

Cryogenic Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Valve, Tank, Vaporizer, Pump, and Others), By Cryogen Type (Nitrogen, Oxygen, Argon, Liquefied Natural Gas, and Others), By End User (Energy & Power, Chemical, Electronics, Shipping, Metallurgical, and Others), By Region, By Competition, 2019-2029F

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Abstracts

Global Cryogenic Equipment Market was valued at USD 21.08 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.19% through 2029. The cryogenic equipment market refers to the global industry involved in the design, manufacturing, and supply of specialized equipment designed to handle and manipulate materials at extremely low temperatures. This market encompasses a diverse range of products, including cryogenic storage tanks, liquefaction systems, vaporization units, and related components used in various applications such as healthcare, energy, aerospace, and industrial processes. Cryogenic equipment is essential for the storage, transportation, and processing of gases and fluids like nitrogen, oxygen, and liquefied natural gas (LNG) at temperatures below -150 degrees Celsius (-238 degrees Fahrenheit). The market is characterized by its technologically advanced products, stringent safety standards, and a complex regulatory landscape. As industries continue to evolve and demand for cryogenic applications grows, the cryogenic equipment market plays a crucial role in facilitating the efficient and safe handling of substances at extreme low temperatures across diverse sectors on a global scale.

Key Market Drivers

Increasing Demand in Healthcare and Medical Applications

The global cryogenic equipment market is experiencing a significant boost due to the rising demand in healthcare and medical applications. Cryogenic equipment, such as cryogenic storage tanks and cryogenic freezers, play a crucial role in the storage and transportation of medical gases, biological samples, and pharmaceutical products at extremely low temperatures. With the growth of the healthcare sector globally, there has been a parallel increase in the need for advanced cryogenic solutions.

Cryopreservation techniques, used in the storage of biological materials like stem cells, tissues, and organs, are becoming more prevalent. This is particularly important in the field of organ transplantation and regenerative medicine. As research and development in the healthcare industry continue to expand, the demand for cryogenic equipment is expected to rise, providing a substantial driver for the growth of the global cryogenic equipment market.

Expanding Applications in the Energy Sector

The energy sector is another major driver propelling the growth of the global cryogenic equipment market. Cryogenic technologies are widely employed in the liquefied natural gas (LNG) industry, enabling the efficient storage, transportation, and distribution of natural gas. The increasing focus on clean and sustainable energy sources has led to a surge in LNG projects globally, driving the demand for cryogenic equipment.

The use of cryogenic equipment for the production of liquid hydrogen and oxygen is gaining traction in the space exploration sector. With governments and private entities investing heavily in space exploration and satellite deployment, the demand for cryogenic equipment for rocket propulsion systems and satellite launch vehicles is on the rise. This expanding application in the energy and space sectors is a crucial driver for the global cryogenic equipment market.

Growing Industrial Gas Demand

The industrial gas industry is a significant driver for the global cryogenic equipment market. Cryogenic equipment is extensively used in the production, storage, and distribution of industrial gases such as nitrogen, oxygen, and argon. These gases find applications in diverse industries, including manufacturing, metal fabrication, chemicals,

and electronics. The increasing demand for industrial gases, driven by industrialization, is boosting the need for advanced cryogenic equipment.

The steel industry, for instance, relies heavily on oxygen produced through cryogenic processes for efficient steelmaking. Additionally, the electronics industry uses high-purity gases produced and stored with cryogenic equipment in the manufacturing of semiconductors. As various industries continue to expand and upgrade their processes, the demand for industrial gases and, consequently, cryogenic equipment is expected to grow, contributing to the overall growth of the market.

Advancements in LNG Infrastructure

The global focus on cleaner energy sources and the transition from traditional fuels to natural gas have led to significant advancements in liquefied natural gas (LNG) infrastructure. Cryogenic equipment, such as LNG storage tanks and vaporization systems, plays a critical role in the entire LNG value chain. The growing demand for LNG as a cleaner alternative to traditional fossil fuels, particularly in transportation and power generation, is driving investments in LNG infrastructure globally.

