

## **Neon Gas Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook (2025-2034)**

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### **Report description:**

The global neon gas market attained a value of USD 367.60 Million in 2024. The market is further expected to grow in the forecast period of 2025-2034 at a CAGR of 7.50%, to reach USD 757.64 Million by 2034. The market for neon gas is highly significant, as it supports a high-tech industries, especially in semiconductor manufacturing, excimer lasers and lithography. Due to its essential role in the fabrication of microchips and its use in different laser technologies, neon gas is the basic component of technological processes used in consumer electronics, telecommunication, and healthcare technology. As several new applications for neon emerged in industries from consumer electronics to the automotive and healthcare sectors, the demand for neon has continued to increase against a backdrop of growing production due to the emergence of 5G networks and electric vehicles and unreliable supply from the former Soviet Union due to the invasion of Ukraine.

The supply chain dynamics have gotten more complex with geopolitical factors as the conflict in Ukraine and Russia has been impacting the global supply of neon. By 2022, Ukraine was expected to supply 50% of the world's neon, mostly because to the Soviet steel industry . Both countries are key producers and disruptions in their markets have destabilized global markets, generating further demand for stable neon sources. This demand for neon gas is expected to increase as the industry progresses, particularly for its applications such as medical imaging and laser applications. This growth will be propelled by the growing dependence on neon in various industries, including telecommunications, semiconductor manufacturing , and healthcare applications.

Supply chain disruptions and high production costs have created challenge for the neon gas market. Liberties have been taken to present gases and derivatives as far removed from high-quality materials; extraction technologies are central for providing industrial gas consumption. From its multiple industrial applications to its cardboard future, the neon market's continued expansion will depend on navigating these challenges, according to the U.S. Energy Information Administration.

The neon gas market is important to many industries, from steel production and high-tech manufacturing to medical technologies.

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However, the COVID-19 pandemic has made high production costs and supply chain disruptions as few approaches to face the market. Production of neon gas is heavily dependent on energy-intensive processes including extraction and purification processes which ultimately increases production cost and energy consumption. Neon is a major consumer-driven element in the steel industry as it is needed for production process quality control and guarantees production expense uniformity. However, energy costs and production costs are still one of the biggest concerns, with the increasing demand for neon gas supply, especially from semiconductor factories. These are tracked by the International Energy Agency, giving consumers an idea of market growth and energy consumption trends. To address these issues, companies are working to enhance extraction methods with quality control and maintain a steady supply of neon gas.

### Neon Gas Market Trends

The neon gas industry is picking up pace, fueled by demand from advanced semiconductor manufacturing technologies and data centers. The semiconductor sector is responsible for up to 90% of neon gas laser demand. Neon gas is a key component in the manufacture of microchips, predominantly in extreme ultraviolet (EUV) lithography, a process that is critical for advanced semiconductors and 5G infrastructure. Neon gas is also used in high-purity excimer lasers for AI, IoT, and autonomous vehicles. In 2018, Linde and Praxair announced their merger, accounting for around 70% of U.S. excimer gas output. However, rising consumption of neon gas, coupled with geopolitical factors including supply chain disruptions in specific regions, especially Ukraine and Russia, endangers the availability of the neon gas production sources. As a result, the companies from high-tech industries are looking for alternative production channels for the stable supply of neon gas or boosting recycling capabilities. This trend complements the increasing demand for advanced semiconductor technologies in high-purity neon gas applications. Continued market growth through overcoming supply-side challenges will bolster technological progress across sectors.

### Supply Mode Insights

Demand for neon gas depends on various supply modes. Cylinders are used for smaller applications, allowing for portability and ease of use. Industries needing larger volumes of neon use bulk and micro bulk supply modes demand for a more useable and cost-effective option for high-consuming operations. Drum tanks are a middle ground solution, providing more storage than cylinders but a smaller requirement than bulk supplies make them ideal for medium-sized needs.

