

# **Cryogenic Equipment Market Report by Equipment (Tanks, Pumps, Heat Exchanger, Valves, and Others), Cryogen (Nitrogen, Liquefied Natural Gas, Helium, and Others), Application (Storage, Transportation, Processing, and Others), End Use Industry (Oil and Gas, Energy and Power, Food and Beverages, Healthcare, Marine and Aerospace, Chemicals, and Others), and Region 2023-2028**

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## **Abstracts**

The global cryogenic equipment market size reached US\$ 20.7 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 27.91 Billion by 2028, exhibiting a growth rate (CAGR) of 5.1% during 2022-2028. The increasing adoption of advanced technology, the rising product demand in the healthcare industry for several applications, the growing product uptake in various food processing applications, and the escalating uptake of renewable energy sources are some of the factors propelling the market.

Cryogenic equipment comprises specialized machinery essential for various applications demanding extremely low temperatures. These frigid conditions are achieved using cryogenic fluids like liquid nitrogen and helium. It finds extensive utility in diverse industries, including aerospace, healthcare, electronics, and energy production. In aerospace, it facilitates the storage and transportation of crucial components like liquid oxygen and liquid hydrogen, which are vital for space exploration. Moreover, it plays a pivotal role in healthcare by storing and delivering medical essentials such as blood, organs, and samples. In the electronics sector, it aids in cooling electronic components, enhancing precision in manufacturing. Additionally, it supports energy production, particularly in liquefied natural gas production for various energy

applications. Its global popularity stems from its capacity to deliver exceptionally low temperatures for numerous industrial processes.

The global market is majorly driven by the increasing demand for liquefied natural gas (LNG) as a cleaner energy source. In line with this, the healthcare sector relies on cryogenic equipment for the safe preservation and transport of medical samples, organs, and vaccines, further boosting market expansion, especially in light of the global healthcare challenges. Furthermore, the aerospace industry's increasing space exploration requires cryogenic equipment to store and handle components like liquid oxygen and hydrogen, creating a substantial market niche. In electronics manufacturing, the need for precise temperature control to enhance production efficiency fuels the adoption of cryogenic cooling systems. Moreover, ongoing technological advancements in cryogenic storage and transportation solutions and favorable government regulations accelerate market growth. The automotive sector is also contributing, with a rising demand for cryogenic equipment for vehicle propulsion systems utilizing hydrogen as a fuel source. As sustainability gains prominence, using cryogenic equipment to reduce greenhouse gas emissions through carbon capture and storage presents new growth opportunities.

**Cryogenic Equipment Market Trends/Drivers:**

**Rapid industrialization**

Rapid industrialization worldwide is offering numerous opportunities for the market. As industries expand and diversify, the demand for cryogenic equipment rises in tandem. These industries often require extremely low-temperature solutions for various applications. In the chemical and petrochemical sector, for instance, this equipment is essential for the separation and liquefaction of gases, aiding in producing industrial gases, chemicals, and LNG. Additionally, the expanding pharmaceutical industry relies on it for the cryopreservation of biological materials, such as cell cultures and vaccines, ensuring their stability and efficacy. Furthermore, the food processing industry utilizes cryogenic freezing and cooling systems to maintain product quality, extend shelf life, and meet stringent safety standards. As developing countries undergo rapid industrialization, there's an increasing need for cryogenic equipment in these emerging markets, further fueling market growth.

**Increasing product demand in research and development activities**

The increasing product demand in research and development (R&D) activities bolsters the market. Cryogenic equipment is indispensable in various scientific disciplines, such as physics, chemistry, and biology, where ultra-low temperatures are required for experiments and analysis. It cools superconducting materials in physics, enabling breakthroughs in quantum computing and energy transmission. In chemistry, it aids in studying chemical reactions at extremely low temperatures, contributing to the development of new materials and pharmaceuticals. Additionally, it plays a pivotal role

in biotechnology and life sciences by preserving biological samples, facilitating genetic research, and storing cells and tissues for regenerative medicine. As R&D efforts intensify across industries, including pharmaceuticals, electronics, and material science, the demand for precise and reliable cryogenic equipment grows. This equipment empowers researchers to explore new frontiers and make innovative discoveries, driving the market's expansion. Furthermore, advancements in cryogenic technology continue to enhance its versatility and efficiency, making it an indispensable tool for scientists and researchers worldwide.

