

**EIGA**



THE EUROPEAN  
INDUSTRIAL GASES  
INDUSTRY



Facts & Figures  
**2025**

May 2026

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“ From healthcare and food to manufacturing and the energy transition, Industrial Gases quietly underpin Europe’s economy. This publication sheds light on an industry that supports safety, resilience and Europe’s climate ambitions. ”

**Philippe Cornille,**  
General Secretary



**O<sub>2</sub>** = Oxygen

**CO<sub>2</sub>** = Carbon dioxide

**Nm<sup>3</sup>** = Normal cubic meter

**N<sub>2</sub>** = Nitrogen

**GHG** = Greenhouse gas

**H<sub>2</sub>** = Hydrogen



Data is for base **year 2025** and for EU27 unless specified otherwise.



# The Association

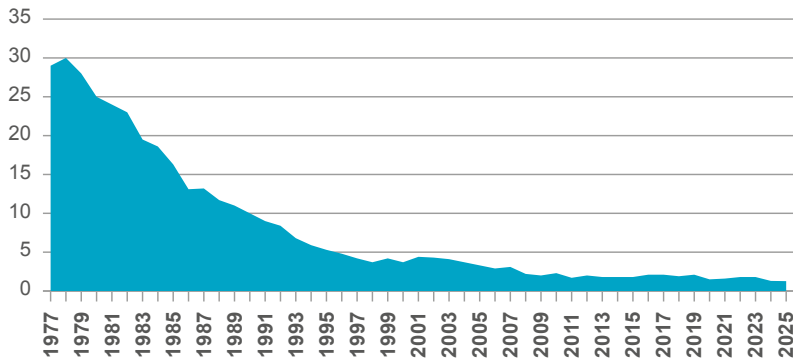




## IMPROVING SAFETY RECORD

Lost Time Incidents (LTI) from across our industry show the effectiveness of our safety campaigns since the late 1970s with a tenfold reduction in LTI frequency.

LTI Frequency Rate



Source: EIGA

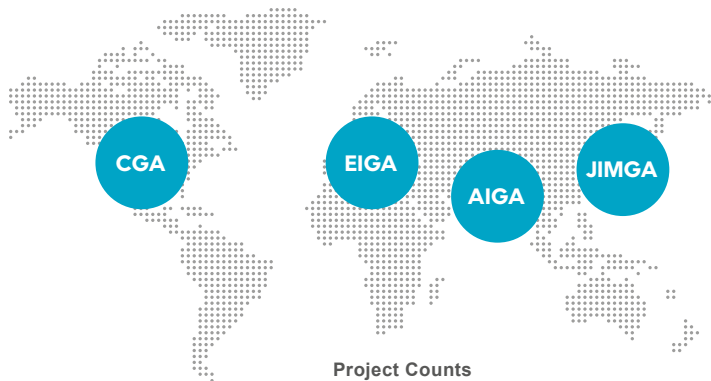






## 76 PUBLICATIONS HAVE BEEN GLOBALLY HARMONISED

The American, Asian, European and Japanese IG associations form the International Harmonisation Council to develop and promote a globally unified industry best practices. These harmonised publications enhance safety consistently, wherever Industrial Gases are produced, distributed or used.



COMPLETED



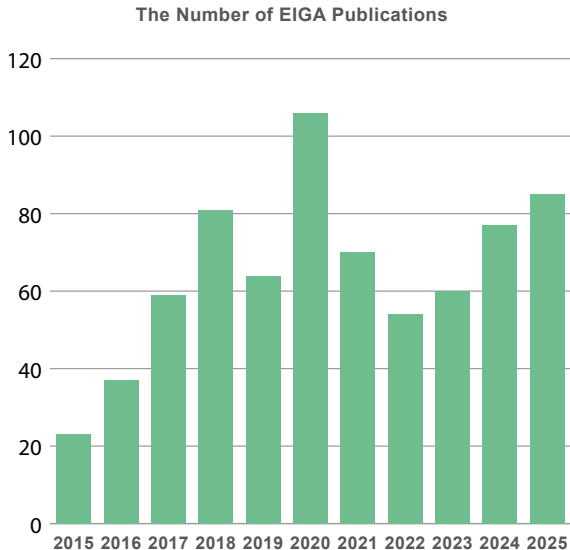
IN PROGRESS

Source: EIGA



## ON AVERAGE, A PUBLICATION IS PUBLISHED EVERY WEEK

The combined expertise of EIGA members is captured in over 500 publications. The largest portion is made available for all on our website.



Source: EIGA







## THE WORKING GROUP EXPERTS FORM EIGA'S BEATING HEART

Experts from all over Europe and beyond gather in EIGA working groups. On average such group comprises around 7 experts, and meets quarterly.





