

Global Oxygen/Nitrogen Separation Membrane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Oxygen/Nitrogen Separation Membrane market size is expected to reach \$ 718 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

Oxygen/Nitrogen Separation Membrane (typically a hollow fiber gas separation membrane) is a selective semi-permeable membrane module made of polymers such as polyimide and polysulfone. It separates oxygen and nitrogen from compressed air based on the differences in solubility and diffusion coefficients of different gases within the membrane, thus producing nitrogen-rich or oxygen-rich gas. These are used in inertization, explosion-proofing, protective gas applications, and combustion-supporting and oxygen-enriched combustion scenarios. Typical products include UBE's polyimide N₂ separation membrane and Evonik's SEPURAN[®] N₂ membrane, which can produce nitrogen or oxygen-rich gas with 90-99.9% purity from air. The price of a single gas separation membrane element is approximately \$2,300, with a gross profit margin of approximately 30%.

The upstream of the industrial chain mainly consists of suppliers of high-performance engineering plastics and special polymers (such as polyimide hollow fiber), stainless steel or aluminum alloy pressure vessels, pipelines and compressors and other general equipment. Representative membrane technology providers include UBE and Evonik, which have developed polyimide N₂ separation membranes, SEPURAN[®] N₂ and other series of hollow fiber membrane products respectively.

The midstream sector comprises gas companies and equipment manufacturers such as Air Products, Air Liquide, Generon IGS, Parker Hannifin, and Grasys, as well as domestic companies like Tianbang Membrane, Guochu Technology, Huihai Membrane, Kelin Gas Source, and Wobo Group. These companies integrate membrane elements into onshore, marine, and vehicle-mounted membrane nitrogen/oxygen enrichment systems, providing complete skid-mounted or cabinet-mounted equipment.

Downstream customers are primarily concentrated in industries requiring continuous on-site gas supply and sensitive to gas safety and operating costs. These include inert gas protection for food and beverage packaging, nitrogen protection for electronics and semiconductor production lines, explosion-proof inerting for chemical and petrochemical plants, nitrogen sealing for oil and gas exploration and transportation (especially offshore platforms and pipelines), protective gas for metal heat treatment and laser cutting, and scenarios requiring oxygen-enriched air such as medical, wastewater treatment, and aquaculture. Membrane technology, with its modularity, flexible start-up and shutdown, and relatively low energy consumption, is continuously encroaching on the application space of traditional liquid nitrogen external supply and some small and medium-sized cryogenic air separation units.

From a technology lifecycle perspective, nitrogen-oxygen separation membrane gas exchange is not in its introductory or early growth phase, but rather a mature industrial technology that has completed core technology route verification and engineering finalization. Over the past two decades, membrane air separation has established a clear and replicable business model in the nitrogen production field, and its application reliability, operational lifespan, and maintenance logic have been validated by global industrial users over a long period. However, it is important to emphasize that 'maturity' does not equate to 'stagnant growth.' Current industry growth is not driven by single-point technological breakthroughs, but rather by the horizontal expansion of application scenarios and increased regional penetration. On the one hand, membrane nitrogen production has expanded from early manufacturing and food packaging scenarios to the petrochemical, oil and gas, shipbuilding, energy, and environmental protection sectors. On the other hand, in emerging markets and some regions with weak industrial foundations, the penetration rate of on-site gas generation replacing traditional gas supply models is still increasing, providing the industry with long-term, sustainable demand.

A key evolutionary characteristic of the nitrogen-oxygen separation membrane gas exchange industry is the shift in product focus from 'membrane modules' to 'system solutions.' Although the membrane module itself remains the core technology, market transactions are increasingly characterized by the delivery of complete gas generation systems, skid-mounted equipment, or containerized units. This trend reflects a shift in downstream customer demand: users are no longer focused on individual membrane performance parameters, but rather on the overall system's stable gas supply capacity at target purity, energy consumption, operation and maintenance costs, and long-term reliability. Consequently, companies with systems engineering capabilities, application experience, and service networks are gradually widening the gap with simple membrane module suppliers in the competition.

This report studies the global Oxygen/Nitrogen Separation Membrane production,

demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Oxygen/Nitrogen Separation Membrane total production and demand, 2021-2032, (Units)

Global Oxygen/Nitrogen Separation Membrane total production value, 2021-2032, (USD Million)

Global Oxygen/Nitrogen Separation Membrane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Oxygen/Nitrogen Separation Membrane consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Oxygen/Nitrogen Separation Membrane domestic production, consumption, key domestic manufacturers and share

Global Oxygen/Nitrogen Separation Membrane production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Oxygen/Nitrogen Separation Membrane production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Oxygen/Nitrogen Separation Membrane production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Oxygen/Nitrogen Separation 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 Air Products, Air Liquide, UBE, Evonik, Tianbang Membrane, Huihai Membrane Material, Grasys, Parker Hannifin, Generon IGS, Airrane Co Ltd, 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 Oxygen/Nitrogen Separation Membrane market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 Oxygen/Nitrogen Separation Membrane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Oxygen/Nitrogen Separation Membrane Market, Segmentation by Type:

Oxygen Membrane

Nitrogen Membrane

Global Oxygen/Nitrogen Separation Membrane Market, Segmentation by Class:

Hollow Fiber Membrane

Sheet Membrane

Other

Global Oxygen/Nitrogen Separation Membrane Market, Segmentation by Pressure:

0.1-0.5 Mpa

>0.5 Mpa

Global Oxygen/Nitrogen Separation Membrane Market, Segmentation by Application:

Oil and Gas

Chemicals

Mining and Metallurgy

Electronics and Semiconductors

Energy and Power

Agriculture

Aerospace

Other

Companies Profiled:

Air Products

Air Liquide

UBE

Evonik

Tianbang Membrane

Huihai Membrane Material

Grasys

Parker Hannifin

Generon IGS

Airrane Co Ltd

Key Questions Answered:

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

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