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Global Dry Local Scrubber Market Growth 2026-2032

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Abstracts

The global Dry Local Scrubber market size is predicted to grow from US$ 144 million in 2025 to US$ 228 million in 2032; it is expected to grow at a CAGR of 6.9% from 2026 to 2032.

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.

Key Findings

In 2025, China accounts for approximately 19% of the global market for dry exhaust gas treatment systems, with its share projected to rise to about 22% by 2032

The Asia-Pacific region is currently the largest and fastest-growing regional market for dry exhaust gas treatment systems globally

In 2025, the top six global manufacturers collectively hold a market share of over 75%

CVD and etching are the core application areas for semiconductor dry exhaust gas treatment systems

Market Trends

The Dry Local Scrubber market is moving toward higher adsorption efficiency, broader

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gas compatibility, longer consumable life, lower environmental burden, and more intelligent equipment management. As semiconductor manufacturing advances toward 3 nm, 2 nm, increasingly complex multilayer structures, and more demanding deposition and etching processes, exhaust compositions are becoming more complex and process-specific. This is driving closer co-development between adsorbent materials and scrubber hardware, including specialized sorbents for trace toxic gases, fluorine- and silicon-containing exhaust streams, and highly reactive process gases. Equipment design is also becoming more modular, allowing users to configure reaction columns and treatment media according to individual process tools. Double Column systems are gaining technical relevance where higher treatment capacity, longer operating intervals, or greater operational continuity is required. At the same time, semiconductor manufacturers are placing increasing emphasis on reducing water consumption and secondary waste generation, supporting greater interest in dry treatment solutions where technically and economically suitable. Longer term, integration of sensors, adsorbent-life monitoring, preventive maintenance functions, and digital fab management systems is expected to improve equipment utilization and total cost of ownership.

Market Dynamics

Drivers

Growth of the Dry Local Scrubber market is primarily supported by semiconductor fab expansion and increasing exhaust treatment requirements associated with CVD, etching, deposition, and related manufacturing processes. New wafer-fab construction and capacity expansion create direct demand for additional point-of-use exhaust treatment units because scrubber demand is closely linked to the number and configuration of process tools. China represents an especially important growth market, with its Dry Local Scrubber market reaching US$26.10 million in 2024 and expected to reach US$48.25 million by 2031. Increasing localization of semiconductor equipment supply, combined with investment in domestic wafer manufacturing capacity, is expanding the addressable market for local suppliers. Environmental compliance and the semiconductor industry's broader focus on reducing water consumption and secondary pollution are also increasing the attractiveness of dry adsorption technologies for suitable exhaust streams.

Restraints

Dry Local Scrubber technology is not universally suitable for every semiconductor

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exhaust stream, which limits its ability to replace combustion, plasma-wet, burn-wet, and other abatement technologies across all processes. Treatment effectiveness depends heavily on matching the adsorbent or reactive medium to gas composition, concentration, flow rate, temperature, moisture content, and process by-products. Consumable replacement can also represent a meaningful operating cost, particularly for high-flow or high-loading processes, while exhausted adsorption media requires controlled handling and disposal. Semiconductor customers additionally impose demanding requirements for safety, treatment stability, equipment uptime, contamination control, and process qualification. These factors create relatively high technical and customer-validation barriers and may extend the qualification cycle for new suppliers entering advanced semiconductor manufacturing lines.

Opportunities

The strongest opportunities are emerging from continued semiconductor capacity expansion in Asia, localization of semiconductor equipment supply chains in China, and increasing demand for lower-water and lower-secondary-pollution abatement solutions. As advanced processes require more specialized chemistries, opportunities are expanding for high-performance adsorbents tailored to specific gases and process combinations rather than standardized general-purpose media. Modular equipment architectures and Double Column configurations provide another growth avenue by enabling higher adsorption capacity, flexible column switching, and longer maintenance intervals. Chinese suppliers also have opportunities to increase penetration from mature-node fabs into more demanding process environments as product reliability, adsorbent performance, safety certification, and field-service capabilities improve. Outside established semiconductor manufacturing centers, new fab investment in Southeast Asia and other emerging semiconductor production locations creates additional opportunities for suppliers capable of combining equipment sales with local technical support and consumables services.

Challenges

One of the principal challenges for Dry Local Scrubber suppliers is balancing removal efficiency, adsorbent utilization, equipment footprint, maintenance frequency, and operating cost under increasingly complex semiconductor process conditions. Advanced fabs generally require extensive equipment qualification and long-term reliability verification, making customer acquisition difficult for suppliers without an established installed base. Rapid process evolution also requires continuous development of new adsorption materials and equipment configurations, while improper matching of treatment media and target gases can reduce efficiency or create safety

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risks. In addition, geopolitical tensions and semiconductor supply-chain regionalization are encouraging customers to emphasize local sourcing and service continuity. Suppliers therefore need not only competitive equipment technology but also regional manufacturing, consumables supply, spare-parts availability, application engineering, and rapid after-sales response capabilities.

