

Welding Gas/ Shielding Gas Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Argon, Carbon Dioxide and Others), By Application (Gas Metal Arc Welding, Tungsten Gas Arc Welding and Others), By Storage (Cylinder & Packaged Gas Distribution and Merchant Liquid/Bulk Distribution), By End User (Construction, Energy, Aerospace, Metal Manufacturing & Fabrication and Others), By Region, and By Competition 2018-2028

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Abstracts

Global Welding Gas/ Shielding Gas Market has valued at USD 3.88 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.29% through 2028. Infrastructure development projects, including the construction of roads, bridges, airports, and buildings, require welding processes for structural fabrication. Shielding gases play a crucial role in ensuring the integrity of welds in these critical applications. The global push for infrastructure development, particularly in emerging economies, contributes significantly to the growing demand for welding gases.

Key Market Drivers

Growing Demand for Welded Products in Various Industries

The global welding gas/shielding gas market is experiencing a significant boost due to the increasing demand for welded products across diverse industries. Welding is a

fundamental process in the manufacturing sector, playing a crucial role in the fabrication of products ranging from automobiles to construction materials. As industrialization continues to expand globally, there is a parallel surge in the demand for welding gases.

One key driver of this demand is the thriving automotive industry. Automotive manufacturing relies heavily on welding processes for the assembly of components, body structures, and other vital parts. With the rise in consumer purchasing power and the global trend toward electric vehicles, the automotive industry is undergoing rapid transformations, driving the need for advanced welding technologies and, consequently, welding gases.

Similarly, the construction industry is another major contributor to the growing demand for welding gases. As urbanization and infrastructure development projects proliferate worldwide, the construction sector is witnessing increased adoption of welding processes for the fabrication of steel structures and other critical components. Welding gases, particularly shielding gases, play a crucial role in ensuring the quality and strength of welded joints in these applications.

Technological Advancements and Innovation in Welding Processes

The welding industry is experiencing a paradigm shift with continuous technological advancements and innovations in welding processes. This is a significant driver for the global welding gas/shielding gas market as new and improved welding techniques often require specialized gases to enhance efficiency, precision, and safety.

One notable advancement is the increasing use of advanced welding processes such as laser welding and electron beam welding. These processes offer advantages such as higher welding speeds, reduced heat-affected zones, and improved weld quality. However, they often necessitate the use of specific shielding gases tailored to the requirements of these high-tech welding methods. As industries increasingly adopt these cutting-edge welding technologies, the demand for corresponding shielding gases is set to rise.

Moreover, innovations in gas mixtures are contributing to enhanced welding outcomes. Customized gas blends are designed to meet the specific needs of different materials and welding processes, optimizing weld penetration, minimizing spatter, and improving overall weld quality. This focus on precision and efficiency is propelling the welding gas market forward.

Growing Infrastructure Development in Emerging Economies

The welding gas/shielding gas market is experiencing robust growth due to the increasing infrastructure development activities in emerging economies. Countries in Asia, Africa, and South America are witnessing significant investments in infrastructure projects, including the construction of roads, bridges, airports, and industrial facilities.

Rapid urbanization and population growth in these regions are driving the need for expanded infrastructure, boosting the demand for welding gases. In construction projects, welding is integral for joining steel and other metal components, and shielding gases are essential to ensure the integrity of the welds. The growth of the construction sector in emerging economies, coupled with industrialization initiatives, is a key driver for the welding gas market.

Additionally, the expansion of manufacturing activities in these regions further fuels the demand for welding gases. As these economies become increasingly industrialized, the usage of welding processes in manufacturing applications rises, leading to a parallel increase in the consumption of welding gases.

In conclusion, the growing demand for welded products in various industries, technological advancements in welding processes, and the surge in infrastructure development in emerging economies are three significant drivers propelling the global welding gas/shielding gas market forward. These factors collectively indicate a positive trajectory for the industry as it continues to play a vital role in the world of manufacturing and construction.