Countries are investing in expanding their LNG import and export capabilities, leading to the construction of new LNG terminals and liquefaction plants. This surge in LNG infrastructure projects is directly boosting the demand for cryogenic equipment. As the world aims to reduce greenhouse gas emissions and increase the share of natural gas in the energy mix, the demand for LNG and, subsequently, cryogenic equipment is anticipated to witness sustained growth.

Aerospace and Defense Applications

The aerospace and defense sector is emerging as a significant driver for the global cryogenic equipment market. Cryogenic technology is integral to the development and operation of space launch vehicles, satellite systems, and missile systems. Liquid oxygen and liquid hydrogen, stored and handled with cryogenic equipment, are commonly used as propellants in rockets and missiles.

As governments invest in space exploration and defense capabilities, there is a growing need for reliable and advanced cryogenic solutions. The development of space programs by both established space agencies and private aerospace companies is fueling the demand for cryogenic equipment. Additionally, the increasing geopolitical tensions are leading to investments in defense capabilities, further contributing to the

growth of the cryogenic equipment market in the aerospace and defense sector.

Research and Development in Cryogenic Technologies

The continuous research and development in cryogenic technologies are driving innovations and advancements in cryogenic equipment. Scientists and engineers are exploring new materials, design concepts, and manufacturing processes to enhance the efficiency, safety, and reliability of cryogenic systems. This focus on innovation is resulting in the development of next-generation cryogenic equipment with improved insulation properties, reduced heat leakage, and increased durability.

The ongoing R&D efforts are also expanding the range of applications for cryogenic equipment, opening up new markets and opportunities. For example, cryogenic cooling systems are gaining prominence in the electronics industry for cooling high-performance computing systems and superconducting devices. The collaboration between research institutions, industry players, and government agencies is fostering a conducive environment for technological breakthroughs, positively influencing the growth of the global cryogenic equipment market.

The global cryogenic equipment market is being propelled by a convergence of factors, including the increasing demand in healthcare, expanding applications in the energy sector, growing industrial gas demand, advancements in LNG infrastructure, aerospace and defense applications, and ongoing research and development in cryogenic technologies. These drivers collectively contribute to the market's growth and underscore the crucial role that cryogenic equipment plays across various industries and applications.

Government Policies are Likely to Propel the Market

Environmental Regulations and Emissions Standards

Governments worldwide are increasingly implementing stringent environmental regulations and emissions standards to address climate change and promote sustainable practices across industries. In the context of the global cryogenic equipment market, these policies play a pivotal role in shaping the industry's trajectory.

To combat greenhouse gas emissions, governments are imposing limits on industrial processes, including those related to cryogenic technologies. For instance, regulations may mandate the reduction of fugitive emissions from cryogenic storage tanks and

transportation systems. Additionally, there is a growing emphasis on the use of environmentally friendly refrigerants in cryogenic applications to minimize the industry's carbon footprint.

These policies not only foster environmental sustainability but also drive innovation within the cryogenic equipment market. Manufacturers are incentivized to develop and adopt technologies that enhance energy efficiency and reduce emissions, ensuring compliance with evolving regulatory standards.

Trade and Export Controls

Given the strategic importance of cryogenic technologies in various sectors, governments often implement trade and export controls to safeguard national security interests and prevent the proliferation of sensitive technologies. The global cryogenic equipment market is subject to these policies, which regulate the international trade of cryogenic products, components, and related technologies.

Governments may restrict the export of certain cryogenic equipment to countries or entities deemed to pose security risks. Export control policies aim to strike a balance between supporting the growth of the cryogenic industry and preventing the misuse of advanced technologies in ways that could compromise national security.

These policies necessitate robust compliance measures within the cryogenic equipment market, requiring manufacturers and exporters to adhere to licensing requirements and export restrictions. Companies operating in this space must navigate a complex landscape of international regulations to ensure responsible and lawful trade practices.

Research and Development Funding

Governments worldwide recognize the strategic importance of cryogenic technologies in driving innovation, supporting critical industries, and maintaining a competitive edge in the global economy. Consequently, many governments implement policies to allocate funding for research and development (R&D) initiatives within the cryogenic equipment sector.

