

Global Air Separation Plant Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Air Separation Plant competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. An Air Separation Plant is a large-scale industrial facility designed to extract and purify components of atmospheric air—primarily oxygen (O₂), nitrogen (N₂), and argon (Ar)—using physical separation techniques. Air Separation Plants are essential for operations in steel manufacturing, chemicals, healthcare, electronics, oil and gas, food processing, and energy sectors. The market is primarily driven by increasing demand for industrial gases in both mature and emerging economies. Oxygen, for example, is critical in steel production and medical applications, while nitrogen is extensively used for inerting, purging, and packaging in the food and electronics industries. The cryogenic air separation process is the most widely adopted technology, offering high-purity gas output and economies of scale, especially for large industrial operations. However, alternative methods like Pressure Swing Adsorption (PSA) and membrane separation are also gaining traction, particularly for smaller-scale or on-site gas generation needs where cost, speed, and flexibility are priorities. Innovations in plant automation, digital monitoring, and energy efficiency are further enhancing operational performance and reducing lifecycle costs, making modern ASPs more sustainable and reliable. Geographically, Asia-Pacific dominates the air separation plant market, with China and India leading due to rapid industrialization, urban growth, and increased investments in infrastructure and manufacturing. The rise of the healthcare and energy sectors in these regions has also contributed to a surge in demand for medical oxygen and high-purity gases. North America and Europe remain key markets as well, driven by technological advancements, strict environmental regulations, and a focus on decarbonization across heavy industries. Despite positive growth prospects, the market

also faces challenges including high capital investment, long project lead times, and energy-intensive operations. Environmental concerns are prompting manufacturers to focus on low-carbon design, renewable-powered ASPs, and improved gas recovery systems. Partnerships, mergers, and long-term gas supply agreements are also common strategies among major players like Linde plc, Air Liquide, Air Products and Chemicals, Inc., and Taiyo Nippon Sanso to expand capacity and serve large industrial clients globally.

The global Air Separation Plant market size was estimated at USD 4736.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Air Separation Plant market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Air Separation Plant market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Air Separation Plant market.

Global Air Separation Plant Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Linde
Air Liquide
Hangyang Group
Sichuan Air Separation
Air Products
HNEC
Taiyo Nippon Sanso
Messer
Cryogenmash
AMCS
Air Water Plant & Engineering

Market Segmentation (by Type)

Below 20 K CMPH
20-60 K CMPH
Above 60 K CMPH

Market Segmentation (by Application)

Chemical
Industry Gas
Metallurgy Industry
Others

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Air Separation Plant Market
Overview of the regional outlook of the Air Separation Plant Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Air Separation Plant Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Air Separation Plant, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change
This enables you to anticipate market changes to remain ahead of your competitors
You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents
The concise analysis, clear graph, and table format will enable you to pinpoint the

information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

1.1 Market Definition and Statistical Scope of Air Separation Plant

1.2 Key Market Segments

1.2.1 Air Separation Plant Segment by Type

1.2.2 Air Separation Plant Segment by Application

1.3 Methodology & Sources of Information

1.3.1 Research Methodology

1.3.2 Research Process

1.3.3 Market Breakdown and Data Triangulation

1.3.4 Base Year

1.3.5 Report Assumptions & Caveats

2 AIR SEPARATION PLANT MARKET OVERVIEW

2.1 Global Market Overview

2.1.1 Global Air Separation Plant Market Size (M USD) Estimates and Forecasts (2020-2035)

2.1.2 Global Air Separation Plant Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 AIR SEPARATION PLANT MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global Air Separation Plant Product Life Cycle

3.3 Global Air Separation Plant Sales by Manufacturers (2020-2025)

3.4 Global Air Separation Plant Revenue Market Share by Manufacturers (2020-2025)

3.5 Air Separation Plant Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global Air Separation Plant Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 Air Separation Plant Market Competitive Situation and Trends

3.8.1 Air Separation Plant Market Concentration Rate

3.8.2 Global 5 and 10 Largest Air Separation Plant Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 AIR SEPARATION PLANT INDUSTRY CHAIN ANALYSIS

- 4.1 Air Separation Plant Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF AIR SEPARATION PLANT MARKET