**Rising product utilization to store and transport renewable energy sources**

The rising product utilization to store and transport renewable energy sources fosters market growth. Cryogenic systems, particularly liquid hydrogen, and liquid oxygen storage, are crucial in the emerging field of renewable energy. These systems play a pivotal role in storing excess energy generated from renewable sources, such as wind and solar power, which can be used during low energy production or high demand. Moreover, cryogenic energy storage offers a scalable and environmentally friendly solution for grid stability, helping to balance the intermittency of renewable sources and ensuring a consistent power supply. The transition to clean energy sources has prompted increased investments in cryogenic infrastructure, including liquefied natural gas (LNG) for energy storage and transportation. As the world shifts towards sustainable energy solutions, the demand for cryogenic equipment in this context will continue rising, creating substantial growth opportunities for the cryogenic equipment market. This factor aligns with global efforts to reduce carbon emissions and transition to more environmentally friendly energy solutions, making cryogenic equipment a vital component in the renewable energy landscape.

**Cryogenic Equipment Industry Segmentation:**

IMARC Group provides an analysis of the key trends in each segment of the global cryogenic equipment market report, along with forecasts at the global, country, and regional levels for 2023-2028. Our report has categorized the market based on equipment, cryogen, application, and end use industry.

**Breakup by Equipment:**

Tanks

Pumps

Heat Exchanger

Valves

Others

Tanks dominates the market

The report has provided a detailed breakup and analysis of the market based on the equipment. This includes tanks, pumps, heat exchanger, valves, and others. According to the report, tanks represented the largest segment.

Cryogenic tanks are indispensable for storing and transporting liquefied gases, such as liquid nitrogen, liquid oxygen, and liquefied natural gas (LNG). The increasing demand for LNG as a cleaner energy source and the expanding applications of cryogenic gases across industries like healthcare, aerospace, and electronics are propelling the need for these tanks. Furthermore, the development of smaller, more portable cryogenic tanks is opening new avenues for applications in healthcare, laboratories, and even emerging industries like space tourism.

The ever-growing focus on sustainability and reducing carbon emissions also drives the adoption of cryogenic tanks for storing renewable energy sources. As these tanks evolve to meet diverse requirements and environmental standards, they continue to be a linchpin in the market's expansion, facilitating the safe and efficient handling of cryogenic materials across various industries.

Breakup by Cryogen:

Nitrogen

Liquefied Natural Gas

Helium

Others

Liquefied natural gas dominates the market

The report has provided a detailed breakup and analysis of the market based on the cryogen. This includes nitrogen, liquefied natural gas, helium, and others. According to the report, liquefied natural gas represented the largest segment.

LNG is a supercooled form of natural gas, stored and transported at extremely low temperatures. The global transition toward cleaner energy sources has propelled the demand for LNG, making it a focal point in the cryogenic equipment market. Cryogenic technology, including specialized storage tanks and transport infrastructure, is pivotal in LNG's liquefaction, storage, and regasification. Its versatility spans multiple sectors, from powering vehicles to serving as a feedstock for various industries.

Compared to traditional fossil fuels, its role in reducing greenhouse gas emissions aligns with environmental goals. The LNG supply chain, reliant on cryogenic equipment, continuously evolves to meet growing energy demands and regulatory standards. As nations seek to reduce carbon footprints and embrace cleaner energy alternatives, the LNG sector's expansion underscores the importance of cryogenic equipment. This segment not only contributes to energy accessibility but also aligns with global sustainability efforts, emphasizing its prominent role in the future of energy and the cryogenic equipment market.

Breakup by Application:

Storage

Transportation

Processing

## Others

Storage dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes storage, transportation, processing, and others. According to the report, storage represented the largest segment.

Cryogenic storage involves safely preserving and containing materials at ultra-low temperatures, typically below -150 degrees Celsius (-238 degrees Fahrenheit). This application is fundamental in various industries, such as healthcare, biotechnology, energy, and aerospace. In healthcare, cryogenic storage is vital for preserving biological specimens, including cells, tissues, and genetic material, ensuring their viability for research, diagnostics, and medical treatments. Biotechnology companies rely on it to maintain valuable samples and compounds, supporting drug development and bioprocessing.

Furthermore, the energy sector utilizes cryogenic storage for liquefied natural gas (LNG), enabling efficient transportation and storage of clean energy. The aerospace industry depends on it for safely handling propellants like liquid oxygen and liquid hydrogen, which are essential for space exploration. As the demand for cryogenic storage solutions grows across these diverse industries, the cryogenic equipment market witnesses consistent expansion. Advancements in cryogenic storage technologies and the need for secure and environmentally friendly storage solutions further drive this segment's importance, underlining its crucial role in various sectors and the overall market.

Breakup by End Use Industry:

Oil and Gas

Energy and Power

Food and Beverages

Healthcare

Marine and Aerospace

Chemicals

Others

Chemicals dominate the market

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes oil and gas, energy and power, food and beverages, healthcare, marine and aerospace, chemicals, and others. According to the report, chemicals represented the largest segment.

