

Global CBRN Filter-Absorbers Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G903737B530DEN.html>

Date: August 2026

Pages: 145

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

ID: G903737B530DEN

Abstracts

The global CBRN Filter-Absorbers market size is expected to reach \$ 506 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

CBRN filter absorbers are physical filtration products used in collective nuclear, biological, and chemical protection systems. They are mainly installed in the intake air purification circuits of military vehicles, naval vessels, aviation platforms, mobile shelters, command posts, civil defense works, civilian shelters, hospital isolation spaces, and control rooms of critical infrastructure. The products typically consist of corrosion-resistant sealed housings, air inlet and outlet interfaces, prefiltration layers, high-efficiency particulate filtration layers, impregnated activated carbon adsorption layers, supporting mesh frames, sealing gaskets, and status identification components. They may be supplied in cylindrical, box-type, panel-type, radial-flow, and modular filter bank configurations.

The manufacturing process includes housing forming and anticorrosion treatment, filter paper pleating and encapsulation, activated carbon screening and impregnation modification, quantitative filling of adsorption media, structural compression, seal curing, airtightness inspection, resistance testing, particulate filtration efficiency testing, chemical agent simulant breakthrough testing, and environmental reliability verification. Key specifications generally include rated airflow, initial pressure drop, particulate filtration efficiency, chemical agent protection time, adsorption capacity, airtightness level, operating temperature, storage life, vibration resistance, and shock resistance.

Their core function is to remove radioactive dust, biological aerosols, toxic smoke, toxic mist, chemical warfare agent vapors, and certain toxic industrial chemicals from the air, while continuously supplying safe air to protected spaces in coordination with ventilation

and overpressure systems. These products focus on composite filter absorption units that can be sold and replaced independently and cover demand from initial installation, spare parts reserves, periodic maintenance, and end-of-life replacement. Based on comprehensive estimates, global sales of CBRN filter absorbers were approximately 41,000 units in 2025, with an industry average price of approximately USD 7,800 per unit and an industry average gross margin of approximately 25% to 35%.

The upstream segment of the CBRN filter absorber value chain mainly consists of high-efficiency glass fiber filter paper, synthetic fiber filtration media, impregnated activated carbon, metal or composite housings, sealing components, and chemical simulants used for testing. The midstream segment is responsible for filter media forming, adsorbent modification, quantitative filling, sealing and final assembly, and protection performance verification, while the downstream segment serves military vehicles, naval vessels, mobile shelters, civil defense works, civilian shelters, hospitals, and critical infrastructure. Industry value is concentrated primarily in adsorption formulations, composite filter layer design, reliability certification, and long-term storage capability rather than ordinary mechanical assembly.

The global supply landscape is characterized by parallel regional systems. European and North American companies have accumulated substantial experience in military platform integration, standards certification, and high-reliability composite filtration, while Europe's civil defense system also generates substantial maintenance demand from its large shelter base. China has developed two main supply systems covering military special protection equipment and civil defense engineering. Russia and other members of the Commonwealth of Independent States continue to follow independent product model and technical standards, while South Korea and the Middle East rely on a limited number of domestic protection companies to supplement regional supply. Because military market access, certification, and confidentiality requirements remain stringent, the regionalized nature of the supply chain is expected to persist over the long term.

Demand is centered on military vehicles, naval vessels, and mobile shelters, while civilian shelters, civil defense works, and fixed control rooms form a stable replacement market. Product development is shifting from protection against individual chemical agents toward broad-spectrum compatibility covering chemical warfare agents, biological aerosols, radioactive particulates, and toxic industrial chemicals. At the same time, products are being improved in terms of lower pressure drop, reduced size and weight, longer storage life, rapid replacement, and condition monitoring. New products place greater emphasis on modular interfaces, allowing the same filtration unit to be

adapted to different platforms while reducing lifecycle maintenance costs.

