

# Global Marine 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 Marine Scrubber market size was valued at US\$ 5049 million in 2025 and is forecast to a readjusted size of US\$ 8997 million by 2032 with a CAGR of 8.7% during review period.

The overwhelming majority of ships around the world operate using engines and boilers powered by heavy fuel oil. The resulting combustion exhaust gases that are emitted contain soot and sulfur oxides that pollute the environment. Ship Exhaust Gas Scrubber exhaust gas cleaning reduces sulphur (SO<sub>2</sub>) and particulate emissions from ship engines, generators, and boilers. Ship Exhaust Gas Scrubber should enable ships to meet sulphur emission limits as required by IMO MARPOL Annex VI regulations without switching to low-sulphur fuel. This report mainly covers the Ship Exhaust Gas Scrubber product type: Open Loop Scrubbers, Closed Loop Scrubbers, and Hybrid scrubbers.

The maritime industry has faced increasing scrutiny regarding its environmental impact. Heavy fuel oil, commonly used in ships, is high in sulfur content, which when burned, generates sulfur oxides that contribute to acid rain and respiratory issues in humans. The introduction of the IMO 2020 regulations, which limit the sulfur content of marine fuel to 0.5%, has prompted ship operators to either switch to low-sulfur fuel or invest in exhaust gas cleaning systems. Marine scrubbers present an efficient alternative to changing fuel types, allowing ships to continue using HFO while effectively reducing harmful emissions.

Marine scrubbers can be categorized into three main types: Open Loop Scrubbers, Closed Loop Scrubbers, and Hybrid Scrubbers.

## 1. Open Loop Scrubbers

Open loop scrubbers utilize seawater to wash the exhaust gases. The sulfur oxides are absorbed by the seawater, which is then discharged back into the ocean, often with a slight increase in pH. While this system is simple and cost-effective, it has faced criticism for its environmental impact, particularly in ecologically sensitive areas.

## 2. Closed Loop Scrubbers

Closed loop scrubbers, on the other hand, use a closed system where water is recirculated and treated to remove pollutants. The resultant brine is stored and disposed of properly, minimizing environmental impact. This type of scrubber is often preferred in areas where discharge into the sea is prohibited or regulated, making it more suitable for inland or sensitive marine environments.

## 3. Hybrid Scrubbers

Hybrid scrubbers combine the features of both open and closed loop systems, allowing operators to switch between modes depending on regulatory requirements and environmental conditions. This versatility has made hybrid scrubbers the largest segment in the marine scrubber market, as they offer flexibility and compliance with various regulations.

Wartsila, Yara Marine Technologies (Okapi), HHI Scrubbers, Alfa Laval, and Panasia are the top five manufacturers, accounting for approximately 52% of the global market share. Their strong presence is attributed to their innovative technologies, extensive experience, and strong customer relationships.

## Applications of Marine Scrubbers

The marine scrubber market is primarily driven by two application segments: retrofitting existing vessels and equipping new ships.

### Retrofit

Many shipping companies are opting to retrofit existing vessels with scrubbers rather than replacing engines or switching fuel types. This option is often more cost-effective and enables compliance with new regulations without significant alterations to operational procedures. Retrofit projects are gaining momentum, especially as the

economic benefits of maintaining the use of HFO become evident.

## New Ships

In addition to retrofitting, there is a growing trend towards equipping new ships with marine scrubbers from the outset. Shipbuilders are increasingly incorporating scrubber systems into the design of new vessels to meet future regulatory requirements and enhance sustainability profiles. This shift reflects a broader industry move towards greener technologies and operational practices.

Europe is currently the largest consumer of marine scrubbers, driven by stringent regulatory frameworks and a high concentration of shipping activity. The European Union has implemented strict emissions regulations, making scrubbers an essential part of compliance strategies for ship operators in the region. As awareness of environmental issues grows globally, other regions, particularly Asia-Pacific, are also beginning to adopt marine scrubbers more widely.

The marine scrubber market is expected to witness significant growth in the coming years, driven by several key trends:

**Increased Regulatory Pressure:** As global environmental regulations become more stringent, the demand for marine scrubbers is likely to rise. Compliance with IMO regulations will be a primary driver, encouraging more shipping companies to invest in EGCS.

**Technological Advancements:** Ongoing innovation in scrubber technology will enhance efficiency and effectiveness in removing pollutants. Manufacturers are investing in research and development to improve existing systems and develop new solutions that meet changing regulatory requirements.

**Sustainability Initiatives:** The maritime industry's focus on sustainability will continue to grow, pushing operators towards greener technologies. The adoption of scrubbers aligns with corporate social responsibility goals and public demand for cleaner shipping practices.

**Economic Considerations:** With the rising costs of low-sulfur fuel, many ship operators are finding it economically viable to install scrubbers as a long-term investment. The financial benefits of maintaining HFO usage, coupled with the reduction of compliance costs, will drive further adoption.

Hybrid Solutions: The trend towards hybrid scrubbers will continue as operators seek flexibility in complying with varying environmental regulations across different jurisdictions. Hybrid systems offer the advantage of switching modes based on operational needs and regulatory environments.

This report is a detailed and comprehensive analysis for global Marine 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 Marine Scrubber market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (M US\$/Unit), 2021-2032

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

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

Global Marine Scrubber market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (M 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 Marine 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 Marine 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 Wartsila, Alfa Laval, Yara Marine Technologies (Okapi), Panasia, HHI Scrubbers, CR Ocean Engineering, Puyier, EcoSpray, Bilfinger, Valmet, etc.

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

## **Market Segmentation**

Marine 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

Open Loop Scrubbers

Closed Loop Scrubbers

Hybrid Scrubbers

Other Types

### Market segment by Application

Retrofit

New Ships

### Major players covered

Wartsila

Alfa Laval

Yara Marine Technologies (Okapi)

Panasia

HHI Scrubbers

CR Ocean Engineering

Puyier

EcoSpray

Bilfinger

Valmet

Clean Marine

ME Production

Shanghai Bluesoul

Saacke

Langh Tech

AEC Maritime

PureteQ

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:**

*Global Marine Scrubber Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032*

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

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

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

Chapter 4, the Marine 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 Marine 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 Marine Scrubber.

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

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