Cryogenic equipment plays a critical role in the chemical sector by enabling the safe and efficient handling of gases and chemicals at extremely low temperatures. One prominent application is in the separation and purification of gases. Cryogenic distillation units utilize cryogenic equipment to separate gases like nitrogen, oxygen,

and argon from air. These gases find essential applications in various industries, including manufacturing, healthcare, and electronics. The chemicals industry also relies on cryogenic storage solutions to store and transport liquefied gases and chemicals. Cryogenic tanks and containers ensure these materials' stability and safe handling, supporting chemical production and distribution.

Moreover, cryogenic cooling systems are employed in chemical processes to enable precise temperature control, enhancing the efficiency and quality of chemical manufacturing. This capability is crucial in pharmaceutical sectors, where precise temperature control is paramount. As the chemicals industry continues to expand and evolve, driven by manufacturing demands and regulatory requirements, the cryogenic equipment market remains a key enabler of its growth, providing essential tools for safe and efficient operations.

#### Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The market research report has also provided a comprehensive analysis of all the major

regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific rapid industrialization and urbanization drive the demand for cryogenic equipment across various industries. Robust growth in sectors like manufacturing, chemicals, and healthcare necessitates using cryogenic technology for processes, storage, and transportation. Furthermore, the growing population and increasing disposable income levels in countries like China and India propel the healthcare and pharmaceutical sectors. Cryogenic equipment is integral in these sectors for storing and preserving medical samples, vaccines, and biological materials.

Moreover, the region is witnessing substantial advancements in space exploration and research, creating a need for cryogenic equipment in aerospace applications. Besides, as countries in the region prioritize sustainable and eco-friendly energy solutions, the use of cryogenic equipment for liquefied natural gas (LNG) production and storage is expanding. Additionally, the region's strong manufacturing base and growing technological capabilities contribute to the production and innovation of cryogenic equipment.

#### Competitive Landscape:

Top companies are strengthening market growth through a combination of strategic initiatives. They are heavily investing in research and development, continually innovating and improving the efficiency and performance of cryogenic equipment. This not only caters to the growing demands of various industries but also promotes the adoption of these advanced solutions. Additionally, these companies are expanding their global presence by establishing partnerships, distribution networks, and manufacturing facilities in key regions, ensuring a wider reach and accessibility for their products. Furthermore, they prioritize sustainability by developing eco-friendly and energy-efficient cryogenic systems, aligning with global environmental regulations and the demand for greener technologies. Moreover, top players actively engage in mergers and acquisitions to broaden their product portfolios and gain access to complementary technologies, strengthening their market position. They also provide comprehensive customer support and after-sales services, enhancing customer satisfaction and loyalty. They leverage digitalization and Industry 4.0 technologies like IoT and data analytics to offer predictive maintenance and remote monitoring solutions, improving equipment reliability and minimizing downtime.

The report has provided a comprehensive analysis of the competitive landscape in the cryogenic equipment market. Detailed profiles of all major companies have also been provided.

Air Liquide S.A.  
Air Products and Chemicals Inc.  
Chart Industries Inc.  
Cryofab Inc.  
Cryoquip LLC (Nikkiso Co. Ltd.)  
Emerson Electric Co.  
Flowserve Corporation  
Herose GmbH  
INOX India Pvt. Ltd  
Linde Plc

Parker-Hannifin Corporation

Wessington Cryogenics

Recent Developments:

In July 2023, Air Liquide S.A. announced approx. 200 Million U.S. dollars investment in two advanced material production centers in Taiwan and South Korea to accelerate the development and production of new advanced materials while improving the reliability and sustainability of its supply chain by localizing the production close to its semiconductor customers.

In July 2023, Air Products and Chemicals Inc. announced that it will be providing oxygen equipment for one of North America's largest wastewater treatment plants in Montreal, Quebec, Canada.

In August 2023, Chart Industries Inc announced its collaboration with 8 Rivers Capital, LLC ('8 Rivers'), a reputed climate technology company leading the energy industry towards achieving Net Zero, to evaluate 8 Rivers' portfolio of proprietary licensable technologies and processes and identify where Chart's technologies and systems can bring added value to the 8 Rivers offerings.

Key Questions Answered in This Report

1. How big is the global cryogenic equipment market?
2. What is the expected growth rate of the global cryogenic equipment market during 2023-2028?
3. What are the key factors driving the global cryogenic equipment market?
4. What has been the impact of COVID-19 on the global cryogenic equipment market?
5. What is the breakup of the global cryogenic equipment market based on the equipment?
6. What is the breakup of the global cryogenic equipment market based on the cryogen?
7. What is the breakup of the global cryogenic equipment market based on the application?
8. What is the breakup of the global cryogenic equipment market based on the end use



industry?

9. What are the key regions in the global cryogenic equipment market?

10. Who are the key players/companies in the global cryogenic equipment market?

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