# The Market

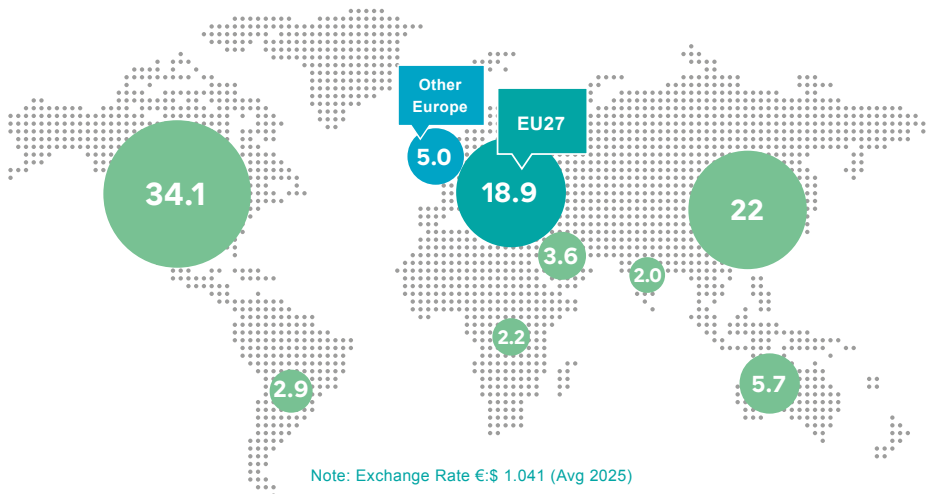






# THE EU IS THE THIRD LARGEST IG MARKET IN THE WORLD

The Worldwide IG market reached €96,4 Bn in 2025.



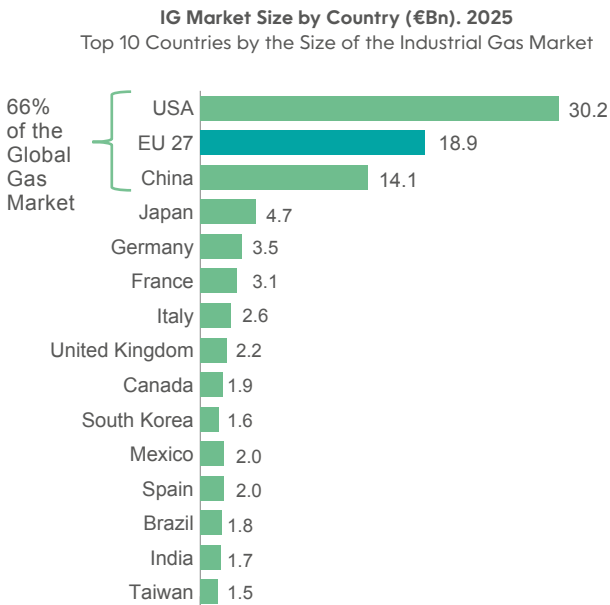
Note: Exchange Rate €:\$ 1.041 (Avg 2025)

Source: gasworld Business Intelligence



# THE EU27, USA AND CHINA ARE THE THREE LARGEST IG MARKETS

Germany, France, Italy and UK are the largest European Industrial Gas markets.



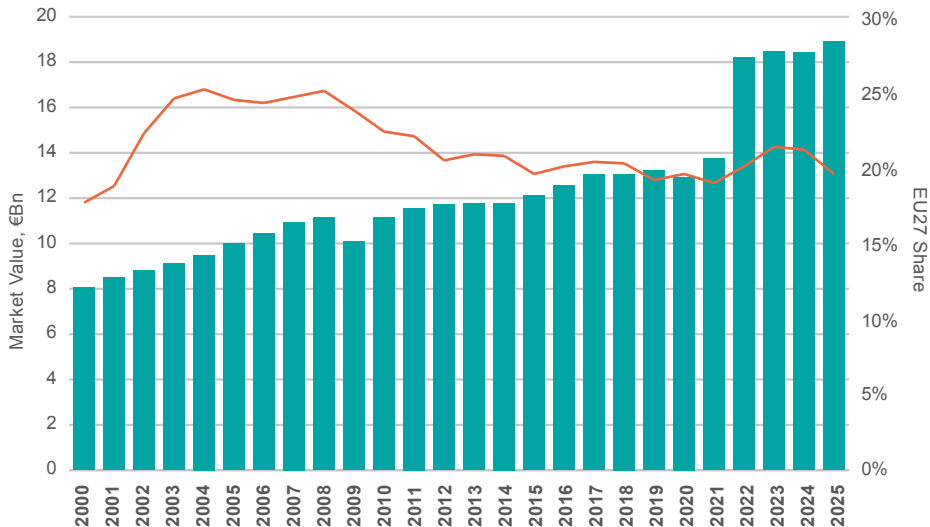
Source: gasworld Business Intelligence



## EU27 MARKET GROWTH AVERAGED 4.9% PER YEAR IN 2015-2025

After a decade of sustained growth, the EU market has entered a phase of relative stabilisation. Levels in the most recent year remain close to those observed in 2023, despite a modest downward adjustment.

