

Argon Gas Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028

Segmented By Form (Gas, Liquid Argon Gas), By End-User (Healthcare, Food & Beverages, Electronics, Manufacturing, Others), By Region, Competition

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Abstracts

Global Argon Gas Market was valued at USD 10.19 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.91% through 2028. Argon is a colorless, odorless, inert noble gas that is naturally occurring in the Earth's atmosphere. It is extracted through air separation processes and is widely used for its inert properties, high purity, and versatility. The global argon gas market encompasses the production, distribution, and application of argon gas across a multitude of industries.

The global argon gas market has experienced steady growth over the years. It is influenced by several key industries, including manufacturing, healthcare, electronics, and food and beverage. The market size is substantial, and its growth is driven by the increasing demand for argon gas in various applications.

Key Market Drivers

Increasing Demand in the Metal Industry

The increasing demand in the metal industry is a significant market driver for the global argon gas market. Argon gas is extensively used in the metal industry, primarily in arc welding, which plays a crucial role in various applications like construction, manufacturing, and aerospace. Argon gas is widely used in various welding processes, with one of the most common being gas tungsten arc welding (GTAW) or TIG (tungsten

inert gas) welding. In this process, argon gas is used as a shielding gas to protect the weld zone from atmospheric contamination, preventing the oxidation of metals during the welding process. As the metal industry continues to grow, there is a parallel increase in demand for high-quality welds, which in turn drives the need for argon gas.

The construction industry, which includes infrastructure development, residential and commercial construction, relies heavily on argon gas for welding structural components. As urbanization and population growth continue, there is a sustained demand for construction materials and services, leading to a higher demand for argon gas. The quality and durability of welds are essential in ensuring the structural integrity of buildings and infrastructure projects. The automotive sector is a significant consumer of argon gas. Welding is a fundamental process in automotive manufacturing, used for assembling various components, such as chassis, engine parts, and exhaust systems. The growth of the automotive industry, driven by factors like consumer demand for vehicles, technological advancements, and the shift toward electric vehicles, results in a continuous requirement for argon gas in welding applications.

The aerospace industry places extremely high demands on the quality and integrity of welds due to the critical nature of its components. Argon gas is used for welding and fabricating parts in the aerospace sector, contributing to the strength and reliability of aircraft and spacecraft. As commercial air travel and space exploration continue to advance, there is a concurrent need for the production and maintenance of aerospace components, thus driving demand for argon gas. The development of new and advanced metal alloys with improved properties and characteristics often necessitates specialized welding techniques that use argon gas. As industries seek to create stronger, more lightweight, and corrosion-resistant materials, argon gas remains a critical component in the welding of these alloys. The pursuit of innovative materials drives the demand for argon gas in metalworking.

Growing Need in Electronics and Semiconductors

The growing need in electronics and semiconductors is a significant market driver for the global argon gas market. Argon gas, known for its inert properties and high purity, plays a critical role in various processes within the electronics and semiconductor industries. In semiconductor fabrication, argon gas is used in several key processes, including chemical vapor deposition (CVD) and physical vapor deposition (PVD). These processes are fundamental for creating integrated circuits and thin-film structures used in electronic devices. As the demand for smaller, more powerful, and energy-efficient

electronic components continues to rise, semiconductor manufacturers require a stable and contamination-free environment. Argon gas is employed as a carrier gas and as a purge gas to create the desired conditions, ensuring high-quality semiconductor production.

Electronics and semiconductors demand the utmost purity in gases used during manufacturing processes to prevent contamination that can lead to defects in semiconductor devices. Argon, with its high level of purity and inertness, is favored for applications like ion implantation and sputter deposition. The semiconductor industry's stringent purity standards drive the need for high-purity argon gas. The proliferation of consumer electronics, including smartphones, tablets, and laptops, has been a major factor driving the semiconductor industry. As consumers seek more advanced and compact electronic devices, semiconductor manufacturers must scale up production to meet the growing demand. This expansion naturally leads to an increased requirement for argon gas in semiconductor manufacturing.

