

Global Gas-phase Odor Control Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Gas-phase Odor Control Equipment market size is expected to reach \$ 2375 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

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 studies the global Gas-phase Odor Control Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Gas-phase Odor Control Equipment 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 Gas-phase Odor Control Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Gas-phase Odor Control Equipment total production and demand, 2021-2032, (Units)

Global Gas-phase Odor Control Equipment total production value, 2021-2032, (USD Million)

Global Gas-phase Odor Control Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Gas-phase Odor Control Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Gas-phase Odor Control Equipment domestic production, consumption, key domestic manufacturers and share

Global Gas-phase Odor Control Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Gas-phase Odor Control Equipment production by Treatment Technology, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Gas-phase Odor Control Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Gas-phase Odor Control Equipment 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Gas-phase Odor Control Equipment 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 Treatment Technology, 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 Gas-phase Odor Control Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gas-phase Odor Control Equipment Market, Segmentation by Treatment Technology:

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

Global Gas-phase Odor Control Equipment Market, Segmentation by System Configuration:

- Packaged / Skid-mounted Units
- Field-erected Systems
- Mobile / Rental Filtration Systems
- Integrated Collection and Treatment Systems

Global Gas-phase Odor Control Equipment Market, Segmentation by Target Odorant Group:

- Sulfur Compounds
- Nitrogen Compounds
- Organic Odors / VOCs
- Mixed Odor Streams

Global Gas-phase Odor Control Equipment Market, Segmentation by Application:

Municipal Wastewater and Sewer

Solid Waste and Organics Processing

Industrial Process Odor Control

Agriculture and Livestock

Other

Companies Profiled:

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

Bioteg Biofilter Systems

Key Questions Answered:

1. How big is the global Gas-phase Odor Control Equipment market?
2. What is the demand of the global Gas-phase Odor Control Equipment market?
3. What is the year over year growth of the global Gas-phase Odor Control Equipment market?
4. What is the production and production value of the global Gas-phase Odor Control Equipment market?
5. Who are the key producers in the global Gas-phase Odor Control Equipment market?
6. What are the growth factors driving the market demand?

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