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
 - 5.4.1 New Product Developments
 - 5.4.2 Mergers & Acquisitions
 - 5.4.3 Expansions
 - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
 - 5.5.1 Industry Policies Analysis
 - 5.5.2 Economic Environment Analysis
 - 5.5.3 Social Environment Analysis
 - 5.5.4 Technological Environment Analysis
- 5.6 Global Air Separation Plant Market Porter's Five Forces Analysis
 - 5.6.1 Global Trade Frictions
 - 5.6.2 U.S. Tariff Policy ? April 2025
 - 5.6.3 Global Trade Frictions and Their Impacts to Air Separation Plant Market
- 5.7 ESG Ratings of Leading Companies

6 AIR SEPARATION PLANT MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Air Separation Plant Sales Market Share by Type (2020-2025)
- 6.3 Global Air Separation Plant Market Size by Type (2020-2025)
- 6.4 Global Air Separation Plant Price by Type (2020-2025)

7 AIR SEPARATION PLANT MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Air Separation Plant Market Sales by Application (2020-2025)
- 7.3 Global Air Separation Plant Market Size (M USD) by Application (2020-2025)

7.4 Global Air Separation Plant Sales Growth Rate by Application (2020-2025)

8 AIR SEPARATION PLANT MARKET SALES BY REGION

8.1 Global Air Separation Plant Sales by Region

8.1.1 Global Air Separation Plant Sales by Region

8.1.2 Global Air Separation Plant Sales Market Share by Region

8.2 Global Air Separation Plant Market Size by Region

8.2.1 Global Air Separation Plant Market Size by Region

8.2.2 Global Air Separation Plant Market Size by Region

8.3 North America

8.3.1 North America Air Separation Plant Sales by Country

8.3.2 North America Air Separation Plant Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Air Separation Plant Sales by Country

8.4.2 Europe Air Separation Plant Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific Air Separation Plant Sales by Region

8.5.2 Asia Pacific Air Separation Plant Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

8.5.5 South Korea Market Overview

8.5.6 India Market Overview

8.5.7 Southeast Asia Market Overview

8.6 South America

8.6.1 South America Air Separation Plant Sales by Country

8.6.2 South America Air Separation Plant Market Size by Country

8.6.3 Brazil Market Overview

8.6.4 Argentina Market Overview

8.6.5 Columbia Market Overview

8.7 Middle East and Africa

- 8.7.1 Middle East and Africa Air Separation Plant Sales by Region
- 8.7.2 Middle East and Africa Air Separation Plant Market Size by Region
- 8.7.3 Saudi Arabia Market Overview
- 8.7.4 UAE Market Overview
- 8.7.5 Egypt Market Overview
- 8.7.6 Nigeria Market Overview
- 8.7.7 South Africa Market Overview

9 AIR SEPARATION PLANT MARKET PRODUCTION BY REGION

- 9.1 Global Production of Air Separation Plant by Region(2020-2025)
- 9.2 Global Air Separation Plant Revenue Market Share by Region (2020-2025)
- 9.3 Global Air Separation Plant Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Air Separation Plant Production
 - 9.4.1 North America Air Separation Plant Production Growth Rate (2020-2025)
 - 9.4.2 North America Air Separation Plant Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Air Separation Plant Production
 - 9.5.1 Europe Air Separation Plant Production Growth Rate (2020-2025)
 - 9.5.2 Europe Air Separation Plant Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Air Separation Plant Production (2020-2025)
 - 9.6.1 Japan Air Separation Plant Production Growth Rate (2020-2025)
 - 9.6.2 Japan Air Separation Plant Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Air Separation Plant Production (2020-2025)
 - 9.7.1 China Air Separation Plant Production Growth Rate (2020-2025)
 - 9.7.2 China Air Separation Plant Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

- 10.1 Linde
 - 10.1.1 Linde Basic Information
 - 10.1.2 Linde Air Separation Plant Product Overview
 - 10.1.3 Linde Air Separation Plant Product Market Performance
 - 10.1.4 Linde Business Overview
 - 10.1.5 Linde SWOT Analysis

