

# Global Marine Exhaust Gas Treatment / Aftertreatment Systems Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Marine Exhaust Gas Treatment / Aftertreatment Systems market size is expected to reach \$ 8104 million by 2032, rising at a market growth of 7.6% CAGR during the forecast period (2026-2032).

Marine exhaust gas treatment and aftertreatment systems refer to shipboard environmental control equipment installed downstream of main engines, auxiliary engines, boilers and other combustion exhaust sources to reduce sulphur oxides, nitrogen oxides, particulate matter, smoke and selected hazardous exhaust constituents before discharge to the atmosphere. This study focuses on system-level marine compliance products, including exhaust gas cleaning systems, SOx scrubbers, open-loop, closed-loop and hybrid wet scrubbers, dry or semi-dry desulphurisation systems, marine SCR and DeNOx systems, high-pressure and low-pressure SCR, combined DPF/SCR solutions, scrubber wash-water treatment units, water monitoring systems, continuous emission monitoring and related control packages.

Core technical processes include seawater or alkaline absorption, gas-liquid mass transfer, catalytic reduction, urea dosing and mixing, particulate filtration, wash-water separation, pH/turbidity/PAH monitoring, class-approved marine integration and interface control with engines, exhaust ducts and vessel automation systems.

Depending on vessel size, engine output and integration complexity, small and medium marine SCR packages are typically priced from tens of thousands to several hundred thousand US dollars, while large marine SCR systems can reach the million-dollar range. Marine scrubber or EGCS equipment packages commonly fall in the approximate range of USD 0.8–6.0 million per vessel, with large multi-engine, hybrid,

cruise or ultra-large container vessel projects priced higher.

According to our research, the marine exhaust gas aftertreatment systems industry should not be understood as a narrowly defined “marine scrubber” market. Rather, it represents a system-level environmental equipment segment formed around vessel air-emission compliance. The core of the industry is structured around two principal technology lines: EGCS/SOx scrubbers and SCR/DeNOx systems. The former addresses SOx emissions and part of the particulate matter burden when vessels continue to use high-sulphur fuel oil under equivalent compliance arrangements, while the latter enables marine diesel engines to meet Tier III nitrogen oxide requirements when operating in designated NOx Emission Control Areas. The demand foundation is therefore shaped by IMO 2020, regional ECA sulphur limits and NOx Tier III requirements. Within this framework, SOx scrubbers have already moved into a mature phase of installed-base operation and aftermarket service, whereas SCR systems continue to generate incremental demand from newbuild vessels, workboats, yachts and the gradual strengthening of regional emission rules. For the purpose of this study, the industry boundary is defined as pollutant aftertreatment systems installed within the onboard exhaust path, and does not combine low-sulphur fuels, alternative fuels, shore power, conventional marine engines or shipyard installation services into the same statistical scope.

From the supply-side perspective, the global market is characterised by a structure in which European leaders retain strong technological and installed-base advantages, Japanese and Korean suppliers benefit from established engine and shipbuilding ecosystems, Chinese domestic manufacturers are rapidly filling local supply-chain gaps, and North American players maintain a meaningful presence in medium-power and retrofit-oriented solutions. Wärtsilä, Alfa Laval, Valmet, ANDRITZ, Ecospray, Clean Marine, Manta Marine, Langle Tech, PureteQ and CR Ocean constitute the core supplier pool in EGCS and marine scrubber systems. Everlence, H+H, Hug Engineering, PANASIA, Kanadevia, Japan Engine, Yanmar, Mitsubishi, Daihatsu, TEHAG, Eminox and Nett Technologies, by contrast, demonstrate varying degrees of capability across SCR, DPF and DeNOx-related product lines. In China, Shanghai Qiyao Environmental Technology and Shanghai Bluesoul have relatively clear official product evidence and project foundations, while regional manufacturing entities such as Yantai Hyundai Heavy Industries and Shanghai ContiOcean should be retained within the extended supplier universe. It is important to note that this market cannot be screened purely by revenue ranking, as many genuine OEMs, engine-integrated suppliers and privately held niche manufacturers do not disclose product-level revenue.

From the demand-side perspective, industry growth after 2025 is no longer driven solely by the concentrated retrofit cycle associated with IMO 2020. Instead, demand is increasingly shifting towards three sources: spare parts, maintenance, sensors and wash-water treatment upgrades for the installed scrubber fleet; newbuild specifications for hybrid scrubbers, SCR systems and emission-control packages compatible with alternative-fuel vessels; and medium-power aftertreatment demand from workboats, harbour craft, inland vessels and high-end yachts as regional emission rules become more stringent. The Mediterranean SOx ECA entered into effect in 2025, while NOx ECAs in North America and Europe continue to influence vessel specification and operational planning. As a result, shipowners must continue to evaluate the economic trade-offs among low-sulphur fuel, scrubbers, SCR systems, alternative fuels and route deployment. The wider the fuel-price spread, the stronger the payback logic for scrubber investment; the stricter the port and coastal restrictions on wash-water discharge, the greater the value proposition of closed-loop and hybrid systems, water treatment units and monitoring systems.