EU27 Market Size vs Global Gas Market 2024

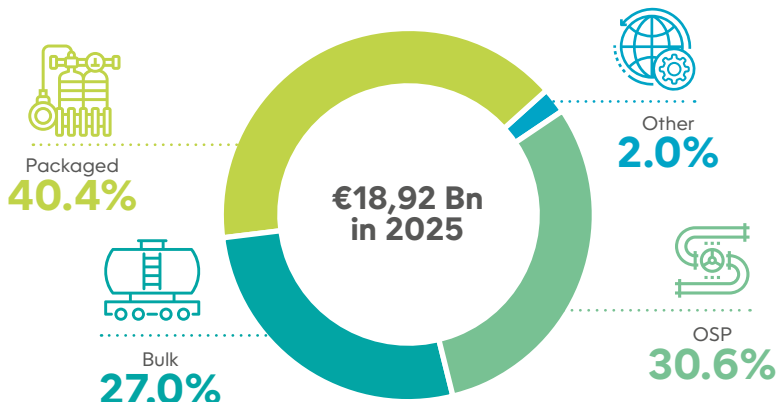


Source: gasworld Business Intelligence



## THE MODE OF SUPPLY, IN PERCENTAGE TERMS, HAS BEEN STABLE OVER THE LAST 20 YEARS

The EU gas market (by value) appears mature with packaged gases remaining the largest mode of supply.



- **OSP** – onsite or pipeline gas supply;
- **Bulk** – gas supplied in liquid form to customers (incl. microbulk and tube trailer business);
- **PG** – compressed gas supplied in cylinders/bundles;
- **Other** – any other delivery of gas not covered by the above methods. This includes dry ice and revenues generated from licences and special chemical gases.

Source: gasworld Business Intelligence

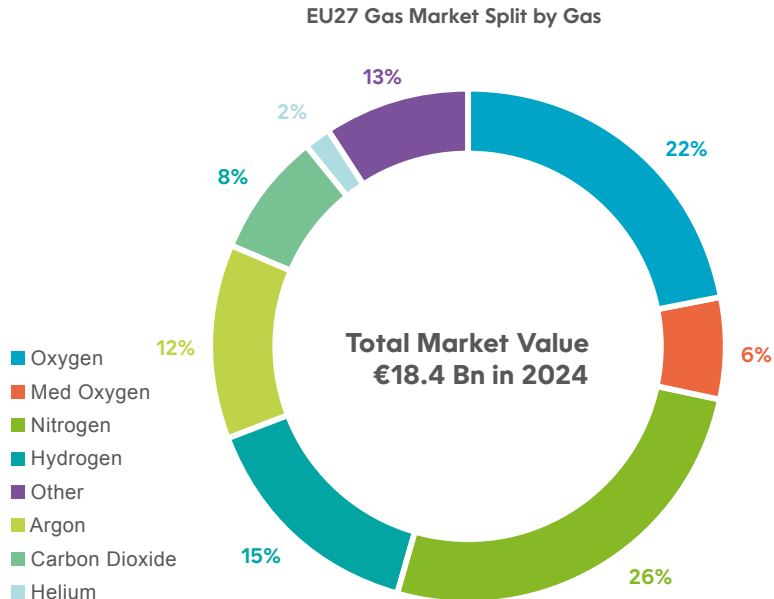






# OXYGEN AND NITROGEN REMAIN THE MOST WIDELY USED GASES IN THE EU27

Altogether O<sub>2</sub> (including medical) and N<sub>2</sub> account for about 56% of the gas market.



