

Global Oxygen/Nitrogen Separation Membrane Market Growth 2026-2032

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Abstracts

The global Oxygen/Nitrogen Separation Membrane market size is predicted to grow from US\$ 490 million in 2025 to US\$ 695 million in 2032; it is expected to grow at a CAGR of 5.3% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'Oxygen/Nitrogen Separation Membrane Industry Forecast' looks at past sales and reviews total world Oxygen/Nitrogen Separation Membrane sales in 2025, providing a comprehensive analysis by region and market sector of projected Oxygen/Nitrogen Separation Membrane sales for 2026 through 2032. With Oxygen/Nitrogen Separation Membrane sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Oxygen/Nitrogen Separation Membrane industry.

This Insight Report provides a comprehensive analysis of the global Oxygen/Nitrogen Separation Membrane landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Oxygen/Nitrogen Separation Membrane portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Oxygen/Nitrogen Separation Membrane market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Oxygen/Nitrogen Separation Membrane and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Oxygen/Nitrogen Separation Membrane.

This report presents a comprehensive overview, market shares, and growth opportunities of Oxygen/Nitrogen Separation Membrane market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Oxygen Membrane

Nitrogen Membrane

Segmentation by Class:

Hollow Fiber Membrane

Sheet Membrane

Other

Segmentation by Pressure:

0.1-0.5 Mpa

>0.5 Mpa

Segmentation by Application:

Oil and Gas

Chemicals

Mining and Metallurgy

Electronics and Semiconductors

Energy and Power

Agriculture

Aerospace

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Air Products

Air Liquide

UBE

Evonik

Tianbang Membrane

Huihai Membrane Material

Grasys

Parker Hannifin

Generon IGS

Airrane Co Ltd

Key Questions Addressed in this Report

What is the 10-year outlook for the global Oxygen/Nitrogen Separation Membrane market?

What factors are driving Oxygen/Nitrogen Separation Membrane market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Oxygen/Nitrogen Separation Membrane market opportunities vary by end market size?

How does Oxygen/Nitrogen Separation Membrane break out by Type, by Application?

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