

# Global Modular PSA Nitrogen Generator Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Modular PSA Nitrogen Generator market size is expected to reach \$ 476 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

Modular PSA nitrogen generators are on-site nitrogen production systems that utilize compressed air as the feedstock and Carbon Molecular Sieve (CMS) as the core adsorbent material. They generate a continuous supply of nitrogen by selectively adsorbing oxygen through a Pressure Swing Adsorption (PSA) cycle. The system integrates adsorption beds, valve assemblies, control systems, and piping into standardized, replicable modules that can be expanded via parallel connection. Key features include standardized module dimensions and interfaces, allowing for capacity scaling by adding or removing adsorption modules. These systems offer advantages such as a compact footprint, rapid installation and commissioning, ease of transport and capacity expansion, flexible partial-load operation, and the ability to service individual modules during maintenance. They are primarily used in sectors including food and beverage packaging and preservation, electronics and semiconductors, chemical and petrochemical inerting, pharmaceuticals, laser cutting and metal processing, lithium batteries and new energy materials, oil and gas, marine industries, automotive manufacturing, laboratories, and other applications requiring a stable on-site nitrogen source.

## Key Findings

Global Modular PSA Nitrogen Generator production reached approximately 6,700 units in 2025

The global average selling price was approximately US\$45,300 per unit in 2025

Single-bank modular systems currently account for the largest product segment, while expandable parallel modular systems are growing faster

Asia-Pacific has become the largest consumption and manufacturing region for Modular PSA Nitrogen Generators

## Market Trends

The global Modular PSA Nitrogen Generator market is evolving from simple equipment miniaturization toward a platform-based architecture featuring standardized adsorption modules, intelligent control, and on-demand capacity expansion. Traditional PSA systems are typically configured upfront according to the maximum project flow rate, whereas modular systems can initially install fewer modules based on actual load requirements, reducing upfront capital expenditure and improving part-load efficiency. At the same time, variable-flow control, purity-on-demand adjustment, remote monitoring, CMS condition management, and predictive maintenance are becoming important upgrade directions for mid- and high-end products. Future competition will increasingly shift from whether nitrogen can be generated on-site toward compressed air consumption per unit of nitrogen output, ease of module expansion, equipment footprint, valve assembly lifetime, CMS utilization efficiency, and digital operation and maintenance capabilities.

## Market Dynamics

### Drivers

The key growth drivers for Modular PSA Nitrogen Generators are industrial users' demand to reduce the cost of purchased liquid and bottled nitrogen, improve gas supply independence, and support flexible production-line expansion. Industries such as food packaging, electronics, chemicals, laser cutting, pharmaceuticals, and new energy generally require continuous nitrogen supply, while conventional liquid nitrogen supply involves transportation costs, storage tank rental, evaporation losses, and potential supply chain disruptions. On-site nitrogen generation converts a larger proportion of nitrogen supply costs into controllable electricity and maintenance expenses. Modular

architectures further address the expansion limitations of traditional customized PSA systems, allowing users to add adsorption modules according to actual production capacity while maintaining operation of other modules during partial maintenance.

## **Restraints**

Although modular design improves system flexibility, it does not eliminate the energy consumption constraints associated with PSA nitrogen generation. The primary operating cost of PSA systems comes from compressed air. When nitrogen purity increases from 99% to 99.999%, effective nitrogen recovery decreases while air consumption rises. As a result, some high-flow applications with relatively low purity requirements may still prefer membrane separation technology, while very large and continuously operated nitrogen users may adopt cryogenic air separation. In addition, increasing the number of modules also increases the number of valves, seals, sensors, and control nodes, placing higher requirements on parallel control, pressure equalization strategies, and long-term synchronized operation. Modular products must also balance standardized production with industry-specific customization, as marine, oil and gas, and explosion-proof applications impose significantly stricter requirements for materials, certification, and environmental adaptability than conventional factory applications.

## **Opportunities**

The largest incremental opportunities for Modular PSA Nitrogen Generators come from newly built production lines and the replacement of existing industrial gas supply models. The shift toward higher-power laser cutting equipment is increasing demand for high-pressure and high-purity on-site nitrogen generation, while the electronics and semiconductor, lithium battery, advanced materials, and pharmaceutical industries continue to raise requirements for low residual oxygen content and stable gas quality. Food and beverage producers are also reducing their dependence on liquid nitrogen logistics through on-site nitrogen generation. Modular systems can rapidly expand capacity by adding CMS adsorption columns or parallel module banks, making them particularly suitable for customers that build production capacity in phases. In addition, demand from marine vessels, LNG transportation, FPSOs, and offshore equipment for compact, reliable, and maintainable nitrogen generation systems is creating new high-value application opportunities for modular designs.