These R&D funding policies aim to spur technological advancements, improve the efficiency of cryogenic systems, and explore new applications for cryogenic technologies. Governments may collaborate with academic institutions, research organizations, and industry partners to facilitate joint R&D projects that contribute to the

growth and evolution of the cryogenic equipment market.

By providing financial incentives for innovation, governments play a pivotal role in fostering a conducive environment for breakthroughs in cryogenic technology. This support ensures that the industry remains at the forefront of advancements, addressing emerging challenges and capitalizing on new opportunities.

Safety and Regulatory Standards

Cryogenic equipment operates under extreme conditions and involves the handling of substances at extremely low temperatures. Recognizing the potential risks associated with such processes, governments worldwide implement comprehensive safety and regulatory standards to protect workers, the public, and the environment.

These policies cover various aspects of cryogenic equipment, including the design, installation, operation, and maintenance of cryogenic systems. Standards may address the construction materials used, the integrity of storage vessels, emergency response procedures, and training requirements for personnel working with cryogenic equipment.

Governments collaborate with industry stakeholders to develop and update safety standards, ensuring that they remain relevant and effective in mitigating risks. Compliance with these standards is not only a legal requirement but also a crucial aspect of corporate responsibility for companies operating in the cryogenic equipment market.

Energy Efficiency and Conservation Measures

With a growing emphasis on energy efficiency and conservation, governments worldwide are implementing policies to incentivize the adoption of technologies that reduce energy consumption. In the context of the global cryogenic equipment market, these policies influence the design, manufacturing, and operation of cryogenic systems to minimize energy wastage.

Governments may offer financial incentives, tax credits, or subsidies for the adoption of energy-efficient cryogenic technologies. This includes measures such as improved insulation materials, advanced refrigeration systems, and optimized transportation methods for cryogenic fluids.

By promoting energy efficiency within the cryogenic equipment market, governments

aim to address broader environmental and economic goals, including the reduction of energy-related carbon emissions and the sustainable use of resources. Companies in the cryogenic sector must align their practices with these policies to benefit from incentives and contribute to the global effort to combat climate change.

Infrastructure Development and Investment

Governments recognize the critical role that cryogenic technologies play in various industries, from healthcare and energy to aerospace and manufacturing. To support the growth of the cryogenic equipment market, governments implement policies that prioritize infrastructure development and investment in key areas.

Infrastructure policies may include initiatives to expand the capacity of LNG terminals, improve the transportation networks for cryogenic fluids, and enhance the overall resilience of the cryogenic supply chain. By investing in infrastructure, governments aim to create an environment conducive to the efficient production, storage, and distribution of cryogenic products.

These policies not only benefit the cryogenic equipment market directly but also contribute to the economic development of regions involved in cryogenic activities. Governments collaborate with industry stakeholders to identify strategic infrastructure projects that align with national priorities and foster long-term sustainability in the cryogenic equipment sector.

Key Market Challenges

High Initial Capital Investment and Operational Costs

One significant challenge faced by the global cryogenic equipment market is the substantial initial capital investment required for the design, construction, and implementation of cryogenic facilities. Cryogenic systems, which operate at extremely low temperatures, demand specialized materials, advanced engineering, and stringent safety measures, all of which contribute to elevated costs. The high initial capital investment poses a barrier to entry for smaller companies and can be a significant financial burden for businesses, impacting the overall growth and accessibility of the cryogenic equipment market.

The construction of cryogenic storage tanks, liquefaction plants, and transportation infrastructure involves the use of materials designed to withstand extreme

temperatures, such as stainless steel and specialized alloys. Additionally, the insulation systems required to minimize heat leakage and maintain low temperatures add to the overall cost. Moreover, compliance with stringent safety standards and regulations necessitates additional investments in safety features and training programs for personnel.

Operational costs also pose a challenge, as cryogenic equipment requires continuous monitoring, maintenance, and skilled personnel for its efficient operation. The energy consumption of cryogenic systems, especially in liquefied natural gas (LNG) production and storage, contributes significantly to operational expenses. As energy prices fluctuate, companies in the cryogenic equipment market must navigate the challenge of optimizing operational efficiency to manage costs effectively.

