

Liquid Nitrogen Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Manufacturing Method (Cryogenic Distillation and Pressure Swing Adsorption), End-Use Industry (Aerospace & Defense, Automotive, Chemical, Food & Beverages, Metal Fabrication, Pharmaceutical, Electronics & Semiconductors, and Others), and Geography

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Abstracts

The liquid nitrogen market size is expected to grow from US\$ 18.83 billion in 2023 to US\$ 28.87 billion by 2031; it is estimated to register a CAGR of 5.5% from 2023 to 2031.

Liquid nitrogen (LN₂) is a cryogenic liquid, inert, noncorrosive, colorless, odorless, nonflammable, and extremely cold. Although used more commonly in the gaseous state, nitrogen is stored and transported as a liquid, making it a more cost-effective way of providing product supply. Liquid nitrogen is widely used in a multitude of commercial and technical applications. It finds application in food freezing, plastic and rubber deflashing and grinding, cooling, metal treating, biological sample preservation, pulverization, and other temperature-related applications. The growing metal fabrication industry is a significant driver of the liquid nitrogen market. Metals such as iron, steel, copper, and aluminum are often heat-treated to improve their physical properties.

Based on the manufacturing method, the global liquid nitrogen market is segmented into cryogenic distillation and pressure swing adsorption. The cryogenic distillation segment

held the largest share of the global liquid nitrogen market in 2023. The principle of the cryogenic distillation method is based on a cryogenic distillation of liquefied air. In this method, the air separation unit is filled with atmospheric air. Then, it is compressed in the air compressor, and after being compressed, the air is sent into the cleanup system—where impurities, including moisture, hydrocarbons, and carbon dioxide, are removed. Furthermore, the air is passed through heat exchangers where it is cooled to cryogenic temperatures. At this stage, nitrogen is directed into the high-pressure distillation column where it is physically separated from other different gases and is formed at the top of the column. Finally, nitrogen is removed from the column and moved to the low-pressure column, where it is distilled till it meets the commercial specifications for purity. The cryogenic distillation method is considered efficient and it is instrumental in generating high-purity nitrogen.

In 2023, Asia Pacific held the largest revenue share of the global liquid nitrogen market. Asia Pacific is experiencing substantial growth in the metal fabrication industry. According to the World Steel Association AISBL, the region produced 1,367.2 metric tons of steel as of 2023. This growing steel production in the region boosts the demand for liquid nitrogen. The liquid nitrogen market in Australia is driven by the growing automotive industry owing to the rising need for electric vehicles (EVs) among consumers. As per the Electric Vehicle Council of Australia Limited, purchases of EVs in the country doubled in 2023 compared to 2022. The number of EVs in the country as of 2023 accounted for over 180,000. Favorable government initiatives and policies, such as achieving net zero carbon emissions boost the usage of EVs in Australia.

A few of the key players in the liquid nitrogen market include Linde Plc, L'Air Liquide SA, Air Products and Chemicals Inc, SOL SpA, Praxair Technology Inc, Nippon Sanso Holdings Corp, Ube Corporation, AIR WATER INC, Gulf Cryo LLC, Osaka Gas Co Ltd, Tokyo Gas Chemicals Co Ltd, Messer SE & Co KGaA, nexAir LLC, ADNOC Gas, and Matheson Tri-Gas Inc. Players operating in the global market focus on providing high-quality products to fulfill customer demand. Also, they focus on adopting various strategies such as new product launches, capacity expansions, partnerships, and collaborations in order to stay competitive in the market. The liquid nitrogen market forecast can help stakeholders plan their growth strategies. In May 2024, Linde announced that it had signed a long-term agreement with H2 Green Steel for the supply of industrial gases to the world's first large-scale green steel production plant.

The overall global liquid nitrogen market size has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and

quantitative information related to the market. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights into the topic. The participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers—along with external consultants such as valuation experts, research analysts, and key opinion leaders—specializing in the liquid nitrogen market.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macro-economic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country level data:

4. LIQUID NITROGEN MARKET LANDSCAPE

- 4.1 Overview
- 4.2 Porters Analysis
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Intensity of Competitive Rivalry
 - 4.2.5 Threat of Substitutes
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors/Suppliers
 - 4.3.4 End Use
 - 4.3.5 List of Vendors in the Value Chain

