

Global Aircraft Onboard Oxygen Generation System Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G28F49E0B99CEN.html>

Date: June 2026

Pages: 132

Price: US\$ 4,480.00 (Single User License)

ID: G28F49E0B99CEN

Abstracts

The global Aircraft Onboard Oxygen Generation System market size is expected to reach \$ 1855 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

An aircraft onboard oxygen generation system refers to an oxygen supply and life support system installed on an aircraft. Its core function is to utilize engine bleed air or on-board compressed air during flight to separate nitrogen and other gases from the air?typically through methods such as molecular sieves and Pressure Swing Adsorption (PSA)?thereby continuously generating oxygen-enriched gas that meets the respiratory needs of pilots, flight crews, or passengers. Compared to traditional high-pressure oxygen cylinders or liquid oxygen systems, OBOGS eliminates the need for frequent ground-based oxygen replenishment, thereby alleviating logistical support burdens and enhancing flight endurance and mission sustainment capabilities. Consequently, these systems are widely deployed in military aircraft, high-altitude operation platforms, trainer aircraft, special mission aircraft, and other aviation platforms requiring continuous oxygen supply capabilities.

The upstream segment of the aircraft onboard oxygen generation system industry supply chain primarily encompasses molecular sieve materials, adsorption towers, compressed air/engine bleed air interfaces, filters, pressure regulators, flow control valves, oxygen concentration sensors, pressure sensors, controllers, tubing connectors, seals, electronic control modules, components related to the aircraft's Environmental Control System (ECS), as well as aviation-grade materials and components. The midstream segment consists of OBOGS R&D manufacturers responsible for the development and production of oxygen generation modules, pneumatic control modules, sensing and monitoring modules, control software, fault diagnostics, and the

verification of system airworthiness and compliance with military standards. The downstream segment primarily targets markets involving military fighter jets, trainer aircraft, transport aircraft, helicopters, special mission aircraft, high-altitude Unmanned Aerial Vehicles (UAVs), and aircraft maintenance and support services. This industry falls under the broader category of aviation life support and on-board environmental control systems; it is characterized by high technical and certification barriers, and its gross profit margins typically exceed those of general electromechanical equipment. Core components—such as molecular sieve assemblies, valves, sensors, and control modules—command gross margins of approximately 35% to 55%; complete OBOGS units typically yield gross margins of 30% to 50%, while systems designed for military aircraft, high-altitude platforms, or custom-configured OBOGS solutions can reach margins of 45% to 60%. Conversely, ancillary components—such as tubing, structural parts, and lower-end filters—typically yield gross margins ranging from 15% to 30%. Overall, the bulk of the industry's profits is concentrated in the areas of system design, oxygen concentration control, reliability verification, airworthiness certification, military standard compliance, and long-term maintenance and support services.

In 2025, the average price of aircraft onboard oxygen generation system is projected to be \$300 k per unit, with sales reaching 4,003 units and a total production capacity of 5,720 units.

The aircraft onboard oxygen generation system market is projected to maintain a trend of steady growth and continuous technological advancement in the future. The primary driving forces behind this trend stem from the demand for military aircraft, high-altitude unmanned aerial vehicles (UAVs), trainer aircraft, special mission aircraft, as well as the need to retrofit and upgrade aging oxygen systems. Compared to traditional high-pressure oxygen cylinders or liquid oxygen systems, OBOGS offers the distinct advantage of continuously generating oxygen-enriched gas during flight; this capability reduces the reliance on ground-based oxygen resupply logistics, lowers logistical complexity, and enhances operational endurance for long-duration missions—thereby demonstrating significant value in applications involving military aircraft and high-altitude platforms. Future product development efforts will focus primarily on areas such as high-reliability molecular sieve oxygen generation, real-time oxygen concentration monitoring, fault diagnosis, system miniaturization and lightweighting, low power consumption, enhanced resistance to vibration and high G-loads, and intelligent control capabilities. Concurrently, safety incidents related to oxygen supply will drive the industry to prioritize robust system redundancy designs, advanced sensor monitoring, and comprehensive system health management. Overall, the key barriers to entry within this industry lie in the rigorous verification of aviation-grade reliability, compliance with

military standards and airworthiness certifications, extensive experience in system integration, and the capability to provide long-term maintenance and support services; consequently, companies possessing proven expertise in life support systems?along with the requisite supplier qualifications to serve as Tier 1 partners for major aircraft manufacturers?are best positioned to gain a competitive advantage.

This report studies the global Aircraft Onboard Oxygen Generation System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aircraft Onboard Oxygen Generation System and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aircraft Onboard Oxygen Generation System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aircraft Onboard Oxygen Generation System total production and demand, 2021-2032, (Units)

Global Aircraft Onboard Oxygen Generation System total production value, 2021-2032, (USD Million)

Global Aircraft Onboard Oxygen Generation System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Aircraft Onboard Oxygen Generation System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Aircraft Onboard Oxygen Generation System domestic production, consumption, key domestic manufacturers and share

Global Aircraft Onboard Oxygen Generation System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Aircraft Onboard Oxygen Generation System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Aircraft Onboard Oxygen Generation System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Aircraft Onboard Oxygen Generation System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Air Liquide, Air

Squared, Honeywell Aerospace, Safran, Eaton, Cobham, Collins Aerospace, Tokyo Aircraft Instrument, Oxigraf, Parker Hannifin, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Aircraft Onboard Oxygen Generation System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aircraft Onboard Oxygen Generation System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Aircraft Onboard Oxygen Generation System Market, Segmentation by Type:

Medium Oxygen-Enriched Type (Oxygen Concentration: 40%-70%)

High Oxygen-Enriched Type (Oxygen Concentration: 70%-95%)

Global Aircraft Onboard Oxygen Generation System Market, Segmentation by Oxygen Generation Principle:

Molecular Sieve Adsorption Type

Membrane Separation Type

Global Aircraft Onboard Oxygen Generation System Market, Segmentation by Oxygen Recipients:

Single-User Oxygen Supply Type

Dual-User Oxygen Supply Type

Multi-User Oxygen Supply Type

Global Aircraft Onboard Oxygen Generation System Market, Segmentation by Application:

Military Aviation

Civil Aviation

Companies Profiled:

Air Liquide

Air Squared

Honeywell Aerospace

Safran

Eaton

Cobham

Collins Aerospace

Tokyo Aircraft Instrument

Oxigraf

Parker Hannifin

Linde

Diehl Aviation

Aerox Aviation Oxygen Systems

Jiangsu Hongbo Gas Equipment Technology Group

JAMCO

Key Questions Answered:

1. How big is the global Aircraft Onboard Oxygen Generation System market?
2. What is the demand of the global Aircraft Onboard Oxygen Generation System market?
3. What is the year over year growth of the global Aircraft Onboard Oxygen Generation System market?
4. What is the production and production value of the global Aircraft Onboard Oxygen Generation System market?
5. Who are the key producers in the global Aircraft Onboard Oxygen Generation System market?
6. What are the growth factors driving the market demand?

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