Key Market Challenges

Fluctuating Prices of Raw Materials and Supply Chain Disruptions

One of the major challenges facing the global welding gas/shielding gas market is the volatility in the prices of raw materials and the susceptibility of the supply chain to disruptions. The production of welding gases relies heavily on raw materials such as atmospheric gases (oxygen, nitrogen, and argon) and hydrocarbons. The prices of these raw materials are subject to various factors, including geopolitical tensions, natural disasters, and fluctuations in global energy markets.

Geopolitical events, such as trade tensions or regional conflicts, can disrupt the supply

of raw materials, leading to sudden and unpredictable price spikes. Additionally, natural disasters, such as hurricanes or earthquakes, can impact the production and transportation of these materials. The interconnected and global nature of the supply chain for welding gases makes it vulnerable to disruptions, affecting the availability and affordability of these gases for end-users.

In recent years, the COVID-19 pandemic has further highlighted the vulnerability of supply chains. Lockdowns, restrictions on movement, and disruptions in logistics have led to delays in the production and delivery of welding gases. Such uncertainties in the supply chain pose a considerable challenge for market players who must navigate these challenges to maintain a stable and cost-effective supply of welding gases.

Stringent Regulatory Standards and Environmental Concerns

The welding gas/shielding gas industry is subject to stringent regulatory standards and increasing environmental concerns, presenting a challenge for market participants. Governments worldwide are imposing stricter regulations to ensure workplace safety, control emissions, and reduce the environmental impact of industrial activities. Compliance with these regulations requires continuous investment in research and development to develop environmentally friendly gas formulations and processes.

One significant regulatory concern is the emission of greenhouse gases (GHGs) during the production and use of welding gases. For example, the manufacturing of nitrous oxide (N₂O), a byproduct in the production of nitric acid, is associated with environmental concerns due to its contribution to global warming. Market players need to invest in technologies that minimize these emissions or develop alternative gas formulations that have a lower environmental impact.

Additionally, workplace safety standards are evolving, demanding better control measures to protect workers from exposure to hazardous welding fumes and gases. This necessitates continuous innovation in gas formulations and welding techniques to reduce the generation of harmful byproducts and enhance workplace safety.

Intense Market Competition and Technological Disruption

The global welding gas/shielding gas market is characterized by intense competition among key players, and the industry is susceptible to technological disruptions. Established companies and new entrants alike are constantly innovating to gain a competitive edge, leading to a dynamic market landscape.

Technological disruptions, such as the development of alternative welding methods or the introduction of novel gas formulations, can quickly alter market dynamics. Established players may face challenges in adapting to these changes, and new entrants with innovative solutions can disrupt traditional market hierarchies. This creates a constant need for companies to invest in research and development to stay ahead of technological advancements and maintain their market positions.

Moreover, price competition is a persistent challenge in the industry. With numerous suppliers offering similar products, price becomes a significant factor influencing purchasing decisions. This pressure on pricing can impact profit margins and hinder the ability of companies to invest in research and development or maintain high-quality standards.

In conclusion, the fluctuating prices of raw materials and supply chain disruptions, stringent regulatory standards and environmental concerns, and intense market competition with technological disruptions are three key challenges facing the global welding gas/shielding gas market. Successfully navigating these challenges requires strategic planning, continuous innovation, and a commitment to sustainability and compliance.

Key Market Trends

Adoption of Advanced Gas Mixtures for Enhanced Welding Performance

An emerging and influential trend in the global welding gas/shielding gas market is the widespread adoption of advanced gas mixtures tailored to optimize welding performance. Traditional shielding gases, such as argon and carbon dioxide, have long been staples in welding processes, providing inert atmospheres essential for preventing oxidation and ensuring high-quality welds. However, the demand for improved efficiency, higher productivity, and enhanced weld quality has led to the development and adoption of more sophisticated gas blends.

