

South & Central America Cryogenic Pumps Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America Cryogenic Pumps Market is projected to grow from US\$ 195.9 million in 2024 to US\$ 244.5 million by 2031, reflecting a compound annual growth rate (CAGR) of 3.3% from 2025 to 2031.

Executive Summary and Market Analysis

South America (SAM) is notable for its variety of oil types, which significantly impacts the operational strategies within its oil and gas sector. Despite holding around 19% of the world's oil reserves, SAM contributes only 6% to global oil production. In Argentina, there was a substantial 47% drop in natural gas imports via pipeline during the first nine months of 2024 compared to the same period in 2023, largely due to the cessation of pipeline imports from Bolivia, which previously supplied about half of Argentina's natural gas. In response, Argentina is investing in infrastructure to improve the distribution of natural gas from the Vaca Muerta formation to northern regions, including converting pipelines originally intended for imports to facilitate exports to Brazil.

Natural gas exports to neighboring countries like Chile and Uruguay have increased, with exports to Chile rising by 14% in the first nine months of 2024, reaching approximately 0.25 billion cubic feet per day (Bcf/d). The newly operational Perito Francisco Pascasio Moreno gas pipeline, which began in 2023, is crucial for transporting natural gas from the Vaca Muerta formation to the Santa Fe and Buenos Aires provinces, thereby reducing dependence on LNG imports. As SAM enhances its natural gas production and export capabilities, the demand for cryogenic technologies, including cryogenic pumps, is expected to rise significantly. These pumps are vital for the efficient liquefaction, storage, and transportation of natural gas, especially as Argentina aims to become a net exporter. Ongoing investments in infrastructure and a

strategic focus on maximizing domestic production are anticipated to drive the growth of the cryogenic pump market in SAM, positioning the region as a significant player in the global energy landscape.

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 segments for 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 significant opportunities for the cryogenic pump market. As the demand for cleaner energy sources like liquefied natural gas (LNG) and hydrogen rises, the need for efficient cryogenic pumps to manage ultra-low temperature fluids becomes more critical. These pumps are essential in processes such as 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 grew 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 crucial for handling liquefied gases in these systems.

The rising 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 improving energy efficiency and reliability, further promoting market adoption. Increased investments in R&D are accelerating advancements in pump performance and application scope. Overall, the expanding energy sector is expected to sustain demand for advanced cryogenic pumping systems globally.

Country Insights

The South and Central America Cryogenic Pumps Market is segmented by country into Brazil, Argentina, and the Rest of South and Central America, with Brazil holding the largest market share in 2024.

Brazil offers a vibrant environment for the cryogenic pump market, fueled by its abundant natural resources, growing energy sector, and a commitment to sustainability. In 2023, Brazil produced an average of 3.4 million barrels of oil per day (Mb/d), making it the largest crude oil producer in SAM. According to the Energy Information Administration (EIA), over 90% of Brazil's oil production comes from deep-water oil fields. Brazil's oil and gas production rose by 13% in 2023 compared to 2022, with proven oil reserves reaching approximately 13 billion barrels, the second largest in South America after Venezuela. The development of new export terminals and the expansion of existing facilities will necessitate efficient cryogenic pumping systems for the safe and effective transport of natural gas.

Company Profiles

Key players in the market include Sulzer Ltd, Nkkiso 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.

Contents

1. INTRODUCTION

- 1.1 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 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. CRYOGENIC PUMPS MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
 - 4.3.5 List of Vendors in the Value Chain
 - 4.3.6 Average Selling Price - 2024 (Unit: US\$)
 - 4.3.7 Import Export Analysis, 2023 (Trade Value: US\$ Thousand)
 - 4.3.8 ESG Outlook

5. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. CRYOGENIC PUMPS MARKET - SOUTH AND CENTRAL AMERICA MARKET ANALYSIS

- 6.1 South and Central America Cryogenic Pumps Market Revenue (US\$ Million), 2024 - 2031
- 6.2 South and Central America Cryogenic Pumps Market Forecast and Analysis

7. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET REVENUE ANALYSIS - BY TYPE

- 7.1 Centrifugal
 - 7.1.1 Overview
 - 7.1.2 Centrifugal: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.2 Positive Displacement
 - 7.2.1 Overview
 - 7.2.2 Positive Displacement: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET REVENUE ANALYSIS - BY DESIGN TYPE

- 8.1 Submersible
 - 8.1.1 Overview
 - 8.1.2 Submersible: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 8.2 Non-Submersible
 - 8.2.1 Overview
 - 8.2.2 Non-Submersible: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET REVENUE ANALYSIS - BY CRYOGEN