Source: gasworld Business Intelligence

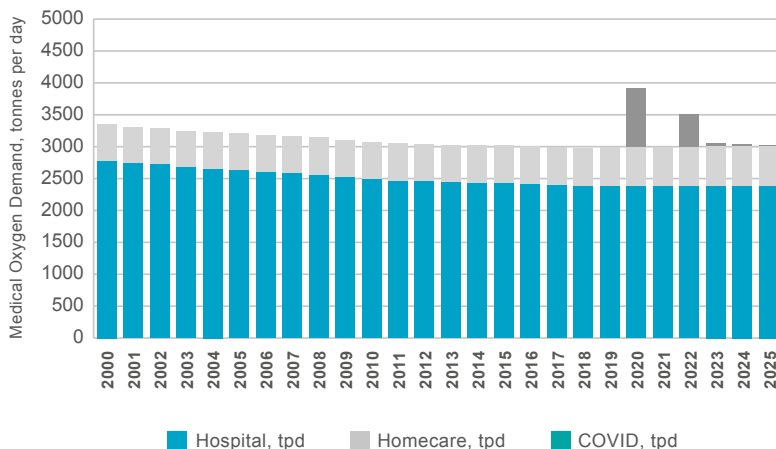


## AVERAGE MEDICAL OXYGEN DEMAND SIGNIFICANTLY INCREASED IN 2020-21

Medical oxygen demand has stabilised following the temporary surge observed during the 2020-21 pandemic period. Current demand levels remain slightly above pre-pandemic baselines but are no longer influenced by exceptional healthcare pressures.

Looking ahead, homecare oxygen demand is expected to continue increasing steadily, driven by demographic trends, including an ageing population and a higher prevalence of chronic respiratory conditions, partially offset by improvements in disease management and healthcare efficiency. In contrast, hospital-based oxygen demand is gradually declining, reflecting ongoing reductions in average hospital bed capacity and continued optimisation of healthcare delivery.

### Medical Oxygen Demand



Source: gasworld Business Intelligence



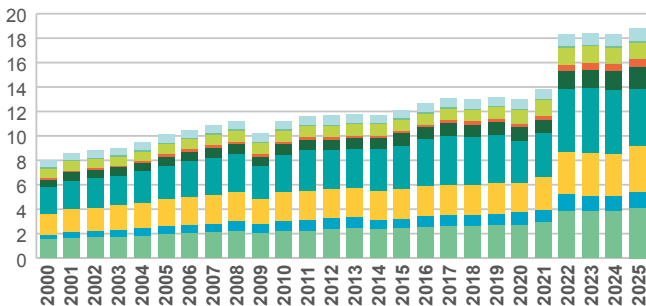




# FOUR INDUSTRIAL SECTORS ACCOUNT FOR OVER 70% OF THE IG MARKET

Chemicals, Refining/Energy, Metallurgy and Food sectors have all driven growth in the EU over the past 20 years. Electronics sector is a new driver, which potentially will be stronger than the traditional sectors of growth in the long term.

Gas Market Split by End User



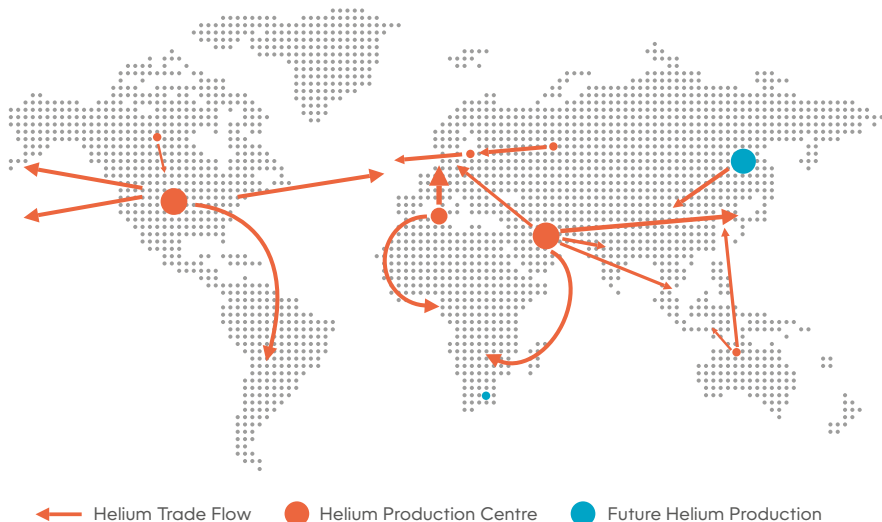
Source: gasworld Business Intelligence

- **Chemicals** – basic chemicals, plastics, rubber, petrochemicals, pharmaceuticals;
- **Refining & Energy** – refineries, nuclear energy;
- **Metallurgy** – ferrous, non-ferrous metals manufacturing;
- **Manufacturing** – fabricated metal products, machinery, vehicles, trains, aerospace etc;
- **Food** – food, drinks, tobacco;
- **Electronics** – electronic products/elements manufacturing;
- **Pulp & Paper** – pulp and paper manufacturing;
- **Healthcare** – mostly medical oxygen for hospitals (liquid and gaseous);
- **Glass** – glass manufacturing;
- **Others** – waste & water treatment, fire extinguishers, R&D.