- 10.1.6 Linde Recent Developments
- 10.2 Air Liquide
 - 10.2.1 Air Liquide Basic Information
 - 10.2.2 Air Liquide Air Separation Plant Product Overview
 - 10.2.3 Air Liquide Air Separation Plant Product Market Performance
 - 10.2.4 Air Liquide Business Overview
 - 10.2.5 Air Liquide SWOT Analysis
 - 10.2.6 Air Liquide Recent Developments
- 10.3 Hangyang Group
 - 10.3.1 Hangyang Group Basic Information
 - 10.3.2 Hangyang Group Air Separation Plant Product Overview
 - 10.3.3 Hangyang Group Air Separation Plant Product Market Performance
 - 10.3.4 Hangyang Group Business Overview
 - 10.3.5 Hangyang Group SWOT Analysis
 - 10.3.6 Hangyang Group Recent Developments
- 10.4 Sichuan Air Separation
 - 10.4.1 Sichuan Air Separation Basic Information
 - 10.4.2 Sichuan Air Separation Air Separation Plant Product Overview
 - 10.4.3 Sichuan Air Separation Air Separation Plant Product Market Performance
 - 10.4.4 Sichuan Air Separation Business Overview
 - 10.4.5 Sichuan Air Separation Recent Developments
- 10.5 Air Products
 - 10.5.1 Air Products Basic Information
 - 10.5.2 Air Products Air Separation Plant Product Overview
 - 10.5.3 Air Products Air Separation Plant Product Market Performance
 - 10.5.4 Air Products Business Overview
 - 10.5.5 Air Products Recent Developments
- 10.6 HNEC
 - 10.6.1 HNEC Basic Information
 - 10.6.2 HNEC Air Separation Plant Product Overview
 - 10.6.3 HNEC Air Separation Plant Product Market Performance
 - 10.6.4 HNEC Business Overview
 - 10.6.5 HNEC Recent Developments
- 10.7 Taiyo Nippon Sanso
 - 10.7.1 Taiyo Nippon Sanso Basic Information
 - 10.7.2 Taiyo Nippon Sanso Air Separation Plant Product Overview
 - 10.7.3 Taiyo Nippon Sanso Air Separation Plant Product Market Performance
 - 10.7.4 Taiyo Nippon Sanso Business Overview
 - 10.7.5 Taiyo Nippon Sanso Recent Developments

10.8 Messer

10.8.1 Messer Basic Information

10.8.2 Messer Air Separation Plant Product Overview

10.8.3 Messer Air Separation Plant Product Market Performance

10.8.4 Messer Business Overview

10.8.5 Messer Recent Developments

10.9 Cryogenmash

10.9.1 Cryogenmash Basic Information

10.9.2 Cryogenmash Air Separation Plant Product Overview

10.9.3 Cryogenmash Air Separation Plant Product Market Performance

10.9.4 Cryogenmash Business Overview

10.9.5 Cryogenmash Recent Developments

10.10 AMCS

10.10.1 AMCS Basic Information

10.10.2 AMCS Air Separation Plant Product Overview

10.10.3 AMCS Air Separation Plant Product Market Performance

10.10.4 AMCS Business Overview

10.10.5 AMCS Recent Developments

10.11 Air Water Plant and Engineering

10.11.1 Air Water Plant and Engineering Basic Information

10.11.2 Air Water Plant and Engineering Air Separation Plant Product Overview

10.11.3 Air Water Plant and Engineering Air Separation Plant Product Market

Performance

10.11.4 Air Water Plant and Engineering Business Overview

10.11.5 Air Water Plant and Engineering Recent Developments

11 AIR SEPARATION PLANT MARKET FORECAST BY REGION

11.1 Global Air Separation Plant Market Size Forecast

11.2 Global Air Separation Plant Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Air Separation Plant Market Size Forecast by Country

11.2.3 Asia Pacific Air Separation Plant Market Size Forecast by Region

11.2.4 South America Air Separation Plant Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Air Separation Plant by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Air Separation Plant Market Forecast by Type (2026-2035)