Customized gas mixtures, often including a combination of argon, helium, carbon dioxide, and other specialty gases, are designed to meet the specific requirements of different welding applications and materials. These advanced gas formulations offer advantages such as improved arc stability, reduced spatter, enhanced penetration, and better control over the welding process. As a result, industries such as automotive, aerospace, and heavy machinery manufacturing are increasingly incorporating these

advanced gas mixtures into their welding operations to achieve superior results.

The trend towards advanced gas mixtures is also fueled by the demand for greater precision in welding processes. For instance, in industries where weld quality is critical, such as aerospace and nuclear power, the use of precise gas compositions is essential for achieving the desired mechanical and metallurgical properties in the welded joints. This trend is likely to persist as manufacturers seek ways to optimize their welding processes and stay competitive in a rapidly evolving industrial landscape.

Rising Focus on Sustainability and Green Initiatives in Gas Production

A significant and transformative trend in the global welding gas/shielding gas market is the increasing emphasis on sustainability and green initiatives in gas production. With a growing awareness of environmental issues and the carbon footprint associated with industrial activities, stakeholders in the welding gas industry are actively exploring ways to reduce the environmental impact of gas manufacturing processes.

One notable aspect of this trend is the development and adoption of more sustainable gas production methods. For example, advancements in gas separation technologies, such as pressure swing adsorption (PSA) and membrane separation, allow for more energy-efficient and environmentally friendly production of gases like nitrogen and oxygen. These technologies enable the recovery and reuse of gases, minimizing waste and reducing overall energy consumption.

Furthermore, there is a push towards developing alternative gas formulations that have lower greenhouse gas emissions during their production and use. Companies in the welding gas industry are investing in research and development to formulate gases that meet industry standards while minimizing their environmental impact. This aligns with the broader global movement towards eco-friendly practices and corporate responsibility.

As sustainability becomes a key consideration for businesses and consumers alike, the welding gas industry is likely to witness a shift towards greener practices and products. This trend is not only driven by regulatory pressures but also by a genuine commitment to environmental stewardship, reflecting the industry's recognition of its role in contributing to a more sustainable future. Companies that proactively embrace and promote sustainable practices are expected to gain a competitive advantage in the evolving market landscape.

Segmental Insights

Type Insights

The Carbon Dioxide segment emerged as the dominating segment in 2022. Carbon dioxide (CO₂) is a significant component in the welding gas/shielding gas market, playing a crucial role in various welding processes. It is commonly used as a shielding gas in metal inert gas (MIG) and metal active gas (MAG) welding applications. The unique properties of carbon dioxide, including its affordability and effectiveness in certain welding scenarios, contribute to its widespread adoption in the industry.

Carbon dioxide is extensively used as a shielding gas in MIG welding, where it serves the dual purpose of protecting the weld pool from atmospheric contamination and facilitating the arc stability. The affordability of CO₂ makes it a preferred choice in applications such as automotive manufacturing, general fabrication, and construction, where cost-effectiveness is a critical consideration.

The primary driver for the use of carbon dioxide in welding applications is its cost-effectiveness. As compared to some other shielding gases, CO₂ is relatively more affordable, making it an attractive choice for industries where cost considerations are paramount. This affordability is particularly advantageous in high-volume manufacturing processes, such as automotive production lines.

The cost-effectiveness of carbon dioxide makes it a compelling choice for manufacturers in developing economies. As industrialization and infrastructure development continue to rise in these regions, the demand for welding gases, including carbon dioxide, is expected to grow.

End User Insights

The Construction segment is projected to experience rapid growth during the forecast period. The construction industry is a significant consumer of welding gases, with applications ranging from the fabrication of structural components to the assembly of infrastructure elements. Welding processes play a crucial role in joining metals and ensuring the structural integrity of buildings, bridges, and other construction projects. Shielding gases, including a variety of gas mixtures, are utilized to protect the weld pool from atmospheric contamination, ensuring high-quality and durable welds.