## TRADE IN INDUSTRIAL GASES IS MAINLY LIMITED TO HELIUM

The total demand worldwide was approximately 191 Nm<sup>3</sup> in 2025. Europe share keeps relatively stable at about 33%.



Source: Spiritus Consulting

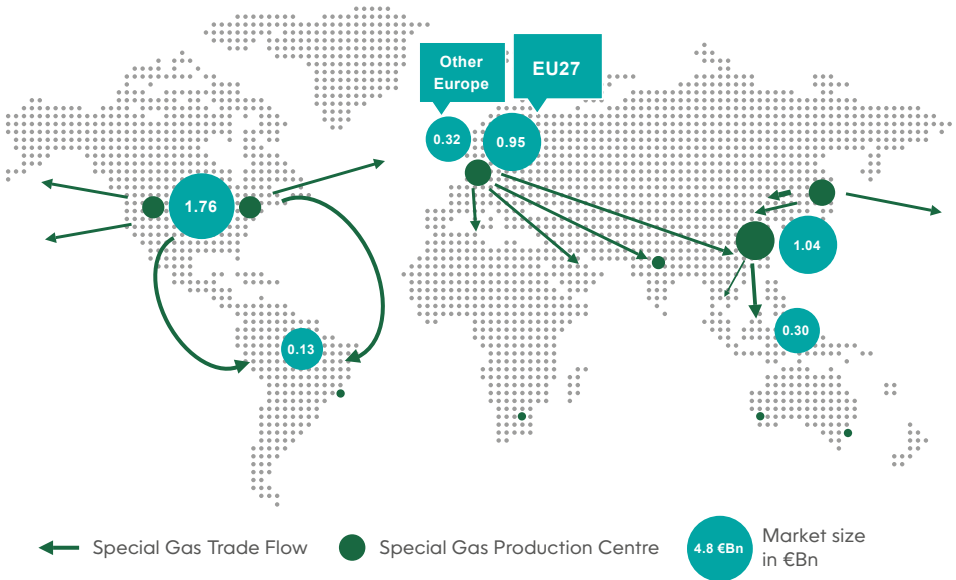






# TRADE IN SPECIAL GASES

There are many types of special gases and electronic gases traded across the globe. The EU both manufactures and trades special gases and is the second largest special gases market in the world.



Source: Spiritus Consulting



# Decarbonisation



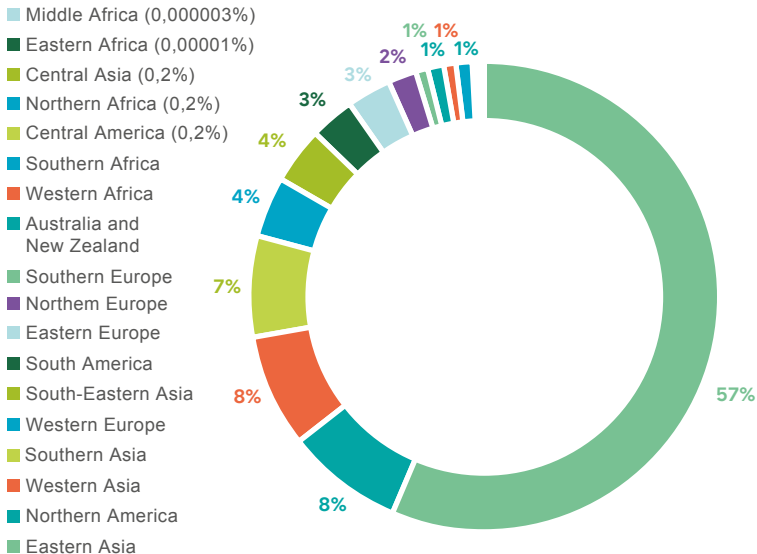




# HYDROGEN PRODUCTION CAPACITY IN EUROPE

Following a decade of continuous growth, the EU market reached a peak before entering a phase of contraction. The latest data show a marked decline compared to recent years, suggesting changing market conditions.