- 12.1.1 Global Forecasted Sales of Air Separation Plant by Type (2026-2035)
- 12.1.2 Global Air Separation Plant Market Size Forecast by Type (2026-2035)
- 12.1.3 Global Forecasted Price of Air Separation Plant by Type (2026-2035)
- 12.2 Global Air Separation Plant Market Forecast by Application (2026-2035)
 - 12.2.1 Global Air Separation Plant Sales (K Units) Forecast by Application
 - 12.2.2 Global Air Separation Plant Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type
Table 2. Introduction of the Application
Table 3. Global Air Separation Plant Market Size by Type (M USD)
Table 4. Global Air Separation Plant Market Size by Application
Table 5. Air Separation Plant Market Size Comparison by Region (M USD)
Table 6. Global Air Separation Plant Sales (K Units) by Manufacturers (2020-2025)
Table 7. Global Air Separation Plant Sales Market Share by Manufacturers (2020-2025)
Table 8. Global Air Separation Plant Revenue (M USD) by Manufacturers (2020-2025)
Table 9. Global Air Separation Plant Revenue Share by Manufacturers (2020-2025)
Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Air Separation Plant as of 2025)
Table 11. Global Market Air Separation Plant Average Price (USD/Unit) of Key Manufacturers (2020-2025)
Table 12. Manufacturers? Manufacturing Sites, Areas Served
Table 13. Manufacturers? Product Type
Table 14. Global Air Separation Plant Manufacturers Market Concentration Ratio (CR5 and HHI)
Table 15. Mergers & Acquisitions, Expansion Plans
Table 16. Market Overview of Key Raw Materials
Table 17. Midstream Market Analysis
Table 18. Downstream Customer Analysis
Table 19. Key Development Trends
Table 20. Driving Factors
Table 21. Air Separation Plant Market Challenges
Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
Table 26. Global Air Separation Plant Sales by Type (K Units)
Table 27. Global Air Separation Plant Market Size by Type (M USD)
Table 28. Global Air Separation Plant Sales (K Units) by Type (2020-2025)
Table 29. Global Air Separation Plant Sales Market Share by Type (2020-2025)
Table 30. Global Air Separation Plant Market Size (M USD) by Type (2020-2025)
Table 31. Global Air Separation Plant Market Share by Type (2020-2025)

Table 32. Global Air Separation Plant Price (USD/Unit) by Type (2020-2025)
Table 33. Global Air Separation Plant Sales (K Units) by Application
Table 34. Global Air Separation Plant Market Size by Application
Table 35. Global Air Separation Plant Sales by Application (2020-2025) & (K Units)
Table 36. Global Air Separation Plant Sales Market Share by Application (2020-2025)
Table 37. Global Air Separation Plant Market Size by Application (2020-2025) & (M USD)
Table 38. Global Air Separation Plant Market Share by Application (2020-2025)
Table 39. Global Air Separation Plant Sales Growth Rate by Application (2020-2025)
Table 40. Global Air Separation Plant Sales by Region (2020-2025) & (K Units)
Table 41. Global Air Separation Plant Sales Market Share by Region (2020-2025)
Table 42. Global Air Separation Plant Market Size by Region (2020-2025) & (M USD)
Table 43. Global Air Separation Plant Market Size by Region (2020-2025)
Table 44. North America Air Separation Plant Sales by Country (2020-2025) & (K Units)
Table 45. North America Air Separation Plant Market Size by Country (2020-2025) & (M USD)
Table 46. Europe Air Separation Plant Sales by Country (2020-2025) & (K Units)
Table 47. Europe Air Separation Plant Market Size by Country (2020-2025) & (M USD)
Table 48. Asia Pacific Air Separation Plant Sales by Region (2020-2025) & (K Units)
Table 49. Asia Pacific Air Separation Plant Market Size by Region (2020-2025) & (M USD)
Table 50. South America Air Separation Plant Sales by Country (2020-2025) & (K Units)
Table 51. South America Air Separation Plant Market Size by Country (2020-2025) & (M USD)
Table 52. Middle East and Africa Air Separation Plant Sales by Region (2020-2025) & (K Units)
Table 53. Middle East and Africa Air Separation Plant Market Size by Region (2020-2025) & (M USD)
Table 54. Global Air Separation Plant Production (K Units) by Region(2020-2025)
Table 55. Global Air Separation Plant Revenue (US\$ Million) by Region (2020-2025)
Table 56. Global Air Separation Plant Revenue Market Share by Region (2020-2025)
Table 57. Global Air Separation Plant Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 58. North America Air Separation Plant Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 59. Europe Air Separation Plant Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 60. Japan Air Separation Plant Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Air Separation Plant Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. Linde Basic Information