In situations with continued or high-volume demand, such as semiconductor manufacturing and laser applications, on-site supply modes are growing in prevalence. This means neon gas is delivered and stored at the customer site, providing a continuous, always-on supply while eliminating logistics issues. However, each supply mode is designed for certain needs, and the choice of supply model is determined by factors such as production scale, cost-effectiveness, and requirements to operate. Industrial segments as well as Automotive segments change from industry to industry, and can meet a Big Number of demands that we see in all industries, also driving the market high and driving market flexibility high up.

### Application Insights

In the field of lasers, neon gas is a vital component specifically in excimer lasers, which have high precision applications in use cases like semiconductors and medical treatments. In signage and lighting neon's capability of emitting bright, vivid colors is widely used for neon signs, and decorative lighting. Neon gas is widely used in microchip manufacturing in the electronics and semiconductor industry, and is an important component in lithography processes.

Neon is used in cooling and refrigeration technologies, benefiting cryogenic applications due to its physical properties. Neon gas creates the necessary atmosphere to manufacture displays in the LCD industry. Moreover, within imaging technologies, neon is critical to some of its most high-resolution technologies, including those used for medical and diagnostic reasons.

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## Distribution Channel

Various distribution channels are employed in the market to cater to the different applications in industries. Direct sales are one of the main channels, especially with large-scale customers that are in need of a continuous high-volume supply of neon gas. This model helps provide customized service, client-specific solutions, and long-term contracts with sectors ranging from semiconductor fabrication to medical imaging. Neon gas also gets sold through distributors and wholesalers, who supply the gas to smaller businesses or regional markets. They offer varying quantities and typically cater to a broader set of industries, ranging from signage to electronics.

One of the significant distribution channels is online retail, as it provides the doorstep facilities, especially for those who need small quantities of neon gas or specialized products. This channel allows for ordering simplicity (both via orders and subscription), time-sensitive delivery, and transparent unit pricing, which suit such industries with less predictable demand or specific gas purity level needs.

## End Use Insights

Neon gas is used across various end-use sectors, stimulating innovation and supporting key technologies. Neon is used in the aerospace and aircraft sector for high-performance lighting and display systems, providing visibility and durability in harsh environments. Neon gas is also used in automotive and transportation equipment for various lighting purposes, including dashboard displays and signaling systems, enhancing both functionality and aesthetics.

The electronics sector is one of the biggest consumers for neon, where it underpins semiconductor production, microchip creation, and the manufacture of high-precision components. Neon's part in lasers, lithography and other processes provides dependability and performance of electronics. In medicine, another application of neon gas is in medical imaging, specifically in technologies such as magnetic resonance imaging (MRI) and positron emission tomography (PET) scans, where neon serves to create better quality, sharper images for diagnostics. Industries utilizing neon gas range from semiconductor manufacturing to laser technology and lighting. This on-going development of these end use applications promises market growth in the coming years.

## Regional Insights

### North America Neon Gas Market

The neon gas market in North America, particularly in the United States is on a steady rise, with demand coming from high-tech industries including semiconductor manufacturing, medical imaging, and lasers. New demand for ultra-pure neon gas comes from the growing data centers, 5G infrastructure and consumer electronics sectors. Thus, market growth is also fueled by the technological developments and increased use of neon in AI and IoT applications.

### Europe Neon Gas Market Trends

D helium backfill as a major factor driving the growth of the neon gas market in Europe. Demand for neon gas used in lasers, lithography and microchip production is driving growth. The Rollout of 5G Networks and emerging next generation technologies are other factors that are driving the market growth.

In the UK, the neon gas market is influenced by its robust industrial sectors, including electronics, healthcare, and aerospace. Demand for high-purity neon for semiconductor production and medical imaging is on the rise, supporting the continued growth of the market.

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## Asia Pacific Neon Gas Market Trends

The Asia Pacific region's neon gas market is dominated by China, due to the scale of its semiconductor manufacturing and electronics industries. The country's inroads into rapidly expanding technology sectors, specifically AI, 5G and automotive, are driving neon demand. The continued investment in industrial applications ensures a steady supply of neon gas.

## Latin America Neon Gas Market Trends

One of the factors contributing to Latin American neon gas market expansion is the increasing electronics and automotive sector. Demand for high-purity neon is being driven by increased investment in telecommunications and medical technologies. The increase in the end-user industries within the region is bolstering the increased utilization of neon gas for several applications.