5. LIQUID NITROGEN MARKET – KEY MARKET DYNAMICS

5.1 Liquid Nitrogen Market – Key Market Dynamics

5.2 Market Drivers

5.2.1 Increasing Use of Liquid Nitrogen in Pharmaceutical Industry

5.2.2 Rising Demand for Liquid Nitrogen in Food & Beverages Industry

5.3 Market Restraints

5.3.1 Stringent Regulatory Framework

5.4 Market Opportunities

5.4.1 Growing Number of Applications in Chemical Industry

5.5 Future Trends

5.5.1 Development of Sustainable and Lab-Friendly Liquid Nitrogen

5.6 Impact of Drivers and Restraints:

6. LIQUID NITROGEN MARKET – GLOBAL MARKET ANALYSIS

6.1 Liquid Nitrogen Market Volume (Kilo Tons), 2021–2031

6.2 Liquid Nitrogen Market Volume Forecast and Analysis (Kilo Tons)

6.3 Liquid Nitrogen Market Revenue (US\$ Million), 2023–2031

6.4 Liquid Nitrogen Market Forecast and Analysis

7. LIQUID NITROGEN MARKET REVENUE ANALYSIS – BY MANUFACTURING METHOD

7.1 Cryogenic Distillation

7.1.1 Overview

7.1.2 Cryogenic Distillation: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

7.2 Pressure Swing Adsorption

7.2.1 Overview

7.2.2 Pressure Swing Adsorption: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8. LIQUID NITROGEN MARKET VOLUME AND REVENUE ANALYSIS – BY END-USE INDUSTRY

8.1 Aerospace and Defense

8.1.1 Overview

8.1.2 Aerospace and Defense: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.1.3 Aerospace and Defense: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.2 Automotive

8.2.1 Overview

8.2.2 Automotive: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.2.3 Automotive: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.3 Chemical

8.3.1 Overview

8.3.2 Chemical: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.3.3 Chemical: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.4 Food and Beverage

8.4.1 Overview

8.4.2 Food and Beverage: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.4.3 Food and Beverage: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.5 Metal Fabrication

8.5.1 Overview

8.5.2 Metal Fabrication: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.5.3 Metal Fabrication: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.6 Pharmaceutical

8.6.1 Overview

8.6.2 Pharmaceutical: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.6.3 Pharmaceutical: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.7 Electronics and Semiconductors

8.7.1 Overview

8.7.2 Electronics and Semiconductors: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.7.3 Electronics and Semiconductors: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

8.8 Others

8.8.1 Overview

8.8.2 Others: Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

8.8.3 Others: Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9. LIQUID NITROGEN MARKET – GEOGRAPHICAL ANALYSIS

9.1 Overview

9.2 North America

9.2.1 North America Liquid Nitrogen Market Overview

9.2.2 North America Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

9.2.3 North America Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.2.4 North America Liquid Nitrogen Market Breakdown by Manufacturing Method

9.2.4.1 North America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Manufacturing Method

9.2.5 North America Liquid Nitrogen Market Breakdown by End-use Industry

9.2.5.1 North America Liquid Nitrogen Market Volume and Forecast and Analysis – by End-use Industry

9.2.5.2 North America Liquid Nitrogen Market Revenue and Forecast and Analysis – by End-use Industry

9.2.6 North America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.2.6.1 North America Liquid Nitrogen Market Volume and Forecast and Analysis – by Country

9.2.6.2 North America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.2.6.3 United States Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.2.6.3.1 United States Liquid Nitrogen Market Breakdown by Manufacturing Method

9.2.6.3.2 United States Liquid Nitrogen Market Breakdown by End-use Industry

9.2.6.4 Canada Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.2.6.4.1 Canada Liquid Nitrogen Market Breakdown by Manufacturing Method

9.2.6.4.2 Canada Liquid Nitrogen Market Breakdown by End-use Industry

9.2.6.5 Mexico Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.2.6.5.1 Mexico Liquid Nitrogen Market Breakdown by Manufacturing Method

9.2.6.5.2 Mexico Liquid Nitrogen Market Breakdown by End-use Industry

9.3 Europe

9.3.1 Europe Liquid Nitrogen Market Overview

9.3.2 Europe Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

9.3.3 Europe Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.4 Europe Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.4.1 Europe Liquid Nitrogen Market Revenue and Forecast and Analysis – by Manufacturing Method

9.3.5 Europe Liquid Nitrogen Market Breakdown by End-use Industry

9.3.5.1 Europe Liquid Nitrogen Market Volume and Forecast and Analysis – by End-use Industry

9.3.5.2 Europe Liquid Nitrogen Market Revenue and Forecast and Analysis – by End-use Industry

9.3.6 Europe Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.3.6.1 Europe Liquid Nitrogen Market Volume and Forecast and Analysis – by Country

9.3.6.2 Europe Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.3.6.3 Germany Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.3.1 Germany Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.3.2 Germany Liquid Nitrogen Market Breakdown by End-use Industry

9.3.6.4 France Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.4.1 France Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.4.2 France Liquid Nitrogen Market Breakdown by End-use Industry

