/Updates
Table 82. Vesta Nutra Competitive Strengths & Weaknesses
Table 83. Canurta Naturals USA Basic Information, Manufacturing Base and Competitors
Table 84. Canurta Naturals USA Major Business
Table 85. Canurta Naturals USA Supercritical CO? Extraction Services Product and Services
Table 86. Canurta Naturals USA Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Canurta Naturals USA Recent Developments/Updates
Table 88. Canurta Naturals USA Competitive Strengths & Weaknesses
Table 89. Hyperbaric Technologies Basic Information, Manufacturing Base and Competitors
Table 90. Hyperbaric Technologies Major Business
Table 91. Hyperbaric Technologies Supercritical CO? Extraction Services Product and Services
Table 92. Hyperbaric Technologies Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Hyperbaric Technologies Recent Developments/Updates
Table 94. Hyperbaric Technologies Competitive Strengths & Weaknesses
Table 95. EXTRATEX Basic Information, Manufacturing Base and Competitors
Table 96. EXTRATEX Major Business
Table 97. EXTRATEX Supercritical CO? Extraction Services Product and Services
Table 98. EXTRATEX Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. EXTRATEX Recent Developments/Updates

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Table 100. EXTRATEX Competitive Strengths & Weaknesses
Table 101. Essentia Pura d.o.o. Basic Information, Manufacturing Base and Competitors
Table 102. Essentia Pura d.o.o. Major Business
Table 103. Essentia Pura d.o.o. Supercritical CO? Extraction Services Product and Services
Table 104. Essentia Pura d.o.o. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Essentia Pura d.o.o. Recent Developments/Updates
Table 106. Essentia Pura d.o.o. Competitive Strengths & Weaknesses
Table 107. ECS Nutraceuticals Group Basic Information, Manufacturing Base and Competitors
Table 108. ECS Nutraceuticals Group Major Business
Table 109. ECS Nutraceuticals Group Supercritical CO? Extraction Services Product and Services
Table 110. ECS Nutraceuticals Group Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. ECS Nutraceuticals Group Recent Developments/Updates
Table 112. ECS Nutraceuticals Group Competitive Strengths & Weaknesses
Table 113. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Basic Information, Manufacturing Base and Competitors
Table 114. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Major Business
Table 115. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Supercritical CO? Extraction Services Product and Services
Table 116. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Recent Developments/Updates
Table 118. Jiangsu Jiangdayuan Shengtai Shengwu Keji Gufen Youxian Gongsi Competitive Strengths & Weaknesses
Table 119. Kriya Ltd Basic Information, Manufacturing Base and Competitors
Table 120. Kriya Ltd Major Business
Table 121. Kriya Ltd Supercritical CO? Extraction Services Product and Services
Table 122. Kriya Ltd Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Kriya Ltd Recent Developments/Updates
Table 124. Kriya Ltd Competitive Strengths & Weaknesses

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Table 125. AVA Plant Co. Basic Information, Manufacturing Base and Competitors
Table 126. AVA Plant Co. Major Business
Table 127. AVA Plant Co. Supercritical CO? Extraction Services Product and Services
Table 128. AVA Plant Co. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. AVA Plant Co. Recent Developments/Updates
Table 130. AVA Plant Co. Competitive Strengths & Weaknesses
Table 131. Everserve Nano Bio-Tech Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 132. Everserve Nano Bio-Tech Co., Ltd. Major Business
Table 133. Everserve Nano Bio-Tech Co., Ltd. Supercritical CO? Extraction Services Product and Services
Table 134. Everserve Nano Bio-Tech Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Everserve Nano Bio-Tech Co., Ltd. Recent Developments/Updates
Table 136. Everserve Nano Bio-Tech Co., Ltd. Competitive Strengths & Weaknesses
Table 137. Kaizuka Genmatsu Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 138. Kaizuka Genmatsu Co., Ltd. Major Business
Table 139. Kaizuka Genmatsu Co., Ltd. Supercritical CO? Extraction Services Product and Services
Table 140. Kaizuka Genmatsu Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. Kaizuka Genmatsu Co., Ltd. Recent Developments/Updates
Table 142. Kaizuka Genmatsu Co., Ltd. Competitive Strengths & Weaknesses
Table 143. Nutra Pure Extraction Basic Information, Manufacturing Base and Competitors
Table 144. Nutra Pure Extraction Major Business
Table 145. Nutra Pure Extraction Supercritical CO? Extraction Services Product and Services
Table 146. Nutra Pure Extraction Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. Nutra Pure Extraction Recent Developments/Updates
Table 148. Nutra Pure Extraction Competitive Strengths & Weaknesses
Table 149. BioZest Basic Information, Manufacturing Base and Competitors
Table 150. BioZest Major Business
Table 151. BioZest Supercritical CO? Extraction Services Product and Services
Table 152. BioZest Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 153. BioZest Recent Developments/Updates
Table 154. BioZest Competitive Strengths & Weaknesses
Table 155. JMC Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 156. JMC Co., Ltd. Major Business
Table 157. JMC Co., Ltd. Supercritical CO? Extraction Services Product and Services
Table 158. JMC Co., Ltd. Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 159. JMC Co., Ltd. Recent Developments/Updates
Table 160. JMC Co., Ltd. Competitive Strengths & Weaknesses
Table 161. New Spectrum Labs Basic Information, Manufacturing Base and Competitors
Table 162. New Spectrum Labs Major Business
Table 163. New Spectrum Labs Supercritical CO? Extraction Services Product and Services
Table 164. New Spectrum Labs Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 165. New Spectrum Labs Recent Developments/Updates
Table 166. New Spectrum Labs Competitive Strengths & Weaknesses
Table 167. Supercritical Technology Center Basic Information, Manufacturing Base and Competitors
Table 168. Supercritical Technology Center Major Business
Table 169. Supercritical Technology Center Supercritical CO? Extraction Services Product and Services
Table 170. Supercritical Technology Center Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 171. Supercritical Technology Center Recent Developments/Updates
Table 172. Supercritical Technology Center Competitive Strengths & Weaknesses
Table 173. Kirality Pharmaceuticals Basic Information, Manufacturing Base and Competitors
Table 174. Kirality Pharmaceuticals Major Business
Table 175. Kirality Pharmaceuticals Supercritical CO? Extraction Services Product and Services
Table 176. Kirality Pharmaceuticals Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 177. Kirality Pharmaceuticals Recent Developments/Updates
Table 178. Kirality Pharmaceuticals Competitive Strengths & Weaknesses
Table 179. Nova Extraction Basic Information, Manufacturing Base and Competitors
Table 180. Nova Extraction Major Business
Table 181. Nova Extraction Supercritical CO? Extraction Services Product and Services