## Key Neon Gas Companies Insights

Major neon gas suppliers are fulfilling the increasing demand in a wide range of industries, from semiconductor production to medical imaging and telecommunications. These companies ensure a supply of high-purity neon gas as the pipeline suffers from supply chain issues and work on extraction technologies. These top firms are expanding their production capacities with a focus on quality control as well as innovative solutions to meet the diverse demands of various sectors across the globe by adopting alternative sources.

## Key Neon Gas Companies

- ? Linde plc
- ? Air Liquide S.A. (Air Liquide)
- ? Ingas LLC
- ? Cryoin Engineering Ltd.
- ? Messer Group GmbH
- ? Matheson Tri-Gas, Inc
- ? Taiyo Nippon Sanso Corporation
- ? Air Products
- ? Iceblick Ltd
- ? Airgas, Inc.
- ? Proton Gases
- ? Universal Industrial Gases, Inc
- ? Electronic Fluorocarbons LLC
- ? Others

## Neon Gas Industry News

October 2024

Linde revealed plans to acquire two additional large ASUs, more than doubling its on-site capacity. Both ASUs are currently under construction, with the plants slated to be transferred in 2025. Linde has also inked a long-term supply arrangement with Tata Steel for oxygen, nitrogen, and argon to assist the latter's large capacity expansion project.

April 2024

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SK hynix announced the successful creation of the industry's first neon gas recycling technology alongside TEMC, a South Korean specialized gas manufacturer for the semiconductor industry. As recent geopolitical turmoil has heightened concern about the import-reliant supply of neon, SK hynix's engagement with local partners aims to address this issue, and has resulted in a substantial accomplishment in just a year.

December 2023

EFC Gases & Advanced Materials (EFC) created a new neon gas recycling technology, which will provide end users with long-term, consistent neon pricing. Cymer, an industrial equipment specialist, has previously validated the Massachusetts-based company's technology for use with excimer lasers.

January 2023

Linde announced the acquisition of the remaining shares in nexAir, LLC, one of the major independent packaged gas distributors in the United States, with estimated 2022 sales of \$400 million.

September 2021

Nacero Inc. announced the debut of Nacero NEONTM, a renewable natural gas (RNG) procurement platform. Nacero NEONTM is the strategic growth engine behind Nacero Green GasolineTM, an inexpensive net-zero carbon footprint gasoline for everyday drivers.

#### Global Neon Gas Market Report Segmentation

The study on the neon gas market delivers detailed analysis on region-level perspective depending on specific contemporary industry trends. It considers various segments, such as supply mode, application, distribution channel, and end use. By assessing all these segments, this report presents a thorough discussion of market drivers, regulations, and emerging opportunities observed in the market.

#### Market Breakup by Application

? Lasers

? LCD

? Signage and lighting

??? Neon signs

??? Neon lighting for architecture

??? Neon art and decorative lighting

? Electronics and semiconductor industry

??? Plasma display panels (pdps)

??? Neon indicator lamps

??? Gas lasers

? Cryogenic applications

??? Cryogenic refrigeration

??? Cryogenic pumping systems

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? Others

#### Market Breakup by End Use

? Aerospace and Aircraft

? Automotive and Transportation Equipment

? Electronics

? Healthcare

? Others

#### Market Breakup by Supply Mode

? Cylinders

? Bulk & micro bulk

? Drum tanks

? On-site

#### Market Breakup by Distribution Channel

? Direct sales

? Distributors and wholesalers

? Online retail

#### Market Breakup by Region

? North America

??? United States of America

??? Canada

? Europe

??? United Kingdom

??? Germany

??? France

??? Italy

??? Others

? Asia Pacific

??? China

??? Japan

??? India

??? ASEAN

??? Australia

??? Others

? Latin America

??? Brazil

??? Argentina

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??? Mexico

??? Others

? Middle East and Africa

??? Saudi Arabia

??? United Arab Emirates

??? Nigeria

??? South Africa

??? Others

More Insights On

South Korea Neon Gas Market

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