Installed Capacities 2025

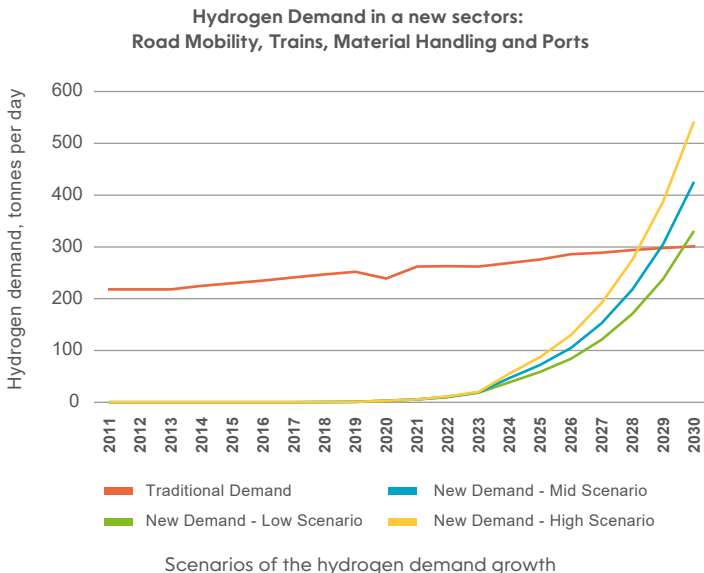


Source: gasworld Business Intelligence



# THE HYDROGEN ECONOMY - THE NEW OPPORTUNITY

The EU is speedily embracing the energy transition and hydrogen is expected to play an ever-increasing role – especially in mobility within Europe. The transition has already begun but the most growth is expected to take place post 2030.

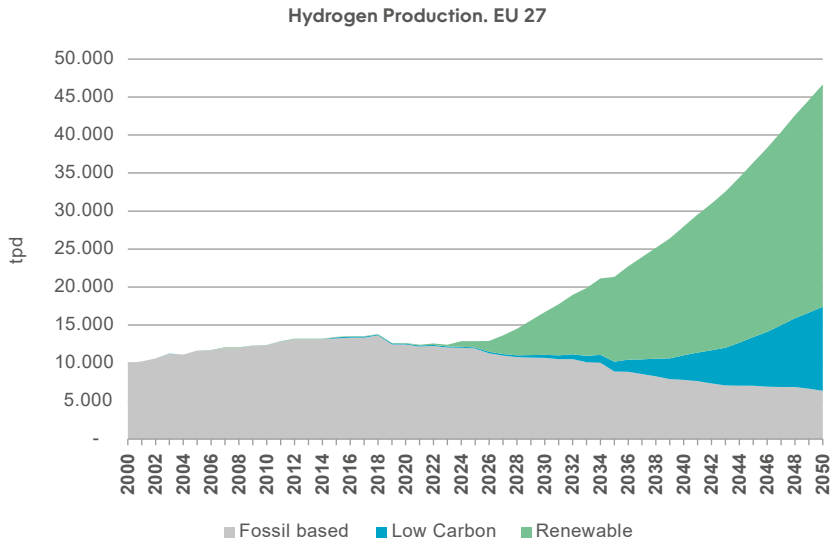


Source: gasworld Business Intelligence



# HYDROGEN PRODUCTION WILL SWING FROM FOSSIL BASED TO RENEWABLE

Aiming for Net Zero by 2050 – Europe will invest in alternative and cleaner hydrogen production methods over the next 3 decades.



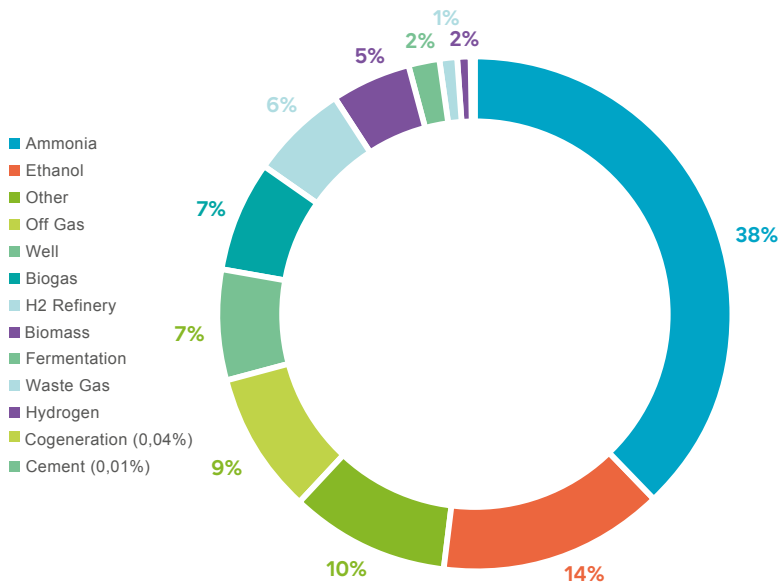
Source: Hydrogen Council McKinsey Report



## SOURCING OF QUALITY CO<sub>2</sub> IS A GROWING ISSUE

There is a demand for over 3 million tons of CO<sub>2</sub> in many different applications across the EU. While there is an apparent over-capacity the demand at peak times and reliance on ammonia has resulted in tight supply markets. Ammonia still appears to be the major source of CO<sub>2</sub> in Europe. Share of Ethanol/bioethanol plants are growing.