Emerging display technologies such as OLED (Organic Light Emitting Diodes) and microLED displays require precise deposition of organic and inorganic materials. Argon gas, as a carrier gas, is used in processes like atomic layer deposition (ALD) to achieve the required film uniformity and quality. The continuous development and adoption of these advanced display technologies further bolster the demand for argon gas. The lighting industry is transitioning to more energy-efficient solutions, such as LED (Light Emitting Diode) lighting. The manufacturing of LEDs involves processes like sputter deposition, which utilizes argon gas to create high-quality thin films on LED substrates. The global push toward energy-efficient lighting solutions contributes to the growing demand for argon gas. Ongoing research and development in the electronics and semiconductor fields drive the demand for argon gas. Emerging technologies, materials, and manufacturing techniques often require specialized environments that incorporate argon gas. R&D activities aimed at enhancing the performance and efficiency of electronic components continuously push the boundaries of argon gas utilization.

Expanding Healthcare Applications

The expanding healthcare applications of argon gas are a significant market driver for the global argon gas market. Argon, a colorless, odorless, and inert gas, finds numerous medical uses due to its unique properties. Argon gas is used in cryopreservation, the process of preserving biological materials, such as cells, tissues, and organs, at extremely low temperatures. This technique is crucial for long-term storage and research purposes. Argon gas serves as a cryoprotectant and is used to

minimize ice formation during freezing, preventing damage to the biological material. The growth of biobanking and life sciences research has significantly increased the demand for argon gas in these applications.

Argon gas is utilized in cryosurgery, a minimally invasive medical procedure that employs extreme cold to destroy abnormal or cancerous tissue. It is a preferred method for its precision and ability to minimize damage to surrounding healthy tissue. As the healthcare industry continuously seeks innovative and less invasive treatment options, the use of argon gas in cryosurgery is on the rise. Medical lasers, particularly in ophthalmology, dermatology, and various surgical procedures, rely on argon gas as a medium for laser technology. Argon lasers are used in treatments such as retinal photocoagulation, skin resurfacing, and vascular surgery. The expansion of laser medicine and the increasing demand for precise and effective medical treatments contribute to the growing need for argon gas in healthcare applications.

In the field of assisted reproductive technologies (ART), such as in vitro fertilization (IVF), argon gas is used in the vitrification of embryos and oocytes. This method allows for the rapid and safe freezing of reproductive cells, maintaining their viability for future use. As fertility treatments become more prevalent, the demand for argon gas in this specialized medical area is on the rise. Argon gas plays a role in tissue engineering and regenerative medicine, where cells and biomaterials are combined to create functional tissues or organs. Maintaining a sterile and controlled environment is essential in these processes, and argon gas is used for its inert and non-reactive properties to facilitate tissue culture and cell growth. The ongoing research and development in regenerative medicine contribute to the demand for argon gas. The healthcare industry relies on various diagnostic instruments, such as mass spectrometers, which utilize argon gas as a collision gas in mass spectrometry. These instruments are essential for clinical laboratories, research, and diagnostics. As healthcare services and diagnostic capabilities continue to advance, the demand for these technologies' increases, consequently boosting the need for argon gas.

Rising Use in Food and Beverage Packaging

The rising use of argon gas in food and beverage packaging is a notable market driver for the global argon gas market. Argon, an inert and colorless gas, is used to extend the shelf life of various perishable products by displacing oxygen, which can lead to spoilage and degradation. Argon gas is a vital component of Modified Atmosphere Packaging (MAP), a technique used in the food and beverage industry to prolong the shelf life of products. In MAP, argon is combined with other gases like nitrogen and

carbon dioxide to create a controlled atmosphere within the packaging. This controlled environment helps slow down the growth of microorganisms and oxidative reactions that cause food spoilage. As consumer demand for fresh and convenient packaged foods increases, so does the use of argon gas in MAP.

Argon gas is commonly used to package perishable items such as fresh fruits, vegetables, dairy products, and various meat products. By reducing the oxygen content within the packaging, argon helps prevent the oxidation and degradation of food, which extends its freshness and quality. As consumer preferences shift towards healthier and minimally processed foods, the demand for argon gas in preserving the freshness of these products continues to rise.

The wine industry relies on argon gas for wine preservation in bottles. Argon is heavier than air, and when injected into an open wine bottle, it forms a protective layer that prevents oxidation and spoilage of the wine. The global wine market continues to grow, and wine enthusiasts appreciate the ability to enjoy their favorite wines over an extended period, making argon gas an essential tool for wine preservation. Argon is used in beverage packaging to ensure consistent carbonation levels and protect the product from external contaminants. It is particularly important in the production of premium and specialty beverages, where maintaining the desired carbonation level is critical for flavor and quality. The increasing demand for various carbonated beverages contributes to the use of argon gas in this aspect of the industry. Innovations in packaging technologies and materials, combined with the use of argon gas, provide consumers with convenience and longer shelf life for a wide range of food and beverage products. These improved packaging solutions address consumer concerns about food safety, quality, and sustainability, further driving the demand for argon gas.

