

Global Dry Local Scrubber Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Dry Local Scrubber market size was valued at US\$ 172 million in 2025 and is forecast to a readjusted size of US\$ 266 million by 2032 with a CAGR of 6.5% during review period.

Dry Local Scrubber is a waste gas treatment systems integrated downstream of process equipment. Through physical adsorption and chemical neutralization, they directly treat highly toxic, corrosive, or greenhouse gases without the involvement of liquids, ensuring that exhaust emissions meet environmental standards and guaranteeing production safety. Their core function is to achieve localized, real-time gas purification at the exhaust end of process equipment (such as etching machines and CVD systems), preventing pollutants from spreading into plant systems or the environment.

Semiconductor manufacturing processes are complex and highly dependent on equipment. Equipment performance directly impacts semiconductor manufacturing quality, process efficiency, and yield. Therefore, specialized semiconductor equipment is a leading and fundamental industry in the semiconductor sector, characterized by high technological barriers, long R&D cycles, high R&D investment, significant manufacturing difficulties, high equipment value, and high customer verification barriers. It represents one of the most challenging yet crucial links in the semiconductor industry.

Dry local scrubber, as a core sub-category of semiconductor waste gas treatment, boasts advantages such as zero wastewater generation, adaptability to complex multi-component waste gases, and alignment with the high-cleanliness production requirements of semiconductor manufacturing. Driven by both increasingly stringent environmental policies and the expansion of the semiconductor industry, the market is

experiencing steady growth, accelerated domestic substitution, and continuous technological upgrades.

Global main dry local scrubber players cover Ebara, Global Standard Technology, CS Clean Solution, Edwards Vacuum, CSK, Kanken Techno, GnBS Eco, etc. In terms of revenue, the global largest five manufacturers occupy a share nearly 70% in 2024. The high-end market has long been dominated by international giants, companies with deep technological accumulation and a monopoly on advanced process equipment. They hold a dominant position in the high-end market through long-term cooperation with leading global semiconductor manufacturers. However, emerging Chinese companies such as Brother Microelectronics and PNC Process Systems are rapidly rising, gradually achieving domestic substitution in mature process areas. Competition in the industry is expected to intensify in the coming years, especially in the Chinese market. With increasingly stringent environmental requirements and the accelerated relocation of the semiconductor industry to mainland China, the field of semiconductor process waste gas treatment is attracting more and more manufacturers.

As environmental protection requirements become increasingly stringent and the pan-semiconductor industry accelerates its transfer to mainland China, the field of pan-semiconductor process waste gas treatment is attracting more and more companies to enter. Global regulations on waste gas emissions are becoming increasingly stringent. For example, the United States, Europe, and China have strict emission standards, and manufacturers must use efficient pollutant control equipment to meet these requirements.

The Asia-Pacific region is the world's largest and fastest-growing market. Mainland China, driven by its strategy of achieving self-sufficiency in semiconductors, has seen a surge in new wafer fab projects, becoming a core growth engine. Taiwan and South Korea, relying on industry leaders such as TSMC, Samsung, and SK Hynix, have stable equipment demand. Japan, with its domestic semiconductor manufacturing base and equipment manufacturers, has formed a complete domestic supply and demand system. Furthermore, Southeast Asia and India, with the relocation of the semiconductor industry, are gradually releasing equipment demand, becoming potential growth areas.

Semiconductor manufacturing requires a cleanroom environment, where even the smallest contaminants in the air can affect the production process and the quality of the final product. Semiconductor production often involves various chemical gases (such as fluorides, ammonia, chlorine, and silanes). Failure to treat these gases can cause

significant harm to the environment and production facilities. Dry local scrubbers are designed to remove these harmful gases, ensuring a clean environment.

This report is a detailed and comprehensive analysis for global Dry Local Scrubber market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Dry Local Scrubber market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Dry Local Scrubber market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Dry Local Scrubber market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Dry Local Scrubber market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Dry Local Scrubber

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Dry Local Scrubber market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Ebara, Edwards Vacuum, CS Clean Solution, CSK(?????(?)), Global Standard Technology, Kanken Techno, GnBS Eco, UNISEM, Taiyo Nippon Sanso, KC Innovation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Dry Local Scrubber market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Single Column

Double Column

Market segment by Application

CVD

Etching

Others

Major players covered

Ebara

Edwards Vacuum

CS Clean Solution

CSK(?????(?))

Global Standard Technology

Kanken Techno

GnBS Eco

UNISEM

Taiyo Nippon Sanso

KC Innovation

Air Water Mechatronics

Triple Cores Technology

Integrated Plasma Inc (IPI)

Shanghai Brother Microelectronics Technology

PNC Process Systems

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Dry Local Scrubber product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Dry Local Scrubber, with price, sales quantity, revenue, and global market share of Dry Local Scrubber from 2021 to 2026.

Chapter 3, the Dry Local Scrubber competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Dry Local Scrubber breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Dry Local Scrubber market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Dry Local Scrubber.

Chapter 14 and 15, to describe Dry Local Scrubber sales channel, distributors, customers, research findings and conclusion.

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