To address this challenge, industry participants are exploring innovative financing models, such as public-private partnerships and leasing arrangements, to ease the burden of high upfront costs. Additionally, advancements in materials science and engineering are being pursued to develop cost-effective alternatives that maintain the performance and safety standards of traditional cryogenic equipment.

Complex Regulatory Landscape and Compliance

The global cryogenic equipment market operates within a complex regulatory landscape, with diverse standards and requirements set by different countries and regions. Compliance with these regulations poses a significant challenge for companies operating in the cryogenic sector, especially those engaged in international trade and collaboration.

Regulations cover various aspects, including safety standards, environmental considerations, and export controls. The diversity of regulatory frameworks can create confusion and increase the compliance burden for manufacturers and users of cryogenic equipment. Companies must invest considerable resources in understanding and adhering to the specific requirements of each market in which they operate, leading to complexities in global supply chains.

Safety standards for cryogenic storage and transportation may vary from country to country, requiring companies to tailor their equipment and processes to meet specific regulatory requirements. Export controls, aimed at preventing the proliferation of sensitive technologies, add an additional layer of complexity, necessitating careful navigation of international trade regulations.

The regulatory landscape is dynamic, with standards evolving over time in response to technological advancements and changing geopolitical dynamics. Staying abreast of these changes and ensuring continuous compliance can be resource-intensive and may impact the speed at which companies can bring new cryogenic products to market.

To address the challenges posed by the complex regulatory landscape, industry stakeholders advocate for international harmonization of standards to create a more uniform set of regulations. This would not only simplify compliance efforts but also foster greater collaboration and trade between countries. Companies in the cryogenic equipment market must proactively engage with regulatory bodies, industry associations, and government agencies to stay informed about changes in regulations and actively participate in shaping future standards. Additionally, investment in robust compliance management systems and training programs is essential to navigate the intricate web of global regulations effectively.

Key Market Trends

Growing Adoption of Cryogenic Equipment in Healthcare and Pharmaceuticals:

Cryogenic equipment plays a crucial role in various applications within the healthcare and pharmaceutical industries, driving a significant trend in market growth. The demand for cryogenic equipment in these sectors is propelled by its ability to store and transport biological materials, vaccines, blood products, and other sensitive medical supplies at ultra-low temperatures.

key factor contributing to the growth of cryogenic equipment in healthcare is the increasing focus on regenerative medicine and cell therapy research. These innovative medical approaches require precise cryopreservation techniques to maintain the viability of cells and tissues for therapeutic purposes. Cryogenic freezers, storage tanks, and cryopreservation systems are indispensable tools in this field, supporting the storage and transportation of biological samples at temperatures as low as -196°C (-320°F).

The pharmaceutical industry relies on cryogenic equipment for the storage and distribution of temperature-sensitive drugs and vaccines. With the global expansion of vaccination programs and the development of biopharmaceuticals, there is a growing need for cryogenic storage solutions that ensure the integrity and efficacy of these products throughout the supply chain.

Significant trend driving the adoption of cryogenic equipment in healthcare is the emergence of cryogenic medical imaging technologies. Cryogenic magnetic resonance imaging (MRI) and cryo-electron microscopy (cryo-EM) techniques offer high-resolution imaging capabilities for studying biological structures and disease mechanisms. These advanced imaging modalities require specialized cryogenic systems to maintain the samples at ultra-low temperatures during the imaging process, thereby enabling groundbreaking discoveries in medical research.

The growing emphasis on healthcare infrastructure development, coupled with the increasing demand for advanced medical treatments and diagnostic technologies, is fueling the expansion of the cryogenic equipment market in the healthcare and pharmaceutical sectors.

Segmental Insights

Product Type Insights

The Tank segment held the largest Market share in 2023. Cryogenic storage tanks are fundamental to the market because they play a central role in storing large quantities of liquefied gases at extremely low temperatures. These tanks are used to store gases such as LNG, liquid oxygen, liquid nitrogen, and argon.

The ability to store and transport cryogenic liquids is crucial for various industries, including energy (LNG), healthcare (medical gases), and manufacturing (industrial gases).

The growth of the liquefied natural gas (LNG) industry has significantly contributed to the dominance of cryogenic storage tanks. LNG is stored and transported in cryogenic tanks to maintain it in a liquid state at very low temperatures.