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Table 182. Nova Extraction Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 183. Nova Extraction Recent Developments/Updates
Table 184. Nova Extraction Competitive Strengths & Weaknesses
Table 185. SKH GmbH Basic Information, Manufacturing Base and Competitors
Table 186. SKH GmbH Major Business
Table 187. SKH GmbH Supercritical CO? Extraction Services Product and Services
Table 188. SKH GmbH Supercritical CO? Extraction Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 189. SKH GmbH Recent Developments/Updates
Table 190. SKH GmbH Competitive Strengths & Weaknesses
Table 191. Global Key Players of Supercritical CO? Extraction Services Upstream (Raw Materials)
Table 192. Global Supercritical CO? Extraction Services Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Supercritical CO? Extraction Services Picture
Figure 2. World Supercritical CO? Extraction Services Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Supercritical CO? Extraction Services Total Revenue (2021-2032) & (USD Million)
Figure 4. World Supercritical CO? Extraction Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Supercritical CO? Extraction Services Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Supercritical CO? Extraction Services Revenue (2021-2032) & (USD Million)
Figure 13. Supercritical CO? Extraction Services Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 16. World Supercritical CO? Extraction Services Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 18. China Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 23. India Supercritical CO? Extraction Services Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Supercritical CO? Extraction Services by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Supercritical CO? Extraction Services Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Supercritical CO? Extraction Services Markets in 2025
Figure 27. United States VS China: Supercritical CO? Extraction Services Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Supercritical CO? Extraction Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Supercritical CO? Extraction Services Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World Supercritical CO? Extraction Services Market Size Market Share by Type in 2025
Figure 31. Target Component Extraction Type
Figure 32. Impurity Removal and Purification Type
Figure 33. World Supercritical CO? Extraction Services Market Size Market Share by Type (2021-2032)
Figure 34. World Supercritical CO? Extraction Services Market Size by Total Extraction Vessel Volume, (USD Million), 2021 & 2025 & 2032
Figure 35. World Supercritical CO? Extraction Services Market Size Market Share by Total Extraction Vessel Volume in 2025
Figure 36. ?50L
Figure 37. ?50L
Figure 38. World Supercritical CO? Extraction Services Market Size Market Share by Total Extraction Vessel Volume (2021-2032)
Figure 39. World Supercritical CO? Extraction Services Market Size by Extraction Process Pressure, (USD Million), 2021 & 2025 & 2032
Figure 40. World Supercritical CO? Extraction Services Market Size Market Share by Extraction Process Pressure in 2025
Figure 41. ?40MPa

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Figure 42. ?40MPa
Figure 43. World Supercritical CO? Extraction Services Market Size Market Share by Extraction Process Pressure (2021-2032)
Figure 44. World Supercritical CO? Extraction Services Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 45. World Supercritical CO? Extraction Services Market Size Market Share by Application in 2025
Figure 46. Food & Beverage
Figure 47. Flavors & Flavors
Figure 48. Nutrition & Health
Figure 49. Functional Foods
Figure 50. Other
Figure 51. World Supercritical CO? Extraction Services Market Size Market Share by Application (2021-2032)
Figure 52. Supercritical CO? Extraction Services Industrial Chain
Figure 53. Methodology
Figure 54. Research Process and Data Source

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