EU27 Product Capture Technology 2025



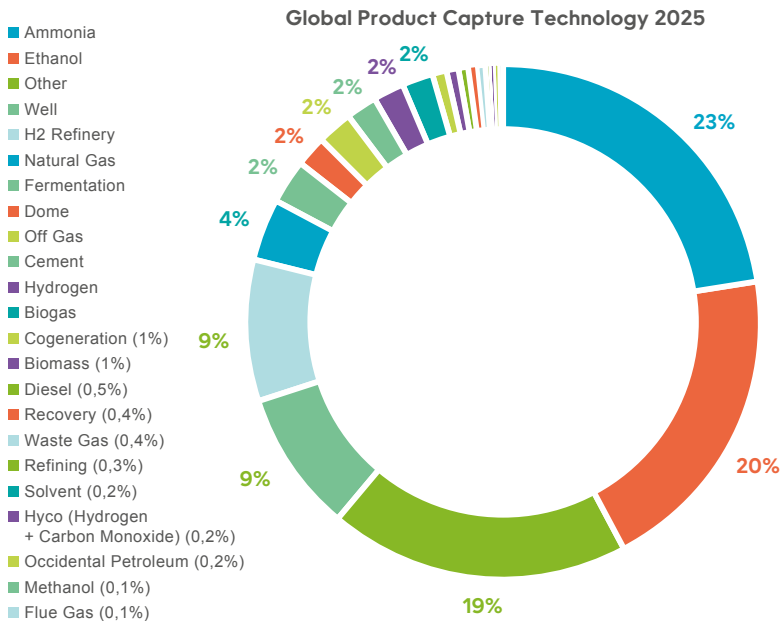
Source: gasworld Business Intelligence



# DISTRIBUTION OF GLOBAL PRODUCT CAPTURE TECHNOLOGIES IN 2025

The figure illustrates the breakdown of global product capture by technology in 2025, showing the respective shares of the different capture solutions.

Ammonia accounts for the largest share of captured products, reflecting its large-scale existing production, mature technologies and established downstream markets compared to other capture options.



Source: gasworld Business Intelligence



# Energy

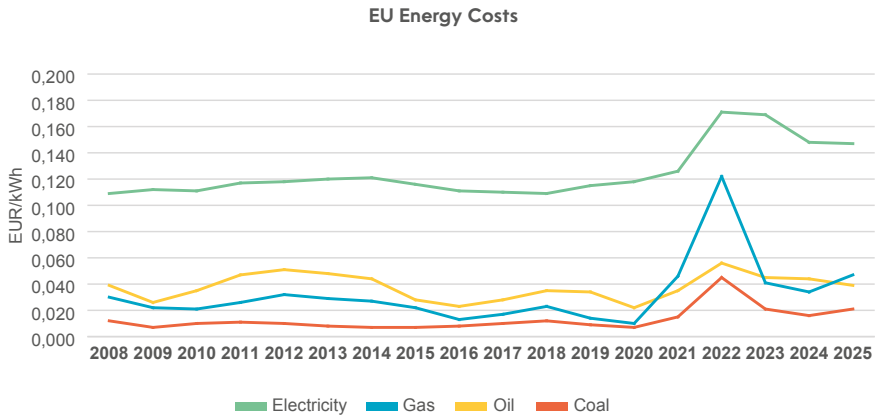






# THE IG INDUSTRY IS ENERGY INTENSIVE

Higher energy costs are impacting the industrial gases sector within the EU.



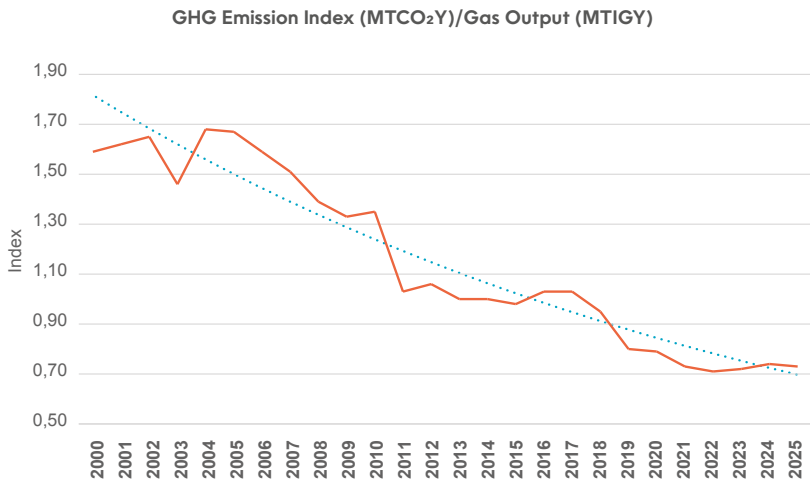
Note: The natural gas, electricity and oil prices are for Europe, but the coal prices are global.

