

Global Polymeric Membrane Market: Analysis By Technology (Reverse Osmosis (RO), Ultrafiltration (UF), Microfiltration (MF) And Nanofiltration (NF)), By End Sector (Water Treatment Polymeric Membrane, Wastewater Treatment Polymeric Membrane, Medical Polymeric Membrane And Industrial Polymeric Membrane), By Region Size And Trends With Impact Of COVID-19 And Forecast Up To 2028

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Abstracts

The global polymeric membrane market in 2022 was valued at US\$7.44 billion. The market value is projected to reach US\$9.47 billion by 2028. Polymeric membrane refers to a collection of polymers with improved and more efficient mechanical properties for membrane filtration. Polymeric membrane has high performance, efficiency, and particular separation properties. They are cost-effective, have high selectivity, and are simple to prepare and operate in a variety of applications such as beverage processing, feed water generation, chemical processing, and others.

The market value is expected to grow at a CAGR of 4.09% during the forecast period of 2023-2028, with water treatment polymeric membrane segment being the dominant end sector owing to rising population and water pollution. Ensuring adequate clean water supplies for ever growing population will likely require increased investment in water processing technology. Additionally, the increasing presence of emerging pollutants in the aquatic environment is leading the market to find innovative technologies to purify water. Furthermore, in regions with water scarcity, the provision of water from seawater desalination plants is becoming increasingly important, which is expected to propel the reverse osmosis technology in the polymeric membrane market during the forecast

period.

Market Segmentation Analysis:

By Technology: The report provides the bifurcation of the market into four segments based on the technology: reverse osmosis, ultrafiltration, microfiltration and nanofiltration. In 2022, in terms of value, reverse osmosis polymeric membrane segment held the major share in the market. Reverse osmosis is largely used for the desalination of seawater as it can separate dissolved solids, bacteria, viruses, and other selected dissolved substances. Considering the rising trend of reverse osmosis membrane use in alternative water source treatment, including desalination plants and wastewater recycling, the reverse osmosis membrane-based water and wastewater treatment processes are expected to have a great potential in the future.

By End Sector: The report provides the bifurcation of the market into four segments based on the end sector: water treatment, wastewater treatment, medical polymeric membrane and industrial polymeric membrane. In 2022, water treatment held the major share in the market, followed by wastewater treatment. The survival of human life depends on the availability of freshwater for drinking. Owing to urbanization stemming from the rising global population, the demand for water purification system has increased over years. These water purifying systems largely use polymeric membrane to carry out the filtration process. Besides, the global commitment to reducing plastic consumption and increasing number of desalination projects to bring clean water to rural areas and emerging countries using affordable and safe filtration systems is expected to drive the demand for polymeric membrane during the forecasted years.

Market Dynamics:

Growth Drivers: One of the most important factors impacting the global polymeric membrane market is the rapid increase in population. Rapidly growing population require increased water availability for consumption. Due to rising water pollution, the freshwater has been depleting at a faster rate, thus making it necessary to reuse the water. The impact of climate change, combined with rapid population growth and industrialization, is likely to require continued investment in drinking and wastewater infrastructure across the continent which require polymeric membrane for filtration. This is expected to drive the demand for polymeric membrane during forecasted years. In addition to this, the market has been growing over the past few years, due to factors such as increasing need for water purification system, growing adoption in pharmaceutical industry, surging demand from food & beverage industry, stringent

wastewater regulations, escalating water pollution and many other factors.

Challenges: However, the market has been confronted with some challenges specifically, need for frequent replacements of barrier films, maintaining low cost of production, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as proliferation of blood transfusion and apheresis membrane, proton exchange and anion exchange membrane, water and wastewater treatment digitalization etc. The apheresis market extensively use polymeric membrane for blood and plasma collection and transfusion. Increasing number of blood diseases, such as sickle cell anaemia, blood cancer and haemophilia and the huge demand for plasmapheresis devices on the back of the increasing use of plasma-derived drugs by biopharma companies are expected to drive the demand for blood transfusion and apheresis membrane, thereby propelling the global polymeric membrane market.

Impact Analysis of COVID-19 and Way Forward:

The sudden outbreak of the COVID-19 pandemic has caused a significant strain on the growth of the global polymeric membrane market as a result of disruption in the supply and demand chain of raw materials for manufacturing such polymers. The lockdown shutdown almost all the major biopharmaceutical, food & beverage processing, water & wastewater treatment projects, and petrochemical processing activities across the world straining the productivity of the market.

Competitive Landscape:

The global polymeric membrane market is consolidated with the presence of concentrated large players. The key players in the global polymeric membrane market are:

Toray Industries, Inc.

Nitto Denko Corporation (Hydranautics)

Danaher Corporation (Pall Corporation)

Parker Hannifin Corporation

Pentair plc

Alsys Group

Membrane Technology & Research (MTR)

Arkema S.A

Evonik Industries AG

Honeywell International Inc.

Daikin Industries, Ltd

Solvay S.A.

LG Chem Ltd.

Globally there are only few manufacturers of hollow fibre membranes for third-parties and most of them focus on 'standard' membranes, such as those used in dialysis treatment. Several resin manufacturers, like DuPont, Saint Gobain and Solvay, as well as multinational MedTech companies, such as Asahi Kasei, Baxter and Fresenius Medical Care, also manufacture hollow fibre membranes but almost entirely for their own internal production, and do not sell them to third parties.

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