The increasing global demand for cleaner energy sources has driven substantial investments in LNG infrastructure, further boosting the demand for cryogenic tanks.

Cryogenic storage tanks are versatile and find applications across diverse industries. They are used in the healthcare sector for storing medical gases, in the food industry for flash freezing, and in manufacturing processes requiring the storage of various cryogenic liquids.

The versatility and adaptability of cryogenic tanks to different applications contribute to their dominance in the market.

Continuous advancements in materials, insulation technologies, and safety features of cryogenic tanks have enhanced their efficiency and reliability. These improvements have further solidified the position of cryogenic storage tanks as a dominant product in the market.

Ongoing investments in cryogenic infrastructure, including storage facilities and transportation networks, have led to a consistent demand for cryogenic storage tanks. Countries and regions expanding their LNG import/export capabilities contribute significantly to this demand.

Cryogenic storage tanks are designed and built to comply with stringent safety and regulatory standards. Their reliability in storing and handling cryogenic fluids at extremely low temperatures aligns with safety requirements, making them a preferred choice in industries where safety is paramount.

Cryogenic storage tanks are designed for long-term storage, making them suitable for applications where a consistent and reliable supply of cryogenic liquids is necessary.

Regional Insights

North America

North America held the largest market share in 2023. Primary factors propelling North America's dominance in the global cryogenic equipment market is its unrivaled technological prowess. The region boasts cutting-edge research and development facilities coupled with a highly skilled workforce dedicated to innovation in cryogenic technologies. Companies based in North America continually invest in research and development to enhance the efficiency and reliability of cryogenic equipment, thereby maintaining a competitive edge in the global market.

North America is home to a diverse range of industrial sectors, including healthcare, electronics, aerospace, and energy, all of which heavily rely on cryogenic equipment for various applications. The region's robust industrial infrastructure and high demand for cryogenic equipment contribute significantly to its dominance in the global market. Moreover, stringent safety regulations and quality standards implemented in North America ensure the production of high-quality cryogenic equipment, further solidifying

its position in the market.

key factor driving North America's dominance in the global cryogenic equipment market is the strategic partnerships and collaborations forged between industry players, research institutions, and government agencies. These collaborations facilitate knowledge exchange, technology transfer, and joint research initiatives aimed at advancing cryogenic technologies. By leveraging synergies and pooling resources, companies in North America gain a competitive advantage in terms of innovation, product development, and market penetration.

The growing demand for liquefied natural gas (LNG) as a cleaner alternative to traditional fuels is a significant driver of the cryogenic equipment market in North America. The region's abundant shale gas reserves and increasing emphasis on energy diversification have spurred investments in LNG infrastructure, including liquefaction plants, storage facilities, and transportation networks. As a result, the demand for cryogenic equipment such as LNG storage tanks, vaporizers, and regasification units has surged, further bolstering North America's dominance in the global market.

North America's dominance in the global cryogenic equipment market can be attributed to its technological prowess, thriving industrial sectors, strategic partnerships, and rising demand for LNG. As the region continues to innovate and invest in cryogenic technologies, it is poised to maintain its leadership position in the global market. However, with emerging economies in Asia-Pacific and Europe ramping up their investments in cryogenic infrastructure, North America will face increasing competition, necessitating continuous innovation and strategic alliances to sustain its competitive edge.

Key Market Players

Air Liquide S.A.

Linde Plc

Emerson Electric Co.

Chart Industries Inc.

Baker Hughes Company

IHI Corporation

Kawasaki Heavy Industries Ltd

Mitsubishi Heavy Industries Ltd

Howden Broking Group Limited

Burckhardt Compression AG

Report Scope:

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

Cryogenic Equipment Market, By Product Type:

Valve

Tank

Vaporizer

Pump

Others

Cryogenic Equipment Market, By Cryogen Type:

Nitrogen

Oxygen

Argon

Liquefied Natural Gas

Others

Cryogenic Equipment Market, By End User:

Energy & Power

Chemical

Electronics

Shipping

Metallurgical

Others

Cryogenic Equipment 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

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cryogenic Equipment Market.

Available Customizations:

Global Cryogenic Equipment 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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