

Europe Cryogenic Pumps Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe Cryogenic Pumps Market is projected to grow from US\$ 420.9 million in 2024 to US\$ 602.4 million by 2031, reflecting a compound annual growth rate (CAGR) of 5.3% from 2025 to 2031.

Executive Summary and Market Analysis

The European Chips Act aims to bolster Europe's competitiveness and resilience in semiconductor technologies, with over US\$ 71.40 billion in policy-driven investments planned through 2030, complemented by long-term private investments. A significant milestone was reached on December 11, 2023, when the Commerce Department awarded US\$ 35 million to BAE Systems in the UK to enhance its manufacturing capacity for specialized devices used in advanced defense systems.

In response to the energy crisis, Europe has made significant progress in securing and diversifying its gas supply, with liquefied natural gas (LNG) playing a pivotal role. Since early 2022, the EU's LNG import capacity has increased by 31%, establishing the EU as the leading global LNG import market. In 2023, EU Member States imported 134 billion cubic meters (bcm) of LNG, which constituted 42% of total EU gas imports, with France being the largest importer at 30 bcm.

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, where Submersible pumps lead in market share for 2024.

By Cryogen: The segments include 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 growth of the global cryogenic pump market is being driven by rapid industrial investments across various sectors. Industries such as energy production, chemicals, and LNG are increasingly relying on advanced cryogenic pumps to handle ultra-low temperature fluids safely and efficiently. The ongoing infrastructure development and the adoption of innovative technologies are further intensifying this demand. Additionally, the shift towards cleaner energy sources and gas processing is prompting industries to upgrade their cryogenic systems. As a result, these dynamic industrial investments are reshaping and accelerating the cryogenic pump market globally.

For instance, in April 2025, the Spanish government announced an investment of approximately US\$ 226.3 million across three projects as part of a broader US\$ 1.5 billion initiative aimed at enhancing Spain's domestic manufacturing capabilities. Similarly, in May 2024, Italy committed around US\$ 11 billion to bolster its semiconductor production industry. Such industrial investments are crucial in propelling the global cryogenic pump market forward, as industries modernize and prioritize efficiency, leading to a rising demand for advanced cryogenic technologies.

Country Insights

The Europe Cryogenic Pumps Market is analyzed by country, including Germany, France, Italy, the United Kingdom, Russia, and the Rest of Europe, with Germany holding the largest market share in 2024.

In 2024, Germany's natural gas consumption reached 844 TWh, a 3.5% increase from

811.5 TWh in 2023, primarily driven by industrial customers who accounted for 61% of the total consumption. Despite this growth, Germany's gas imports fell to 865 TWh in 2024 from 968 TWh the previous year, with Norway, the Netherlands, and Belgium being the largest suppliers. Notably, 69 TWh of natural gas was imported through German LNG terminals, representing 8% of total imports.

Company Profiles

Key players in the Europe 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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