

High Purity Gas Market by Type (High Atmospheric Gas, Noble Gas, Carbon Gas, Other Gases), Storage & Distribution and Transportation, Function, Manufacturing Process, End-use Industry, and Region - Global Forecast to 2030

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Report description:

The high purity gas market is estimated at USD 37.46 billion in 2025 and is projected to reach USD 52.78 billion by 2030, at a CAGR of 7.1% from 2025 to 2030. The market for high purity gas is propelled by the rising demand from the semiconductor, electronics, and healthcare sectors due to the critical need for precision and contamination-free environments. The growth of the semiconductor production manufacturing sector, driven by advancements in AI chips, electric vehicles, and 5G infrastructure, is significantly boosting the demand for ultra-high purity gases such as nitrogen, argon, and hydrogen. The increasing use of analytical instruments in the pharmaceuticals, biotechnology sectors, and research laboratories is also contributing to the growth of the high purity gas market. Further, the increasing investments in industrial automation and renewable energy solutions like photovoltaics are also increasing the demand for high purity gas solutions globally.

<https://mnmimg.marketsandmarkets.com/Images/high-purity-ultra-pure-gas-market-new-overview.webp>

"The merchant liquid segment accounted for the second-largest share of the overall high purity gas market in 2024." Based on storage & transportation and distribution, the merchant liquid segment captured the second-largest share of the overall high purity gas market in 2024. The market in this segment is driven by its cost-effectiveness and logistical-conditional balance. Merchant liquid supply acts as a common-sense middle point between less economical bulk pipeline deliveries and high-cost cylinder deliverables, serving industries demanding medium to large gas volumes at consistent purity levels. Recent advancements in cryogenic tank configurations and insulated transportation systems have enhanced the safety and efficiency of long-distance liquid gas deliveries. Its scalable delivery capabilities offer suppliers distinct advantages of delivering gas to multiple customers across the semiconductors, chemicals, and healthcare sectors, all without the requirement for investment in a

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dedicated pipeline. As such, merchant liquid gas continues to be a suitable option for all regions and decentralized approaches.

"The hydrogen production manufacturing process accounted for the second-largest share of the high purity gas market in 2024." In 2024, the hydrogen production process was the second-largest segment of the high purity gas market, owing to the continued large-scale use in a variety of industries, such as semiconductors, flat panel displays, and pharmaceuticals, that require ultra-high purity hydrogen for reducing atmospheres and carrier gas applications. Increasing investment in green hydrogen and a cleaner refining process has also created more demand for purification technologies to produce the necessary electronic-grade hydrogen. Hydrogen's growing utilization in new applications like fuel cells and energy storage also contributed to demand for high purity hydrogen production via PSA and membranes. Hydrogen's established industrial usage, and now new energy-based opportunities, have provided hydrogen with a strong market position.

"North America accounted for the second-largest share of the global high purity gas market in 2024."

In 2024, North America accounted for the second-largest share in the global high purity gas market. The market in the region is driven by the strong semiconductor manufacturing, presence of advanced healthcare system, and sophisticated research ecosystem. Recently, growing investments in chip fabrication, exemplified by the U.S. CHIPS and Science Act, have created increased demand for ultra-high purity gases such as nitrogen, argon, and hydrogen. Additionally, a number of major pharmaceutical and biotechnology companies benefit from the presence of high purity gas manufacturing companies in the region, where R&D is also becoming more important across the life sciences and materials design. North America's strong high purity gas market share is supported by established distribution networks, advancements in purification systems, and strict quality standards.

This study has been validated through primary interviews with industry experts globally. The primary sources have been divided into the following three categories:

-□By Company Type: Tier 1 - 40%, Tier 2 - 33%, and Tier 3 - 27%

-□By Designation: C-level - 50%, Director-level - 30%, and Managers - 20%

-□By Region: North America - 15%, Europe - 50%, Asia Pacific - 20%, Middle East & Africa - 10%, and Latin America - 5%

The report provides a comprehensive analysis of the following companies:

Prominent companies in this market include Linde Plc (Ireland), Air Liquide (France), Air Products and Chemicals, Inc. (US), Iwatani Corporation (Japan), Messer SE & Co. KGaA (Germany), Daigas Group (Japan), Nippon Sanso Holdings Corporation (Mitsubishi Chemical Group Corporation, Japan), SOL Spa (Italy), Ingas (Ukraine), Gruppo SIAD (Italy), and Resonac Holdings Corporation (Japan).

Research Coverage

This research report categorizes the high purity gas market by type (high atmospheric gas, noble gas, carbon gas and other gases), by storage & distribution and transportation (cylinders/package gas, merchant liquid, tonnage), by manufacturing process (air separation technology, hydrogen production), by function (insulation, illumination, coolant), end-use industry (electronics, metal production, chemicals, oil & gas, medical & healthcare, food & beverages, and other end-use industries), and region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America). The scope of the report includes detailed information about the major factors influencing the growth of the high purity gas market, such as drivers, restraints, challenges, and opportunities. A thorough examination of the key industry players has been conducted to provide insights into their business overview, solutions and services, key strategies, and recent developments in the high purity gas market. This report includes a competitive analysis of upcoming startups in the high purity gas market ecosystem.

Reasons to buy this report

The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall high purity gas market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The

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report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

-□Analysis of key drivers (Rising demand for solar photovoltaic panels, increasing demand from electronics industry), restraints (High cost of gas processing, Stringent regulatory environment), opportunities (Growing demand from chemical and automotive industries, rising applications in medical and pharmaceutical sectors), and challenges (Technological disruptions, production and supply chain complexities) influencing the growth of the high purity gas market

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and product launches in the high purity gas market

-□Market Development: Comprehensive information about lucrative markets-the report analyses the high purity gas market across varied regions.

-□Market Diversification: Exhaustive information about services, untapped geographies, recent developments, and investments in the high purity gas market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players, such as Linde Plc (Ireland), Air Liquide (France), Air Products and Chemicals, Inc. (US), Iwatani Corporation (Japan), Messer SE & Co. KGaA (Germany), Daigas Group (Japan), Nippon Sanso Holdings Corporation (Mitsubishi Chemical Group Corporation, Japan), SOL Spa (Italy), Ingas (Ukraine), Gruppo SIAD (Italy), Resonac Holdings Corporation (Japan), Alchemie Gases & Chemicals Pvt. Ltd. (India), Bhuruka Gases Limited (India), Chemix Specialty Gases and Equipment (India), Ultra Pure Gases (I) Pvt. Ltd. (India), Coregas (Australia), Seralgaz (Turkey), PurityPlus (US), Woikoski Oy (Finland), Specialty Gases Company Limited (Saudi Arabia), American Welding and Gas (US), and Qingdao Baigong Industrial and Trading Co., Ltd. (China)

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