The policy environment is expanding CBRN protection from a specialized military capability into an important component of national resilience, civil preparedness, and critical infrastructure protection. Europe continues to strengthen shelter maintenance, strategic reserves, and cross-border emergency coordination, while several countries are increasing related capital expenditure. Industry consolidation is also promoting the integration of filtration materials, system integration capabilities, and global service networks. Future growth will continue to be driven mainly by replacement demand, platform upgrades, and regional security investment. Capacity expansion will focus more on certified production lines, testing laboratories, and localized delivery capabilities than on large-scale general-purpose manufacturing.

Report Scope

This report studies the global CBRN Filter-Absorbers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CBRN Filter-Absorbers 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 CBRN Filter-Absorbers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CBRN Filter-Absorbers total production and demand, 2021-2032, (Units)

Global CBRN Filter-Absorbers total production value, 2021-2032, (USD Million)

Global CBRN Filter-Absorbers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global CBRN Filter-Absorbers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: CBRN Filter-Absorbers domestic production, consumption, key domestic manufacturers and share

Global CBRN Filter-Absorbers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global CBRN Filter-Absorbers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global CBRN Filter-Absorbers production by Application, production, value, CAGR,

2021-2032, (USD Million) & (Units)

This report profiles key players in the global CBRN Filter-Absorbers 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 SG Safety Co., Ltd., Hancom Lifecare Inc., DOBU Life Tech Co., Ltd., Arconik, NERO Industries Defense Inc., BLADE, Design West Technologies, Inc., Beth-El Industries Ltd., MDH Defence Limited, EMCEL Filters Limited, 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 CBRN Filter-Absorbers 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 CBRN Filter-Absorbers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CBRN Filter-Absorbers Market, Segmentation by Type:

Cylindrical Canister Filter-Absorbers

Rectangular Cartridge Filter-Absorbers

Panel-Type Filter-Absorbers

Others

Global CBRN Filter-Absorbers Market, Segmentation by Rated Airflow Capacity:

Small Capacity Up to 150 m³/h

Medium Capacity Above 150 to 500 m³/h

Large Capacity Above 500 to 1,000 m³/h

Extra-Large Capacity Above 1,000 m³/h

Global CBRN Filter-Absorbers Market, Segmentation by Housing Material:

Carbon Steel Housing

Stainless Steel Housing

Aluminum Alloy Housing

Polymer or Composite Housing

Hybrid Housing

Others

Global CBRN Filter-Absorbers Market, Segmentation by Airflow Configuration:

Axial-Flow Filter-Absorbers

Radial-Flow Filter-Absorbers

Cross-Flow Filter-Absorbers

Others

Global CBRN Filter-Absorbers Market, Segmentation by Application:

Armored and Tactical Vehicles

Naval Vessels

Aircraft and Airborne Platforms

Deployable Shelters

Civil Defense Infrastructure

Critical Infrastructure

Others

Companies Profiled:

SG Safety Co., Ltd.

Hancom Lifecare Inc.

DOBU Life Tech Co., Ltd.

Arconik

NERO Industries Defense Inc.

BLADE

Design West Technologies, Inc.

Beth-El Industries Ltd.

MDH Defence Limited

EMCEL Filters Limited

Temet Group Oy

SP Defense

LUNOR G. Kull AG

etna GmbH

Zelinsky Group

SPECOBORONA

Hubei Huaqiang Technology Co., Ltd.

Shanxi Xinhua Fanghua Zhuangbei Yanjiuyuan Youxian Gongsi

Shandong Zhonghao Konggu Jituan Youxian Gongsi

Shandong Grad Group Co., Ltd.

Key Questions Answered:

1. How big is the global CBRN Filter-Absorbers market?
2. What is the demand of the global CBRN Filter-Absorbers market?
3. What is the year over year growth of the global CBRN Filter-Absorbers market?
4. What is the production and production value of the global CBRN Filter-Absorbers

market?

5. Who are the key producers in the global CBRN Filter-Absorbers market?

6. What are the growth factors driving the market demand?

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