Table 63. Linde Air Separation Plant Product Overview

Table 64. Linde Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. Linde Business Overview

Table 66. Linde SWOT Analysis

Table 67. Linde Recent Developments

Table 68. Air Liquide Basic Information

Table 69. Air Liquide Air Separation Plant Product Overview

Table 70. Air Liquide Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. Air Liquide Business Overview

Table 72. Air Liquide SWOT Analysis

Table 73. Air Liquide Recent Developments

Table 74. Hangyang Group Basic Information

Table 75. Hangyang Group Air Separation Plant Product Overview

Table 76. Hangyang Group Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. Hangyang Group Business Overview

Table 78. Hangyang Group SWOT Analysis

Table 79. Hangyang Group Recent Developments

Table 80. Sichuan Air Separation Basic Information

Table 81. Sichuan Air Separation Air Separation Plant Product Overview

Table 82. Sichuan Air Separation Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Sichuan Air Separation Business Overview

Table 84. Sichuan Air Separation Recent Developments

Table 85. Air Products Basic Information

Table 86. Air Products Air Separation Plant Product Overview

Table 87. Air Products Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. Air Products Business Overview

Table 89. Air Products Recent Developments

Table 90. HNEC Basic Information

Table 91. HNEC Air Separation Plant Product Overview

Table 92. HNEC Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. HNEC Business Overview
Table 94. HNEC Recent Developments
Table 95. Taiyo Nippon Sanso Basic Information
Table 96. Taiyo Nippon Sanso Air Separation Plant Product Overview
Table 97. Taiyo Nippon Sanso Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 98. Taiyo Nippon Sanso Business Overview
Table 99. Taiyo Nippon Sanso Recent Developments
Table 100. Messer Basic Information
Table 101. Messer Air Separation Plant Product Overview
Table 102. Messer Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 103. Messer Business Overview
Table 104. Messer Recent Developments
Table 105. Cryogenmash Basic Information
Table 106. Cryogenmash Air Separation Plant Product Overview
Table 107. Cryogenmash Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 108. Cryogenmash Business Overview
Table 109. Cryogenmash Recent Developments
Table 110. AMCS Basic Information
Table 111. AMCS Air Separation Plant Product Overview
Table 112. AMCS Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 113. AMCS Business Overview
Table 114. AMCS Recent Developments
Table 115. Air Water Plant and Engineering Basic Information
Table 116. Air Water Plant and Engineering Air Separation Plant Product Overview
Table 117. Air Water Plant and Engineering Air Separation Plant Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 118. Air Water Plant and Engineering Business Overview
Table 119. Air Water Plant and Engineering Recent Developments
Table 120. Global Air Separation Plant Sales Forecast by Region (2026-2035) & (K Units)
Table 121. Global Air Separation Plant Market Size Forecast by Region (2026-2035) & (M USD)
Table 122. North America Air Separation Plant Sales Forecast by Country (2026-2035) & (K Units)
Table 123. North America Air Separation Plant Market Size Forecast by Country

(2026-2035) & (M USD)

Table 124. Europe Air Separation Plant Sales Forecast by Country (2026-2035) & (K Units)

Table 125. Europe Air Separation Plant Market Size Forecast by Country (2026-2035) & (M USD)

Table 126. Asia Pacific Air Separation Plant Sales Forecast by Region (2026-2035) & (K Units)

Table 127. Asia Pacific Air Separation Plant Market Size Forecast by Region (2026-2035) & (M USD)

Table 128. South America Air Separation Plant Sales Forecast by Country (2026-2035) & (K Units)

Table 129. South America Air Separation Plant Market Size Forecast by Country (2026-2035) & (M USD)

Table 130. Middle East and Africa Air Separation Plant Sales Forecast by Country (2026-2035) & (Units)

Table 131. Middle East and Africa Air Separation Plant Market Size Forecast by Country (2026-2035) & (M USD)

Table 132. Global Air Separation Plant Sales Forecast by Type (2026-2035) & (K Units)

Table 133. Global Air Separation Plant Market Size Forecast by Type (2026-2035) & (M USD)

Table 134. Global Air Separation Plant Price Forecast by Type (2026-2035) & (USD/Unit)

Table 135. Global Air Separation Plant Sales (K Units) Forecast by Application (2026-2035)