9.1 Nitrogen

9.1.1 Overview

9.1.2 Nitrogen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Argon

9.2.1 Overview

9.2.2 Argon: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Oxygen

9.3.1 Overview

9.3.2 Oxygen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 LNG

9.4.1 Overview

9.4.2 LNG: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5 Hydrogen

9.5.1 Overview

9.5.2 Hydrogen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.6 Helium

9.6.1 Overview

9.6.2 Helium: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET REVENUE ANALYSIS - BY INDUSTRY VERTICAL

10.1 Electronics and Semiconductor

10.1.1 Overview

10.1.2 Electronics and Semiconductor: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 Healthcare and Pharmaceutical

10.2.1 Overview

10.2.2 Healthcare and Pharmaceutical: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3 Energy and Power

10.3.1 Overview

10.3.2 Energy and Power: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.4 Metallurgy

10.4.1 Overview

10.4.2 Metallurgy: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.5 Aerospace

10.5.1 Overview

10.5.2 Aerospace: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.6 Chemical

10.6.1 Overview

10.6.2 Chemical: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.7 Others

10.7.1 Overview

10.7.2 Others: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. SOUTH AND CENTRAL AMERICA CRYOGENIC PUMPS MARKET - COUNTRY ANALYSIS

11.1 South and Central America

11.1.1 South and Central America Cryogenic Pumps Market Revenue and Forecast and Analysis - by Country

11.1.1.1 South and Central America Cryogenic Pumps Market Revenue and Forecast and Analysis - by Country

11.1.2.2 Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.1.2.2.1 Brazil: South and Central America Cryogenic Pumps Market Share - by Type

11.1.2.2.2 Brazil: South and Central America Cryogenic Pumps Market Share - by Design Type

11.1.2.2.3 Brazil: South and Central America Cryogenic Pumps Market Share - by Cryogen

11.1.2.2.4 Brazil: South and Central America Cryogenic Pumps Market Share - by Industry Vertical

11.2.3.3 Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2.3.3.1 Argentina: South and Central America Cryogenic Pumps Market Share - by Type

11.2.3.3.2 Argentina: South and Central America Cryogenic Pumps Market Share - by Design Type

11.2.3.3.3 Argentina: South and Central America Cryogenic Pumps Market Share - by Cryogen

11.2.3.3.4 Argentina: South and Central America Cryogenic Pumps Market Share - by Industry Vertical

11.3.4.4 Rest of South and Central America: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.3.4.4.1 Rest of South and Central America: South and Central America Cryogenic Pumps Market Share - by Type

11.3.4.4.2 Rest of South and Central America: South and Central America Cryogenic Pumps Market Share - by Design Type

11.3.4.4.3 Rest of South and Central America: South and Central America Cryogenic Pumps Market Share - by Cryogen

11.3.4.4.4 Rest of South and Central America: South and Central America Cryogenic Pumps Market Share - by Industry Vertical

12 COMPETITIVE LANDSCAPE

12.1 Heat Map Analysis by Key Players

12.2 Company Positioning & Concentration

13 INDUSTRY LANDSCAPE

13.1 Overview

13.2 New Product Development

13.3 Merger and Acquisition

13.4 Other Strategic Developments

14 COMPANY PROFILES

14.1 Sulzer Ltd

14.1.1 Key Facts

- 14.1.2 Business Description
- 14.1.3 Products and Services
- 14.1.4 Financial Overview
- 14.1.5 SWOT Analysis
- 14.1.6 Key Developments
- 14.2 Nikkiso Co Ltd
 - 14.2.1 Key Facts
 - 14.2.2 Business Description
 - 14.2.3 Products and Services
 - 14.2.4 Financial Overview
 - 14.2.5 SWOT Analysis
 - 14.2.6 Key Developments
- 14.3 Fives SAS
 - 14.3.1 Key Facts
 - 14.3.2 Business Description
 - 14.3.3 Products and Services
 - 14.3.4 Financial Overview
 - 14.3.5 SWOT Analysis
 - 14.3.6 Key Developments
- 14.4 Cryostar SAS
 - 14.4.1 Key Facts
 - 14.4.2 Business Description
 - 14.4.3 Products and Services
 - 14.4.4 Financial Overview
 - 14.4.5 SWOT Analysis
 - 14.4.6 Key Developments
- 14.5 Ebara Elliott Energy
 - 14.5.1 Key Facts
 - 14.5.2 Business Description
 - 14.5.3 Products and Services
 - 14.5.4 Financial Overview
 - 14.5.5 SWOT Analysis
 - 14.5.6 Key Developments
- 14.6 Trillium US Inc.
 - 14.6.1 Key Facts
 - 14.6.2 Business Description
 - 14.6.3 Products and Services
 - 14.6.4 Financial Overview
 - 14.6.5 SWOT Analysis

