

Global MABR Membrane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global MABR Membrane market size is expected to reach \$ 47.72 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

MABR membrane refers to the gas-transfer membrane material and core membrane element used in membrane aerated biofilm reactor systems. It serves two functions simultaneously: as the oxygen delivery interface and as the biofilm attachment surface. In operation, air or oxygen-enriched gas is supplied from the membrane side and diffuses through the membrane without visible bubbles, enabling counter-diffusion biofilm growth and efficient simultaneous nitrification-denitrification.

The upstream of the MABR membrane value chain consists mainly of polymer resins and specialty additives, including PVDF, PTFE, PP, PE, and PDMS/silicone-based materials, together with headers, spacers, supports, potting resin, air manifolds, and frames. Downstream customers include water technology vendors, OEMs, EPC contractors, utilities, and industrial end users, with major demand coming from municipal wastewater upgrades, retrofit intensification, industrial nitrogen removal, decentralized sewage treatment, and ecological water restoration.

In 2025, global MABR membrane production reached approximately 1,700 K Sqm, with an average global market price is \$18 per sqm.

MABR systems offer a compelling combination of operational advantages and technical challenges. Key benefits include enhanced nitrogen removal efficiency, reduced aeration energy demand, compact footprint, lower sludge production, and applicability for retrofit and decentralized solutions. Meanwhile, limitations such as membrane fouling, the need for robust materials with long service life, and the optimization of

process control under varying influent conditions remain topics of ongoing research and engineering refinement. These factors will shape the trajectory of MABR adoption and innovation in the medium term. The development of Membrane Aerated Biofilm Reactor (MABR) technology reflects a dynamic and project-driven adoption landscape rather than a steady linear growth. Global demand for MABR installations has exhibited temporal and regional fluctuations, strongly influenced by project scale, funding cycles, regulatory drivers, and the specific classification of applications. As jurisdictions prioritize different environmental and infrastructure outcomes, the volume of new MABR deployments may rise or fall accordingly, rather than conform to a uniform annual increase.

Regionally, MABR adoption is concentrated in China, North America, Europe, and Southeast Asia, where regulatory pressure on nutrient discharge, infrastructure renewal needs, and growing interest in energy-efficient wastewater solutions have supported both pilot projects and scaled deployments. Among these regions, China currently appears to be the most active application market, benefiting from a broader mix of municipal wastewater upgrading, capacity expansion, and surface water ecological restoration projects than most other markets.

From a technical classification perspective, MABR applications can be grouped based on membrane configuration into two primary categories: Hollow Fiber Membrane and Flat Sheet Membrane. Hollow fiber membranes typically provide high surface-area-to-volume ratios and efficient internal oxygen transfer pathways, making them suitable for compact, high-capacity installations. However, their fine filament structure can be more mechanically sensitive and prone to issues such as entanglement or fouling that are harder to remediate without full module replacement. In contrast, flat sheet membranes offer modular simplicity and design flexibility, and tend to exhibit better resistance to contamination and fouling because the flat membranes can be arranged with controlled gaps and gas-liquid flow to scour the surface more effectively.

In terms of end-use segmentation, MABR applications can be broadly categorized into Municipal Wastewater, Surface Water Ecological Restoration, and Others. Municipal wastewater treatment remains the largest and most mature sector, largely driven by stringent effluent nutrient limits and demand for retrofit solutions in aging treatment systems.

This report studies the global MABR Membrane production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for MABR Membrane 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 MABR Membrane that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global MABR Membrane total production and demand, 2021-2032, (K Sqm)

Global MABR Membrane total production value, 2021-2032, (USD Million)

Global MABR Membrane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global MABR Membrane consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: MABR Membrane domestic production, consumption, key domestic manufacturers and share

Global MABR Membrane production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global MABR Membrane production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global MABR Membrane production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global MABR Membrane 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 Fluence Corporation, Hydroking Tech, Veolia, DuPont OxyMem, Green Source Environmental Protection Technology, Jiangsu Julan Nano, LEDON-TECH, Oxymo Technology, 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 MABR Membrane market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sq m) 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 MABR Membrane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global MABR Membrane Market, Segmentation by Type:

Hollow Fiber Membrane

Flat Sheet Membrane

Global MABR Membrane Market, Segmentation by Membrane Configuration:

Hollow Fiber Type

Flat Plate Type

Spiral Coil Type

Tube Type

Global MABR Membrane Market, Segmentation by Material:

Polyvinylidene fluoride (PVDF)

Polypropylene (PP)

Others

Global MABR Membrane Market, Segmentation by Application:

Surface Water Ecological Restoration

Municipal Sewage

Others

Companies Profiled:

Fluence Corporation

Hydroking Tech

Veolia

DuPont OxyMem

Green Source Environmental Protection Technology

Jiangsu Julan Nano

LEDON-TECH

Oxymo Technology

Key Questions Answered:

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

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