Table 136. Global Air Separation Plant Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

Figure 1. Product Picture of Air Separation Plant

Figure 2. Data Triangulation

Figure 3. Key Caveats

Figure 4. Global Air Separation Plant Market Size (M USD), 2025-2035

Figure 5. Global Air Separation Plant Market Size (M USD) (2020-2035)

Figure 6. Global Air Separation Plant Sales (K Units) & (2020-2035)

Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)

Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 9. Evaluation Matrix of Regional Market Development Potential

Figure 10. Air Separation Plant Market Size by Country (M USD)

Figure 11. Company Assessment Quadrant

Figure 12. Global Air Separation Plant Product Life Cycle

Figure 13. Air Separation Plant Sales Share by Manufacturers in 2025

Figure 14. Global Air Separation Plant Revenue Share by Manufacturers in 2025

Figure 15. Air Separation Plant Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025

Figure 16. Global Market Air Separation Plant Average Price (USD/Unit) of Key Manufacturers in 2025

Figure 17. The Global 5 and 10 Largest Players: Market Share by Air Separation Plant Revenue in 2025

Figure 18. Industry Chain Map of Air Separation Plant

Figure 19. Global Air Separation Plant Market PEST Analysis

Figure 20. Global Air Separation Plant Market Porter's Five Forces Analysis

Figure 21. Global Merchandise Trade as a Percentage Of GDP

Figure 22. US - Imports of Goods by Country

Figure 23. China Exports by Country

Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers

Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)

Figure 26. Global Air Separation Plant Market Share by Type

Figure 27. Sales Market Share of Air Separation Plant by Type (2020-2025)

Figure 28. Sales Market Share of Air Separation Plant by Type in 2025

Figure 29. Market Share of Air Separation Plant by Type (2020-2025)

Figure 30. Market Share of Air Separation Plant by Type in 2025

Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Air Separation Plant Market Share by Application

- Figure 33. Global Air Separation Plant Sales Market Share by Application (2020-2025)
- Figure 34. Global Air Separation Plant Sales Market Share by Application in 2025
- Figure 35. Global Air Separation Plant Market Share by Application (2020-2025)
- Figure 36. Global Air Separation Plant Market Share by Application in 2025
- Figure 37. Global Air Separation Plant Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Air Separation Plant Sales Market Share by Region (2020-2025)
- Figure 39. Global Air Separation Plant Market Size by Region (2020-2025)
- Figure 40. North America Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Air Separation Plant Sales Market Share by Country in 2024
- Figure 43. North America Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Air Separation Plant Market Size by Country in 2024
- Figure 45. U.S. Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Air Separation Plant Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Air Separation Plant Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Air Separation Plant Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Air Separation Plant Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 52. Europe Air Separation Plant Sales Market Share by Country in 2024
- Figure 53. Europe Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 54. Europe Air Separation Plant Market Size by Country in 2024
- Figure 55. Germany Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 56. Germany Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 57. France Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 58. France Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 59. U.K. Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)
- Figure 60. U.K. Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Air Separation Plant Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Air Separation Plant Sales Market Share by Region in 2024

Figure 67. Asia Pacific Air Separation Plant Market Size by Region in 2024

Figure 68. China Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Air Separation Plant Sales and Growth Rate (K Units)

Figure 79. South America Air Separation Plant Sales Market Share by Country in 2024

Figure 80. South America Air Separation Plant Market Size and Growth Rate (M USD)

Figure 81. South America Air Separation Plant Market Size by Country in 2024

Figure 82. Brazil Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Air Separation Plant Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Air Separation Plant Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Air Separation Plant Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Air Separation Plant Market Size by Region in 2024

Figure 92. Saudi Arabia Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Air Separation Plant Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Air Separation Plant Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Air Separation Plant Production Market Share by Region (2020-2025)

Figure 103. North America Air Separation Plant Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Air Separation Plant Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Air Separation Plant Production (K Units) Growth Rate (2020-2025)

Figure 106. China Air Separation Plant Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Air Separation Plant Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Air Separation Plant Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Air Separation Plant Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Air Separation Plant Market Share Forecast by Type (2026-2035)

Figure 111. Global Air Separation Plant Sales Forecast by Application (2026-2035)

Figure 112. Global Air Separation Plant Market Share Forecast by Application
(2026-2035)

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