Welding gases are extensively used in the fabrication of structural steel components, a

fundamental element in construction. Gas metal arc welding (GMAW) processes, such as metal inert gas (MIG) and metal active gas (MAG) welding, are commonly employed. Shielding gases, often a mixture of argon and carbon dioxide, contribute to the stability of the welding arc and the quality of the welds. Gas pipelines, a crucial component of energy infrastructure, often involve welding processes for joining sections of pipes. Shielding gases are employed to prevent oxidation and ensure the integrity of the welds. In this application, gas blends may be customized to meet specific requirements, considering factors such as pipeline material and environmental conditions.

The global focus on infrastructural development, including the construction of roads, bridges, airports, and utilities, is a significant driver for the welding gas market in the construction segment. As countries invest in expanding and modernizing their infrastructure, the demand for welding gases to support construction activities increases.

The construction industry is witnessing the adoption of advanced welding technologies, including robotic welding systems and automation. The integration of these technologies may drive the demand for precise and specialized shielding gases that complement the requirements of modern welding processes.

Regional Insights

Asia Pacific emerged as the dominating region in 2022, holding the largest market share. The Asia Pacific region is a dynamic and rapidly growing market for welding gases, driven by robust industrialization, infrastructure development, and manufacturing activities. The demand for welding gases, including shielding gases, is influenced by the expanding construction, automotive, and manufacturing sectors across countries in the Asia Pacific region.

Many countries in the Asia Pacific region are undertaking extensive infrastructure development projects to support urbanization and economic growth. Large-scale construction activities, including the building of roads, bridges, and commercial structures, require welding gases for various applications such as structural steel fabrication. The construction boom contributes significantly to the demand for shielding gases in the region.

The Asia Pacific region is home to some of the world's largest and fastest-growing automotive markets. The expansion of the automotive industry, driven by increasing consumer demand and the rise of electric vehicles, fuels the need for welding gases in

manufacturing processes. Welding gases play a crucial role in joining and fabricating components in the automotive sector.

The Asia Pacific region is witnessing a shift towards advanced welding technologies, including robotic welding systems and automation. This trend is driven by the need for increased efficiency, precision, and productivity in manufacturing. As industries adopt these advanced technologies, there is a corresponding demand for specialized shielding gases that complement these modern welding processes.

Growing environmental awareness is prompting industries in the Asia Pacific region to focus on sustainable practices. This includes a consideration for environmentally friendly welding gases and processes. Suppliers that offer eco-friendly gas formulations may gain a competitive advantage as businesses increasingly prioritize sustainability in their operations.

The Asia Pacific region is expected to continue its robust growth in the welding gas market, driven by ongoing industrialization, infrastructure development, and advancements in manufacturing technologies. The adoption of innovative welding processes and a focus on sustainability are likely to shape the future trajectory of the welding gas market in this dynamic and diverse region. Companies that can navigate regulatory complexities, offer cost-effective solutions, and align with emerging trends are poised for success in the Asia Pacific welding gas market.

Key Market Players

Air Products & Chemicals, Inc.

The Linde Group

Messer Group GmbH

Iwatani Corporation

Praxair, Inc.

Iceblick Ltd.

Gulf Cryo

Taiyo Nippon Sanso Corporation

SIG Gases Berhad

Air Liquide SA

Report Scope:

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

Welding Gas/ Shielding Gas Market, By Type:

Argon

Carbon Dioxide

Others

Welding Gas/ Shielding Gas Market, By Application:

Gas Metal Arc Welding

Tungsten Gas Arc Welding

Others

Welding Gas/ Shielding Gas Market, By Storage:

Cylinder & Packaged Gas Distribution

Merchant Liquid/Bulk Distribution

Welding Gas/ Shielding Gas Market, By End User:

Construction

Energy

Aerospace

Metal Manufacturing & Fabrication

Others

Welding Gas/ Shielding Gas Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Netherlands

Belgium

*Asia-Pacific

China

India

Japan

Australia

South Korea

Thailand

Malaysia

South America

Brazil

Argentina

Colombia

Chile

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Welding Gas/ Shielding Gas Market.

Available Customizations:

Global Welding Gas/ Shielding Gas Market report with the given market data, Tech Sci

Welding Gas/ Shielding Gas Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented B...

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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