Source: gasworld Business Intelligence, based on Eurostat data and commodity trade prices



# LOWERING OUR CARBON FOOTPRINT

Likewise, our industry is increasing efforts to lower their own carbon footprint – cutting emissions since 2000 with the further with a downward trend.



Note: Emissions reported for Air Liquide, Air Products, Linde and Nippon Gases. Missing data were estimated

Source: Company Reports/gasworld Business Intelligence estimates



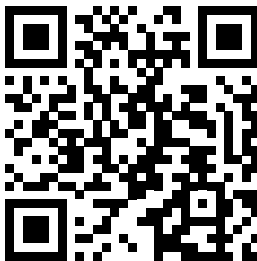
# Our Members

- AIR LIQUIDE
- AIR PRODUCTS
- BARIT MADEN TÜRK A.S.
- BUSE GAS B.V.
- BUZWAIR INDUSTRIAL GASES FACTORIES
- CARBO KOHLENSÄUREWERK HANNOVER GmbH
- FREYCO KOHLENSÄURE SERVICE GmbH & Co.KG
- GAS TECNICI FOLIGNO SRL
- HABAS Sınai Ve Tibbi Gazlar İst. End. AS
- IJSFABRIEK STROMBEEK NV
- IRISH OXYGEN COMPANY LTD
- LINDE
- MAXIMA – AIR SEPARATION CENTER Ltd
- MESSER
- MULTIGAS Ltd.
- NIPPON SANZO
- OY WOIKOSKI AB
- SAPPPIO
- SHELL GLOBAL SOLUTIONS INTERNATIONAL B.V.
- SIAD
- SN SEIXAL – SIDERURGIA NACIONAL S.A.
- SOL
- STRANDMÖLLEN A/S
- TYCZKA AIR AUSTRIA GMBH
- UAB GASHEMA
- WESTFALEN AG

- ASIA INDUSTRIAL GASES ASSOCIATION (AIGA)
- AUSTRALIA NEW ZEALAND INDUSTRIAL GAS ASSOCIATION (ANZIGA)
- Austria – ÖIGV
- Belgium – BELGIAN INDUSTRIAL & MEDICAL GASES ASSOCIATION – c/o ESSENCIA ASBL
- Bulgaria -BULGARIAN INDUSTRIAL GASES ASSOCIATION c/o SIAD BULGARIA EOOD
- COMPRESSED GAS ASSOCIATION, INC. (CGA)
- Czech Rep. – CATP
- Denmark – PCG – c/o STRANDMÖLLEN A/S
- Finland – FINNISH INDUSTRIAL GASES INDUSTRY – c/o OY LINDE GAS AB
- France – AFGC
- Germany – IGV
- Greece – HELLENIC ASSOCIATION OF INDUSTRIAL AND MEDICAL GASES (HAIMG)
- Hungary – MIGSZ (Hungarian Industrial Gases Association)
- INTERNATIONAL OXYGEN MANUFACTURERS ASSOCIATION, Inc. (IOMA)
- Italy – ASSOGASTECNICI
- JAPAN INDUSTRIAL AND MEDICAL GASES ASSOCIATION (JIMGA)
- Latvia – LATVIAN INDUSTRIAL GAS ASSOCIATION (LIGA) – Division of LAKIFA (Assoc of Latvian Chemical and Pharmaceutical Industry)
- MIDDLE EAST GASES ASSOCIATION (MEGA)
- Norway – NORSK INDUSTRIGASS FORENING (NIGF) c/o LINDE GAS AS
- Poland – PFGT (Polska Fundacja Gazów Technicznych)
- Portugal – APQUÍMICA – Associação Portuguesa da Química, Petroquímica e Refinação
- Romania – INDUSTRIAL GAS ASSOCIATION OF ROMANIA (IGAR)
- Slovakia – SAVDTP – c/o Messer Tatragas
- Slovenia – GIZ TP c/o MESSER SLOVENIJA d.o.o.
- South Africa – SOUTHERN AFRICA COMPRESSED GASES ASSOCIATION
- Spain – AFGIM – ASOCIACIÓN DE FABRICANTES DE GASES INDUSTRIALES Y MEDICINALES
- Sweden – SVENSKA INDUSTRIGASFÖRENINGEN (SIGA)
- Switzerland – IGS – Industriegaseverband Schweiz
- The Netherlands – VFIG
- United Kingdom – BCGA







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