9.3.6.5 Italy Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.5.1 Italy Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.5.2 Italy Liquid Nitrogen Market Breakdown by End-use Industry

9.3.6.6 United Kingdom Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.6.1 United Kingdom Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.6.2 United Kingdom Liquid Nitrogen Market Breakdown by End-use Industry

9.3.6.7 Russia Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.7.1 Russia Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.7.2 Russia Liquid Nitrogen Market Breakdown by End-use Industry

9.3.6.8 Rest of Europe Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.3.6.8.1 Rest of Europe Liquid Nitrogen Market Breakdown by Manufacturing Method

9.3.6.8.2 Rest of Europe Liquid Nitrogen Market Breakdown by End-use Industry

9.4 Asia Pacific

9.4.1 Asia Pacific Liquid Nitrogen Market Overview

9.4.2 Asia Pacific Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

9.4.3 Asia Pacific Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.4 Asia Pacific Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.4.1 Asia Pacific Liquid Nitrogen Market Revenue and Forecast and Analysis – by Manufacturing Method

9.4.5 Asia Pacific Liquid Nitrogen Market Breakdown by End-use Industry

9.4.5.1 Asia Pacific Liquid Nitrogen Market Volume and Forecast and Analysis – by End-use Industry

9.4.5.2 Asia Pacific Liquid Nitrogen Market Revenue and Forecast and Analysis – by End-use Industry

9.4.6 Asia Pacific Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.4.6.1 Asia Pacific Liquid Nitrogen Market Volume and Forecast and Analysis – by Country

9.4.6.2 Asia Pacific Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.4.6.3 Australia Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.3.1 Australia Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.3.2 Australia Liquid Nitrogen Market Breakdown by End-use Industry

9.4.6.4 China Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.4.1 China Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.4.2 China Liquid Nitrogen Market Breakdown by End-use Industry

9.4.6.5 India Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.5.1 India Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.5.2 India Liquid Nitrogen Market Breakdown by End-use Industry

9.4.6.6 Japan Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.6.1 Japan Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.6.2 Japan Liquid Nitrogen Market Breakdown by End-use Industry

9.4.6.7 South Korea Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.7.1 South Korea Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.7.2 South Korea Liquid Nitrogen Market Breakdown by End-use Industry

9.4.6.8 Rest of APAC Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.4.6.8.1 Rest of APAC Liquid Nitrogen Market Breakdown by Manufacturing Method

9.4.6.8.2 Rest of APAC Liquid Nitrogen Market Breakdown by End-use Industry

9.5 Middle East and Africa

9.5.1 Middle East and Africa Liquid Nitrogen Market Overview

9.5.2 Middle East and Africa Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

9.5.3 Middle East and Africa Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.5.4 Middle East and Africa Liquid Nitrogen Market Breakdown by Manufacturing Method

9.5.4.1 Middle East and Africa Liquid Nitrogen Market Revenue and Forecast and Analysis – by Manufacturing Method

9.5.5 Middle East and Africa Liquid Nitrogen Market Breakdown by End-use Industry

9.5.5.1 Middle East and Africa Liquid Nitrogen Market Volume and Forecast and Analysis – by End-use Industry

9.5.5.2 Middle East and Africa Liquid Nitrogen Market Revenue and Forecast and Analysis – by End-use Industry

9.5.6 Middle East and Africa Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.5.6.1 Middle East and Africa Liquid Nitrogen Market Volume and Forecast and Analysis – by Country

9.5.6.2 Middle East and Africa Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.5.6.3 South Africa Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.5.6.3.1 South Africa Liquid Nitrogen Market Breakdown by Manufacturing Method

9.5.6.3.2 South Africa Liquid Nitrogen Market Breakdown by End-use Industry

9.5.6.4 Saudi Arabia Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.5.6.4.1 Saudi Arabia Liquid Nitrogen Market Breakdown by Manufacturing Method

9.5.6.4.2 Saudi Arabia Liquid Nitrogen Market Breakdown by End-use Industry

9.5.6.5 United Arab Emirates Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.5.6.5.1 United Arab Emirates Liquid Nitrogen Market Breakdown by Manufacturing Method

9.5.6.5.2 United Arab Emirates Liquid Nitrogen Market Breakdown by End-use Industry

9.5.6.6 Rest of Middle East and Africa Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.5.6.6.1 Rest of Middle East and Africa Liquid Nitrogen Market Breakdown by Manufacturing Method

9.5.6.6.2 Rest of Middle East and Africa Liquid Nitrogen Market Breakdown by End-use Industry

9.6 South and Central America

9.6.1 South and Central America Liquid Nitrogen Market Overview

9.6.2 South and Central America Liquid Nitrogen Market – Volume and Forecast to 2031 (Kilo Tons)

9.6.3 South and Central America Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.6.4 South and Central America Liquid Nitrogen Market Breakdown by Manufacturing Method