Key Market Challenges

Price Volatility and Supply Chain Disruptions

Argon gas is a byproduct of air separation processes, and its availability and price are closely tied to the demand for other gases produced during the same processes, such as oxygen and nitrogen. This dependence on the supply and demand dynamics of the broader industrial gas market can result in price volatility. Supply chain disruptions, geopolitical instability, or changes in the energy market can impact the production and distribution of argon gas. Sudden fluctuations in prices and availability can make it challenging for end-users to plan and budget for their argon gas requirements, potentially slowing down the growth of the market.

Environmental and Regulatory Concerns

The industrial gas sector, including argon gas production, is subject to environmental regulations, safety standards, and emissions controls. Argon gas production can generate waste gases and emissions, raising environmental concerns. Stricter regulations and requirements for emissions reductions can increase operational costs for gas producers. Moreover, evolving environmental standards may necessitate technology upgrades and increased compliance efforts. These factors can affect the cost structure of argon gas production and have an impact on market growth.

Competition from Alternative Gases and Technologies

Argon gas competes with other gases and technologies for various applications. For instance, in welding, argon gas competes with alternative shielding gases like helium and carbon dioxide. Advances in materials science and welding technologies may also introduce new alternatives to traditional welding processes. In the electronics industry, where argon is used for semiconductor manufacturing, technological advancements could lead to alternative manufacturing methods that require different gases or materials. The substitution of argon with alternative gases or technologies poses a challenge to the growth of the argon gas market.

Key Market Trends

Sustainability and Environmental Responsibility:

One of the most significant trends in the argon gas market is the growing emphasis on sustainability and environmental responsibility. Companies and industries are increasingly aware of their environmental footprint and are seeking ways to reduce emissions and minimize the environmental impact of their operations. Argon gas, with its inert and non-reactive properties, is seen as a more environmentally friendly choice compared to other gases, particularly in industrial applications. As industries aim to meet sustainability goals and comply with environmental regulations, the demand for argon gas is rising, especially in applications where its properties are critical for reducing emissions.

argon is used in the electronics industry for processes like semiconductor manufacturing, where strict purity and contamination control are essential. The environmentally responsible use of argon gas aligns with the growing trend of green and

sustainable manufacturing practices.

Advancements in Health and Medical Technologies

The healthcare sector is experiencing a significant transformation with advancements in medical technologies. Argon gas plays a crucial role in this trend, particularly in the fields of cryopreservation, cryosurgery, and regenerative medicine. Cryopreservation is used for the long-term storage of biological materials, including stem cells and tissues, and has become a valuable resource for research and medical treatments. Cryosurgery, a minimally invasive surgical technique, benefits from the precision and safety offered by argon gas. Moreover, argon gas is essential for maintaining sterile environments in tissue engineering and regenerative medicine. As medical technologies continue to evolve, the demand for argon gas in these healthcare applications is expected to grow. The potential for groundbreaking medical breakthroughs and the development of new treatments further contribute to this trend.

Technological Innovations and Diversification of Applications

Argon gas is finding new applications and innovations across various industries. Its unique properties, such as its ability to create controlled atmospheres and its inert nature, make it suitable for a wide range of applications beyond its traditional uses in welding and electronics. For example, it is increasingly used in the 3D printing industry for metal powder production, as well as in advanced materials research for its role in protective atmospheres during high-temperature processing.

Moreover, the advent of Industry 4.0 and the Internet of Things (IoT) has led to an increased focus on automation and data-driven manufacturing. Argon gas, as a critical element in laser technology used for cutting and welding, is playing a role in the growth of these technologies, especially in the automotive and aerospace sectors. The diversification of applications for argon gas underscores its versatility and adaptability to meet evolving industrial needs. As more industries recognize the value of argon gas in their processes, the market continues to expand and diversify.