From a product-roadmap perspective, future competition is moving beyond the basic question of whether a system can remove sulphur or nitrogen oxides. The competitive focus is shifting towards lifecycle cost, compliance margin, space efficiency, pressure drop, energy consumption, remote monitoring, wash-water management, and compatibility with future fuels and onboard carbon-capture systems. Open-loop scrubbers face increasing pressure from port and coastal wash-water discharge restrictions, which enhances the relative value of hybrid and closed-loop configurations. SCR systems, in turn, must address low-temperature operation, urea crystallisation, catalyst durability, engine load fluctuation and machinery-space constraints. Some suppliers have already extended their scrubber platforms into water treatment, microplastic filtration, methane abatement, onboard carbon capture or broader marine environmental solutions. This indicates that the industry is gradually evolving from a single-point compliance equipment market into a broader marine environmental technology platform, although SOx/NOx compliance and the economics of the existing fleet will remain the primary commercial drivers in the near term.

This report studies the global Marine Exhaust Gas Treatment / Aftertreatment Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Marine Exhaust Gas Treatment / Aftertreatment Systems 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

Marine Exhaust Gas Treatment / Aftertreatment Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Marine Exhaust Gas Treatment / Aftertreatment Systems total production and demand, 2021-2032, (Units)

Global Marine Exhaust Gas Treatment / Aftertreatment Systems total production value, 2021-2032, (USD Million)

Global Marine Exhaust Gas Treatment / Aftertreatment Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Marine Exhaust Gas Treatment / Aftertreatment Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Marine Exhaust Gas Treatment / Aftertreatment Systems domestic production, consumption, key domestic manufacturers and share

Global Marine Exhaust Gas Treatment / Aftertreatment Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Marine Exhaust Gas Treatment / Aftertreatment Systems production by Pollutant Control Function, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Marine Exhaust Gas Treatment / Aftertreatment Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Marine Exhaust Gas Treatment / Aftertreatment Systems 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 Wärtsilä Corporation, Alfa Laval AB, Shanghai Qiyao Environmental Technology Co., Ltd., PANASIA Co., Ltd., Ecospray Technologies S.r.l., Manta Marine Technologies AB, Valmet Corporation, ANDRITZ AG, Clean Marine AS, Pacific Green Marine Technologies, 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 Marine Exhaust Gas Treatment / Aftertreatment Systems 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 Pollutant Control Function, 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 Marine Exhaust Gas Treatment / Aftertreatment Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Marine Exhaust Gas Treatment / Aftertreatment Systems Market, Segmentation by Pollutant Control Function:

SOx Reduction Systems

NOx Reduction Systems

Particulate and Soot Control Systems

Integrated Multi-pollutant Systems

## Global Marine Exhaust Gas Treatment / Aftertreatment Systems Market, Segmentation by Product Architecture:

Open-loop Systems

Closed-loop Systems

Hybrid Systems

Other / Dry Systems

## Global Marine Exhaust Gas Treatment / Aftertreatment Systems Market, Segmentation by Scrubber Operating Mode:

Scrubber Tower-based Systems

Catalyst-based Systems

Filtration-based Systems

Monitoring and Control Packages

## Global Marine Exhaust Gas Treatment / Aftertreatment Systems Market, Segmentation by Application:

Deep-sea Merchant Vessels

Passenger and Cruise Vessels

Workboats and Offshore Vessels

Inland and Harbour Craft

## Companies Profiled:

Wärtsilä Corporation

Alfa Laval AB

Shanghai Qiyao Environmental Technology Co., Ltd.

PANASIA Co., Ltd.

Ecospray Technologies S.r.l.

Manta Marine Technologies AB

Valmet Corporation

ANDRITZ AG

Clean Marine AS

Pacific Green Marine Technologies

CR Ocean Engineering, LLC

Langh Tech Oy Ab

PureteQ A/S

Everllence SE

H+H Engineering & Service GmbH

Hug Engineering AG

SAACKE GmbH

VDL AEC Maritime

Fuji Electric Co., Ltd.

Kanadevia Corporation

Japan Engine Corporation

Yanmar Holdings / Yanmar Marine

Mitsubishi Heavy Industries Engine & Turbocharger

Daihatsu Infinearth Mfg. Co., Ltd.

Kangrim Heavy Industries

Global Echo Co., Ltd.

KwangSung / GETSCR

LiqTech International

STT Emtec AB

TEHAG Deutschland GmbH

Eminox Limited

Nett Technologies Inc.

Tenneco Inc.

Shanghai Bluesoul Environmental Technology

Yantai Hyundai Heavy Industries

Shanghai ContiOcean Environment Tech

#### Key Questions Answered:

1. How big is the global Marine Exhaust Gas Treatment / Aftertreatment Systems market?
2. What is the demand of the global Marine Exhaust Gas Treatment / Aftertreatment Systems market?
3. What is the year over year growth of the global Marine Exhaust Gas Treatment /

Aftertreatment Systems market?

4. What is the production and production value of the global Marine Exhaust Gas Treatment / Aftertreatment Systems market?

5. Who are the key producers in the global Marine Exhaust Gas Treatment / Aftertreatment Systems market?

6. What are the growth factors driving the market demand?

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