## Challenges

The industry faces increasing price transparency resulting from product standardization as well as intensifying cost competition driven by the expansion of Chinese supply chains. As modular architectures reduce engineering design complexity, adsorption modules, valve assemblies, and controllers are more easily standardized, requiring manufacturers to differentiate through lower Air Factor, longer CMS lifetime, more reliable valve systems, and advanced software control rather than relying solely on equipment architecture for pricing premiums. CMS performance is also affected by oil content and moisture in the inlet air, ambient temperature, and long-term adsorption cycles. Inadequate air pretreatment system design can therefore lead to premature degradation of molecular sieve performance. Significant differences in nitrogen purity, dew point, pressure, and certification requirements across end-use industries also limit the feasibility of fully standardized global product platforms.

## Industry Chain Analysis

The upstream segment of the Modular PSA Nitrogen Generator industry mainly includes carbon molecular sieves, aluminum-alloy or steel adsorption modules, pressure vessels, pneumatic and solenoid valves, filters, drying equipment, oxygen analyzers, pressure and flow sensors, PLC controllers, piping connections, air compressors, and nitrogen boosters. Midstream value creation is concentrated in adsorption process design, module flow-field optimization, CMS filling, pressure equalization control, purity adjustment, module parallel-control algorithms, and system integration. Manufacturers are increasingly extending from standalone nitrogen generator sales toward complete solutions integrating air compression, filtration, nitrogen generation, boosting, gas storage, and remote control. Downstream applications include food and beverage, electronics and semiconductors, chemicals and petrochemicals, pharmaceuticals, metal processing, laser cutting, new energy, oil and gas, marine, and scientific laboratories.

## Regional Insights

Asia-Pacific is the world's largest market for Modular PSA Nitrogen Generators, supported by strong demand from electronics manufacturing, lithium batteries, food processing, metal processing, and chemical industries across China, Japan, South Korea, and Southeast Asia. China has also developed a relatively complete supply chain covering CMS, valves, pressure vessels, and complete PSA system integration.

North America has a mature demand base in food processing, laboratories, laser processing, oil and gas, and industrial on-site nitrogen generation, supported by a well-established domestic supplier base. European manufacturers maintain strong capabilities in high-efficiency system design, modular architecture, and industrial distribution channels.

## Report Scope

This report studies the global Modular PSA Nitrogen Generator production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Modular PSA Nitrogen Generator 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 Modular PSA Nitrogen Generator that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Modular PSA Nitrogen Generator total production and demand, 2021-2032, (Units)

Global Modular PSA Nitrogen Generator total production value, 2021-2032, (USD Million)

Global Modular PSA Nitrogen Generator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Modular PSA Nitrogen Generator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Modular PSA Nitrogen Generator domestic production, consumption, key domestic manufacturers and share

Global Modular PSA Nitrogen Generator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Modular PSA Nitrogen Generator production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Modular PSA Nitrogen Generator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Modular PSA Nitrogen Generator 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 Atlas Copco, Parker Hannifin, Air Products, Pneumatech, Peak Scientific, OXYMAT, Generon, South-Tek Systems, Suzhou Since Gas Technology, Holtec Gas Systems, 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 Modular PSA Nitrogen Generator 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 Modular PSA Nitrogen Generator Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## **Market Segmentation**

### **Global Modular PSA Nitrogen Generator Market, Segmentation by Type:**

Single Module

Multiple Modules

Scalable Parallel Module

### **Global Modular PSA Nitrogen Generator Market, Segmentation by Nitrogen Generation Capacity:**

?50 Nm<sup>3</sup>/h

50–100 Nm<sup>3</sup>/h

>100 Nm<sup>3</sup>/h

### **Global Modular PSA Nitrogen Generator Market, Segmentation by Nitrogen Purity:**

95%–99.5%

99.5%–99.99%

?99.99%

## **Global Modular PSA Nitrogen Generator Market, Segmentation by Application:**

Food and Beverage

Electronics and Semiconductor

Chemical and Petroleum

Marine

Laboratory Analysis

Others

## **Companies Profiled:**

Atlas Copco

Parker Hannifin

Air Products

Pneumatech

Peak Scientific

OXYMAT

Generon

South-Tek Systems

Suzhou Since Gas Technology

Holtec Gas Systems

Noxerion

On Site Gas Systems

Shanghai Rich Gas Technology

Shanghai LifenGas

MINNUO Group

## Key Questions Answered

1. How big is the global Modular PSA Nitrogen Generator market?
2. What is the demand of the global Modular PSA Nitrogen Generator market?
3. What is the year over year growth of the global Modular PSA Nitrogen Generator market?
4. What is the total value of the global Modular PSA Nitrogen Generator market?
5. Who are the Major Players in the global Modular PSA Nitrogen Generator market?
6. What are the growth factors driving the market demand?

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