9.6.4.1 South and Central America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Manufacturing Method

9.6.5 South and Central America Liquid Nitrogen Market Breakdown by End-use Industry

9.6.5.1 South and Central America Liquid Nitrogen Market Volume and Forecast and Analysis – by End-use Industry

9.6.5.2 South and Central America Liquid Nitrogen Market Revenue and Forecast and Analysis – by End-use Industry

9.6.6 South and Central America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.6.6.1 South and Central America Liquid Nitrogen Market Volume and Forecast and Analysis – by Country

9.6.6.2 South and Central America Liquid Nitrogen Market Revenue and Forecast and Analysis – by Country

9.6.6.3 Brazil Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.6.6.3.1 Brazil Liquid Nitrogen Market Breakdown by Manufacturing Method

9.6.6.3.2 Brazil Liquid Nitrogen Market Breakdown by End-use Industry

9.6.6.4 Argentina Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.6.6.4.1 Argentina Liquid Nitrogen Market Breakdown by Manufacturing Method

9.6.6.4.2 Argentina Liquid Nitrogen Market Breakdown by End-use Industry

9.6.6.5 Rest of South and Central America Liquid Nitrogen Market – Revenue and Forecast to 2031 (US\$ Million)

9.6.6.5.1 Rest of South and Central America Liquid Nitrogen Market Breakdown by Manufacturing Method

9.6.6.5.2 Rest of South and Central America Liquid Nitrogen Market Breakdown by End-use Industry

10. COMPETITIVE LANDSCAPE

- 10.1 Heat Map Analysis by Key Players
- 10.2 Company Positioning & Concentration

11. INDUSTRY LANDSCAPE

- 11.1 Overview
- 11.2 Partnership
- 11.3 Acquisitions
- 11.4 Expansions And Other Strategic Developments

12. COMPANY PROFILES

- 12.1 Linde Plc
 - 12.1.1 Key Facts
 - 12.1.2 Business Description
 - 12.1.3 Products and Services
 - 12.1.4 Financial Overview
 - 12.1.5 SWOT Analysis
 - 12.1.6 Key Developments
- 12.2 L'Air Liquide SA
 - 12.2.1 Key Facts
 - 12.2.2 Business Description
 - 12.2.3 Products and Services
 - 12.2.4 Financial Overview
 - 12.2.5 SWOT Analysis
 - 12.2.6 Key Developments
- 12.3 Air Products and Chemicals Inc
 - 12.3.1 Key Facts
 - 12.3.2 Business Description
 - 12.3.3 Products and Services
 - 12.3.4 Financial Overview
 - 12.3.5 SWOT Analysis
 - 12.3.6 Key Developments
- 12.4 SOL SpA
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview

- 12.4.5 SWOT Analysis
- 12.4.6 Key Developments
- 12.5 Praxair Technology Inc
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Nippon Sanso Holdings Corp
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Ube Corporation
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 AIR WATER INC
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Gulf Cryo LLC
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 Osaka Gas Co Ltd
 - 12.10.1 Key Facts

- 12.10.2 Business Description
- 12.10.3 Products and Services
- 12.10.4 Financial Overview
- 12.10.5 SWOT Analysis
- 12.10.6 Key Developments
- 12.11 Tokyo Gas Chemicals Co., Ltd
 - 12.11.1 Key Facts
 - 12.11.2 Business Description
 - 12.11.3 Products and Services
 - 12.11.4 Financial Overview
 - 12.11.5 SWOT Analysis
 - 12.11.6 Key Developments
- 12.12 Messer SE & Co KGaA
 - 12.12.1 Key Facts
 - 12.12.2 Business Description
 - 12.12.3 Products and Services
 - 12.12.4 Financial Overview
 - 12.12.5 SWOT Analysis
 - 12.12.6 Key Developments
- 12.13 nexAir, LLC
 - 12.13.1 Key Facts
 - 12.13.2 Business Description
 - 12.13.3 Products and Services
 - 12.13.4 Financial Overview
 - 12.13.5 SWOT Analysis
 - 12.13.6 Key Developments
- 12.14 ADNOC Gas
 - 12.14.1 Key Facts
 - 12.14.2 Business Description
 - 12.14.3 Products and Services
 - 12.14.4 Financial Overview
 - 12.14.5 SWOT Analysis
 - 12.14.6 Key Developments
- 12.15 Matheson Tri-Gas, Inc
 - 12.15.1 Key Facts
 - 12.15.2 Business Description
 - 12.15.3 Products and Services
 - 12.15.4 Financial Overview
 - 12.15.5 SWOT Analysis

12.15.6 Key Developments

13. APPENDIX

13.1 About The Insight Partners

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