

# Asia Pacific Cryogenic Pumps Market Size and Forecast (2021 - 2031)

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## Abstracts

The Asia Pacific Cryogenic Pumps Market is projected to grow significantly, reaching an estimated US\$ 1,470.6 million by 2031, up from US\$ 959.8 million in 2024, with a compound annual growth rate (CAGR) of 6.3% anticipated from 2025 to 2031.

## Executive Summary and Market Analysis

The semiconductor materials market, valued at US\$ 64 billion, encompasses chemicals and materials utilized in both the frontend (US\$ 40 billion) and back-end (ATP) (US\$ 24 billion) segments of the supply chain. Within the frontend materials segment, silicon wafers and photoresist account for approximately US\$ 19.5 billion, which is about half of the total market. Other critical subcategories, including gases, wet chemicals, CMP slurries, and sputtering targets, are vital for various fabrication processes.

The back-end ATP market, valued at US\$ 95 billion, is predominantly located in Northeast Asia, particularly in South Korea, Mainland China, and Taiwan, which collectively hold around 60% of global ATP capacity. Since 2023, of the 36 ATP facilities announced, 25 are expected to be established in Mainland China and Taiwan, driven by lower construction and labor costs.

Taiwan and South Korea are crucial players in semiconductor manufacturing, with Taiwan dominating over 70% of advanced node chip manufacturing (less than 10 nanometers) through TSMC's advanced foundry operations. South Korea has also made significant investments in its semiconductor sector, with companies like Samsung and SK Hynix leading the global markets for NAND flash memory and DRAM chips, respectively.

## Strategic Insights

### Market Segmentation Analysis

**By Type:** The market is divided into Centrifugal and Positive Displacement pumps, with Centrifugal pumps holding the largest market share in 2024.

**By Design Type:** The market is categorized into Submersible and Non-Submersible pumps, with Submersible pumps leading in market share in 2024.

**By Cryogen:** The market includes Nitrogen, Argon, Oxygen, LNG, Hydrogen, Helium, and Others, with LNG dominating the market in 2024.

**By Industry Vertical:** The market is segmented into Electronics and Semiconductor, Healthcare and Pharmaceutical, Energy and Power, Metallurgy, Aerospace, Chemical, and Others, with Energy and Power holding the largest share in 2024.

### Market Outlook

The increasing applications in the energy sector present substantial opportunities for the cryogenic pump market. As the demand for cleaner energy sources such as liquefied natural gas (LNG) and hydrogen rises, the need for efficient cryogenic pumps capable of handling ultra-low temperature fluids becomes more critical. These pumps are essential for processes like gas liquefaction, storage, and transportation, ensuring safety and reliability. The expansion of renewable energy and gas infrastructure projects further enhances market potential. The global energy demand is rapidly increasing due to industrialization and urbanization.

According to the International Energy Agency, global energy demand rose by 2.2% in 2024 compared to 2023, outpacing the average growth rate of the past decade. Between 2024 and 2030, renewable energy generation capacity is expected to increase by 5,500 gigawatts (GW), three times the growth seen from 2017 to 2023. This surge in energy demand is prompting governments and energy companies worldwide to invest in research and development for innovative energy generation and storage systems, including Cryogenic Energy Storage. This technology utilizes extremely low temperatures to store and release energy efficiently, making cryogenic pumps vital for these systems.

In November 2024, researchers at Dongguk University in South Korea developed a standalone liquid air energy storage (LAES) system that significantly improves energy efficiency and economic performance. The growing demand for cleaner and more efficient energy storage solutions is driving substantial growth opportunities for the cryogenic pump market. Innovations in cryogenic energy storage technologies are enhancing energy efficiency and reliability, further promoting market adoption. Increased investments in R&D are accelerating advancements in pump performance and application scope, indicating that the expanding energy sector will sustain demand for advanced cryogenic pumping systems globally.

## Country Insights

The Asia Pacific Cryogenic Pumps Market is segmented by country into Australia, China, India, Japan, South Korea, and the Rest of APAC, with China holding the largest market share in 2024.

In 2023, global investment in hydrogen supply projects under construction reached US\$ 3.5 billion, with approximately 80% allocated to electrolysis facilities and the remainder to projects integrating hydrogen production with carbon capture, utilization, and storage (CCUS). A significant portion of this investment (~50%) occurred in China, which leads the world in annual investment due to the scale and number of its projects, allowing for lower unit costs. If all Chinese projects that have achieved a final investment decision (FID) proceed as planned, spending is expected to increase by 140% in 2024.

China's rapid expansion in hydrogen and chemical production capabilities is driving significant demand for cryogenic technologies, including cryogenic pumps, which are essential for the efficient storage and transportation of liquefied gases. As the country continues to enhance its hydrogen production alongside petrochemical capacity, the need for advanced cryogenic systems is anticipated to grow. The intersection of increased hydrogen investments and chemical production underscores the critical role of cryogenic technology in supporting China's ambitions in both sectors.

## Company Profiles

Key players in the Asia Pacific Cryogenic Pumps Market include Sulzer Ltd, Nikkiso Co Ltd, Fives SAS, Cryostar SAS, Ebara Elliott Energy, Trillium US Inc., SHI Cryogenics Group, CRYOGENIC MACHINERY CORP, Ruhrpumpen, Inc., Vanzetti Engineering S.p.A., PHPK Technologies, Technex Limited, Barber-Nichols, Inc., HSR AG, and

GemmeCotti Srl. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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