- 14.6.6 Key Developments
- 14.7 SHI Cryogenics Group
 - 14.7.1 Key Facts
 - 14.7.2 Business Description
 - 14.7.3 Products and Services
 - 14.7.4 Financial Overview
 - 14.7.5 SWOT Analysis
 - 14.7.6 Key Developments
- 14.8 CRYOGENIC MACHINERY CORP
 - 14.8.1 Key Facts
 - 14.8.2 Business Description
 - 14.8.3 Products and Services
 - 14.8.4 Financial Overview
 - 14.8.5 SWOT Analysis
 - 14.8.6 Key Developments
- 14.9 Ruhrpumpen, Inc.
 - 14.9.1 Key Facts
 - 14.9.2 Business Description
 - 14.9.3 Products and Services
 - 14.9.4 Financial Overview
 - 14.9.5 SWOT Analysis
 - 14.9.6 Key Developments
- 14.10 Vanzetti Engineering S.p.A.
 - 14.10.1 Key Facts
 - 14.10.2 Business Description
 - 14.10.3 Products and Services
 - 14.10.4 Financial Overview
 - 14.10.5 SWOT Analysis
 - 14.10.6 Key Developments
- 14.11 PHPK Technologies
 - 14.11.1 Key Facts
 - 14.11.2 Business Description
 - 14.11.3 Products and Services
 - 14.11.4 Financial Overview
 - 14.11.5 SWOT Analysis
 - 14.11.6 Key Developments
- 14.12 Technex Limited
 - 14.12.1 Key Facts
 - 14.12.2 Business Description

- 14.12.3 Products and Services
- 14.12.4 Financial Overview
- 14.12.5 SWOT Analysis
- 14.12.6 Key Developments
- 14.13 Barber-Nichols, Inc.
 - 14.13.1 Key Facts
 - 14.13.2 Business Description
 - 14.13.3 Products and Services
 - 14.13.4 Financial Overview
 - 14.13.5 SWOT Analysis
 - 14.13.6 Key Developments
- 14.14 HSR AG
 - 14.14.1 Key Facts
 - 14.14.2 Business Description
 - 14.14.3 Products and Services
 - 14.14.4 Financial Overview
 - 14.14.5 SWOT Analysis
 - 14.14.6 Key Developments
- 14.15 GemmeCotti Srl
 - 14.15.1 Key Facts
 - 14.15.2 Business Description
 - 14.15.3 Products and Services
 - 14.15.4 Financial Overview
 - 14.15.5 SWOT Analysis
 - 14.15.6 Key Developments

15. APPENDIX

- 15.1 About The Insight Partners

List Of Tables

LIST OF TABLES

- Table 1. South and Central America Cryogenic Pumps Market Segmentation
- Table 2. List of Vendors
- Table 3. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Table 4. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type
- Table 5. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design Type
- Table 6. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Cryogen
- Table 7. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Industry Vertical
- Table 8. South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country
- Table 9. Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type
- Table 10. Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design Type
- Table 11. Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Cryogen
- Table 12. Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Industry Vertical
- Table 13. Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type
- Table 14. Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design Type
- Table 15. Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Cryogen
- Table 16. Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Industry Vertical
- Table 17. Rest of South and Central America: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type
- Table 18. Rest of South and Central America: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design Type
- Table 19. Rest of South and Central America: South and Central America Cryogenic

Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Cryogen

Table 20. Rest of South and Central America: South and Central America Cryogenic

Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Industry Vertical

Table 21. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. South and Central America Cryogenic Pumps Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Cryogenic Pumps Market

Figure 4. South and Central America Cryogenic Pumps Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. South and Central America Cryogenic Pumps Market Revenue (US\$ Million), 2024 - 2031

Figure 7. South and Central America Cryogenic Pumps Market Share (%) - by Type, 2024 and 2031

Figure 8. Centrifugal: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Positive Displacement: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. South and Central America Cryogenic Pumps Market Share (%) - by Design Type, 2024 and 2031

Figure 11. Submersible: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Non-Submersible: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. South and Central America Cryogenic Pumps Market Share (%) - by Cryogen, 2024 and 2031

Figure 14. Nitrogen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Argon: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Oxygen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. LNG: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Hydrogen: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Helium: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Others: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. South and Central America Cryogenic Pumps Market Share (%) - by Industry Vertical, 2024 and 2031

Figure 22. Electronics and Semiconductor: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Healthcare and Pharmaceutical: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Energy and Power: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Metallurgy: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Aerospace: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. Chemical: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Others: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 29. South and Central America Cryogenic Pumps Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 30. Brazil: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 31. Argentina: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 32. Rest of South and Central America: South and Central America Cryogenic Pumps Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 33. Company Positioning & Concentration

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