Segmental Insights

Form Insights

Based on the category of Form, the Gas segment emerged as the dominant player in the global market for Argon Gas in 2022. Gaseous argon is widely used in both

industrial and specialty applications. In its gaseous form, argon is essential for processes like welding, where it is used as a shielding gas to protect metals from oxidation during high-temperature welding operations. Argon's inert properties, such as non-reactivity and high thermal conductivity, make it a preferred choice in various welding applications, including TIG (tungsten inert gas) and MIG (metal inert gas) welding. This dominance in welding is a significant driver of the gas segment's dominance in the argon gas market.

Gaseous argon can be produced with a high level of purity, typically ranging from commercial-grade to high-purity and ultra-high-purity forms. High-purity argon gas is vital in the electronics and semiconductor industries, where any contaminants can compromise the performance of electronic components. It is used in the manufacturing of semiconductors, flat-panel displays, and other electronic devices. The strict purity and quality control requirements in these industries make gaseous argon the preferred form.

In industrial and medical sectors, argon gas is used in its gaseous form for various applications. In the medical field, gaseous argon is used in cryosurgery, where it provides precise and controlled tissue freezing for medical procedures. In industries, gaseous argon is employed in processes like annealing, where it helps control material properties in heat treatment. It also serves as a blanketing gas to protect liquids and materials from oxygen and contamination. The gas segment dominates in the packaging industry as well. Argon gas is used as part of Modified Atmosphere Packaging (MAP) techniques. In MAP, a mixture of gases, including argon, is used to extend the shelf life of food and beverages. Argon's role in displacing oxygen and preventing food spoilage makes it an essential component in food preservation and packaging. These factors are expected to drive the growth of this segment.

End-User Insights

The Manufacturing segment is projected to experience rapid growth during the forecast period. Argon gas plays a crucial role in welding, particularly in processes like TIG (tungsten inert gas) and MIG (metal inert gas) welding. It is used as a shielding gas to protect metals from oxidation during high-temperature welding, ensuring high-quality and durable welds. The manufacturing sector heavily relies on welding for joining, repairing, and fabricating metal components, making argon gas indispensable for welding applications. As the manufacturing industry grows, so does the demand for argon gas in metal fabrication.

Both the aerospace and automotive sectors are major consumers of argon gas. They demand high-quality welds for the assembly of critical components such as aircraft frames, engine parts, and vehicle chassis. Argon gas is crucial in ensuring the integrity and reliability of these components. As these industries expand, driven by advancements in technology and consumer demand for automobiles and air travel, the need for argon gas continues to rise.

The electronics and semiconductor industries require ultra-high-purity argon gas for various applications. Argon is used in semiconductor manufacturing, where precise control of contamination and an inert environment are essential. It helps create a controlled atmosphere in which delicate electronic components are produced. As consumer electronics continue to evolve and demand for advanced semiconductor technology grows, the manufacturing segment's demand for argon gas remains robust.

Regional Insights

Asia-Pacific emerged as the dominant player in the global Argon Gas market in 2022, holding the largest market share in terms of value. This achievement can be attributed to the rising demand for argon gas in the flourishing food and beverage as well as healthcare sectors within the region. According to the India Brand Equity Foundation, it's noteworthy that India's healthcare sector, in particular, stands as one of the largest industries, both in terms of revenue generation and employment opportunities.

Europe stands as one of the foremost regions in the argon gas market, and it owes its prominence in large part to the existence of pivotal manufacturing nations, notably Germany. Notably, the escalating requirement for this product in Germany's metal fabrication sector is poised to be a driving force for heightened market demand in the forthcoming years. Furthermore, the continued growth of the aviation and automotive sectors within the country is expected to lead to an increased application of metal fabrication, thereby acting as a catalyst for an upsurge in industry demand in the foreseeable future.

Key Market Players

Air Products and Chemicals, Inc.

Gulf Cyro Inc

Universal Industrial Gases, Inc.

nexAir LLC

Southern Industrial Gas

Linde Plc

Ellenbarrie Industrial Gases Ltd

Messer Group

Parker Hannifin Corp.

Yindi Gases Group

Report Scope:

In this report, the Global Argon Gas Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Argon Gas Market, By Form:

Gas

Liquid Argon Gas

Argon Gas Market, By End-User:

Healthcare

Food & Beverages

Electronics

Manufacturing

Others

Argon Gas Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Argon Gas Market.

Available Customizations:

Global Argon Gas market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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