

Global Gas-phase Odor Control Equipment 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 Gas-phase Odor Control Equipment market size was valued at US\$ 1667 million in 2025 and is forecast to a readjusted size of US\$ 2375 million by 2032 with a CAGR of 5.2% during review period.

Gas-phase odor control equipment refers to specialized environmental protection equipment designed to treat gas-phase pollutants containing hydrogen sulfide, ammonia, amines, mercaptans, sulfides, volatile organic compounds and mixed odorous gases generated from municipal wastewater treatment, sludge treatment, solid waste treatment, kitchen waste treatment, composting, anaerobic digestion, food processing, chemical production, petrochemicals, pharmaceuticals, papermaking, rubber processing, livestock breeding and other industrial production processes. Through collection, conveyance, pretreatment, absorption, adsorption, biodegradation, oxidative decomposition or multi-stage combined treatment processes, such equipment reduces odor emissions and enables treated exhaust gas to meet applicable emission standards. Typical product forms include biofilters, biotrickling filter towers, bioscrubbers, chemical scrubbers, activated carbon adsorption units, dry media filters, deep-bed scrubbers, RTO/RCO oxidation systems, mobile activated carbon filtration systems, and integrated systems consisting of collection hoods, ducts, fans, control systems and terminal treatment units.

Depending on project scale and technology configuration, small pump-station odor control units or localized exhaust-gas deodorization equipment are typically priced at the level of tens of thousands of US dollars, while large-scale multi-stage integrated systems for wastewater treatment plants, solid waste treatment facilities or industrial

parks may reach several hundred thousand to several million US dollars. Based on the data disclosed by Chuhuan Technology, its 2025 revenue from exhaust-gas and odor control equipment was approximately RMB 415 million, with sales volume of 187 sets, implying an average revenue of approximately RMB 2.22 million per set. This can clearly serve as a useful reference benchmark for medium-sized municipal and industrial odor control systems in China.

Gas-phase odor control equipment is best understood as a specialized environmental equipment segment that addresses malodorous air streams from municipal wastewater, sewer networks, sludge handling, solid waste processing, food production, chemicals, petrochemicals and other industrial processes. The sector is not defined by one single technology; it is defined by the treatment objective of capturing and reducing odor-causing gases before discharge. In a narrow equipment-based scope, the market should include biofilters, biotrickling filters, bioscrubbers, chemical scrubbers, activated carbon adsorbers, dry media scrubbers, deep-bed scrubbers, RTO/RCO systems and packaged hybrid odor control units. It should not include stand-alone deodorizing chemicals, consumer air purifiers, pure liquid-phase sewer dosing, odor measurement services or general HVAC filtration products without a clear industrial or municipal odor-control function.

The global supply base is fragmented but technically mature. North America has a strong group of municipal and industrial suppliers, including providers of vapor-phase odor control systems, biological treatment systems, scrubbers, adsorbers and oxidizers. Europe is characterised by a large number of specialist medium-sized manufacturers with strengths in biological treatment, gas scrubbing and mobile activated carbon filtration. China has a growing domestic equipment base, with Chuhuan Technology providing one of the clearest public financial anchors for dedicated exhaust-gas and odor-control equipment. However, the Chinese supplier pool remains more fragmented than North America and Europe, and many local manufacturers require further verification of manufacturing capability, project history and revenue mix before being placed into the core formal list.

Demand is structurally supported by wastewater infrastructure, urban environmental standards, odor complaints around waste and sludge facilities, and industrial emission-management requirements. Municipal wastewater treatment plants, pump stations, sludge facilities, waste transfer stations, composting plants and anaerobic digestion facilities remain the most stable end-use markets. Industrial demand is more diverse and is often linked to VOC control, workplace health, community relations and regulatory compliance. This creates a market with both new-build and retrofit demand,

supported by replacement of aging systems, upgrade of underperforming equipment, media replacement, remote monitoring and service-based mobile filtration.

Technology development is moving toward hybrid and lifecycle-oriented solutions. Biological systems remain attractive where airflow is large and operating cost is important, while chemical scrubbers are preferred for reactive or soluble compounds at higher loads. Activated carbon and dry media systems are widely used for polishing, compact installations and emergency response. Thermal and catalytic oxidation systems are more relevant where odor control overlaps with VOC destruction. The most competitive suppliers are therefore those able to diagnose site-specific gas characteristics, combine technologies, guarantee performance and provide reliable after-sales support rather than simply selling a single generic device.

This report is a detailed and comprehensive analysis for global Gas-phase Odor Control Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Treatment Technology 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 Gas-phase Odor Control Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Gas-phase Odor Control Equipment 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 Gas-phase Odor Control Equipment market size and forecasts, by Treatment Technology and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Gas-phase Odor Control Equipment 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 Gas-phase Odor Control Equipment
- 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 Gas-phase Odor Control Equipment 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 Xylem, BIOREM Inc., BioAir Solutions, Hangzhou Chuhuan Science and Technology Company Limited, CECO Environmental, ERG Air Pollution Control, D?rr CTS GmbH, John Zink Hamworthy Combustion, DESOTEC, Purafil, etc.

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

Market Segmentation

Gas-phase Odor Control Equipment market is split by Treatment Technology and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Treatment Technology, 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 Treatment Technology

- Biological Treatment
- Wet Chemical Scrubbing
- Adsorption / Dry Media
- Thermal / Catalytic Oxidation

Other

Market segment by System Configuration

Packaged / Skid-mounted Units

Field-erected Systems

Mobile / Rental Filtration Systems

Integrated Collection and Treatment Systems

Market segment by Target Odorant Group

Sulfur Compounds

Nitrogen Compounds

Organic Odors / VOCs

Mixed Odor Streams

Market segment by Application

Municipal Wastewater and Sewer

Solid Waste and Organics Processing

Industrial Process Odor Control

Agriculture and Livestock

Other

Major players covered

Xylem

BIOREM Inc.

BioAir Solutions

Hangzhou Chuhuan Science and Technology Company Limited

CECO Environmental

ERG Air Pollution Control

D?rr CTS GmbH

John Zink Hamworthy Combustion

DESOTEC

Purafil

Calgon Carbon

Camfil

Ship & Shore Environmental

Tri-Mer Corporation

Bionomic Industries

Verantis

Likusta Umwelttechnik

Air Clean S.r.l.

TECNIUM

Shanghai MASTECK Environmental Co., Ltd.

Shenzhen Kelai Environmental Protection Technology Co., Ltd.

Shanghai Keshou Environmental Protection Technology Co., Ltd.

SERECO S.r.l.

Condorchem Envitech

Biotech Biofilter 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 Gas-phase Odor Control Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Gas-phase Odor Control Equipment, with price, sales quantity, revenue, and global market share of Gas-phase Odor Control Equipment from 2021 to 2026.

Chapter 3, the Gas-phase Odor Control Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed

emphatically by landscape contrast.

Chapter 4, the Gas-phase Odor Control Equipment 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 Treatment Technology and by Application, with sales market share and growth rate by Treatment Technology, 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 Gas-phase Odor Control Equipment market forecast, by regions, by Treatment Technology, 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 Gas-phase Odor Control Equipment.

Chapter 14 and 15, to describe Gas-phase Odor Control Equipment sales channel, distributors, customers, research findings and conclusion.

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