Industry Chain Analysis

The Dry Local Scrubber industry chain begins with specialty adsorbents, reactive chemicals, porous materials, stainless-steel structures, valves, gas sensors, pressure and flow-control components, electronic control systems, and other corrosion-resistant components. Adsorbent formulation and usable capacity are particularly important because they directly influence gas removal efficiency, media life, maintenance intervals, and operating costs. Midstream manufacturers integrate adsorption columns, gas-flow systems, monitoring modules, safety controls, cabinets, and process-specific treatment media into point-of-use exhaust abatement systems. The downstream market consists primarily of semiconductor fabs and semiconductor process-tool environments, especially CVD and etching installations. Value creation extends beyond initial equipment sales to adsorbent replacement, column or canister services, preventive maintenance, spare parts, equipment upgrades, and process optimization, creating recurring aftermarket revenue opportunities for suppliers with large installed bases and strong local service networks.

Segment Insights

By type, the Dry Local Scrubber market is divided into Single Column and Double Column systems. Single Column systems generally provide a more compact configuration and are suitable where process exhaust loading and required adsorption capacity can be handled by one reaction column. They can offer advantages in footprint, system simplicity, and initial equipment cost. Double Column systems provide greater sorbent capacity and, depending on system design, can support serial treatment, switching, redundancy, or extended operating intervals. Their value becomes more pronounced in applications where customers prioritize higher utilization, longer maintenance cycles, and reduced interruption associated with adsorbent replacement.

The future development of both configurations will increasingly depend on adsorption-media performance rather than mechanical configuration alone. Suppliers able to combine high-capacity specialized adsorbents with real-time media-life monitoring and optimized gas distribution can potentially improve utilization of each adsorption column

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and lower lifetime operating costs. Consequently, competition is gradually shifting from standalone equipment specifications toward integrated performance involving equipment, adsorption materials, process compatibility, safety, and lifecycle service.

Downstream Market Opportunities

CVD and etching constitute the core downstream applications for Dry Local Scrubber equipment because these processes use a broad range of reactive, corrosive, toxic, fluorinated, chlorinated, and silicon-containing process gases. CVD-related opportunities are supported by increasing deposition complexity in advanced logic, memory, and three-dimensional device structures, while etching demand benefits from the rising number and complexity of patterning and material-removal steps. Each new process tool or process chamber can create additional point-of-use exhaust management requirements, making scrubber demand closely related to semiconductor equipment installation activity rather than wafer output alone.

Further opportunities are developing in specialty semiconductor processes, R&D and pilot lines, compound semiconductor production, and process environments where wastewater infrastructure or fuel supply is constrained. Dry Local Scrubber solutions can be particularly attractive when customers prioritize localized hazardous-gas control, modular installation, reduced water use, and simplified integration with existing facility exhaust systems. Suppliers that can develop gas-specific adsorbent formulations and provide rapid application engineering are better positioned to capture these process-specific opportunities.

Regional Insights

Asia Pacific is the largest and fastest-growing regional market for Dry Local Scrubber equipment, supported by its concentration of semiconductor manufacturing capacity and continued fab investment. China is a major growth engine: the market reached US$26.10 million in 2024, accounting for approximately 19.06% of global demand, and is projected to reach US$48.25 million by 2031, raising its share to approximately 21.95%. Continued wafer-fab expansion and semiconductor equipment localization are supporting demand for both international and domestic suppliers. Taiwan and South Korea maintain substantial and relatively stable requirements due to their advanced foundry and memory manufacturing bases, while Japan benefits from an established semiconductor production ecosystem and strong domestic semiconductor equipment capabilities.

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Regionalization of the semiconductor supply chain is also reshaping supplier strategies. Southeast Asia is gradually attracting additional semiconductor manufacturing and packaging-related investment, creating new equipment and service opportunities. India and other emerging semiconductor locations represent longer-term potential as manufacturing infrastructure develops. As customer locations become more geographically diversified, suppliers are increasingly required to establish regional service teams, consumables inventories, technical support, and local maintenance capabilities, accelerating a shift toward a regional manufacturing and localized service model.

Competitive Landscape Analysis

The Dry Local Scrubber market remains relatively concentrated, with the six largest suppliers accounting for nearly 78% of global market demand in 2024. Established international suppliers such as Ebara, Edwards Vacuum, CS Clean Solution, CSK, Global Standard Technology, Kanken Techno, and GnBS Eco benefit from long operating histories, accumulated gas-treatment know-how, established semiconductor customer relationships, broad installed bases, and mature field-service capabilities. Competition at the high end therefore extends beyond equipment specifications to include adsorption-media performance, process qualification history, safety record, maintenance capability, consumables availability, and global support infrastructure.

Chinese suppliers including Shanghai Brother Microelectronics Technology and PNC Process Systems are expanding their presence as semiconductor equipment localization progresses. Their near-term competitive opportunities are strongest in domestic fabs, mature process nodes, localized technical support, and cost-sensitive projects. As domestic suppliers accumulate installed-base experience and improve adsorbent development, system reliability, lifecycle management, and process qualification capabilities, competition in China is expected to intensify. The industry structure is therefore evolving from a market dominated primarily by established international vendors toward a more diversified competitive landscape combining global technology leaders with increasingly capable regional suppliers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Dry Local Scrubber Industry Forecast” looks at past sales and reviews total world Dry Local Scrubber sales in 2025, providing a comprehensive analysis by region and market sector of projected Dry Local Scrubber sales for 2026 through 2032. With Dry Local Scrubber sales broken down by

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region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Dry Local Scrubber industry.

This Insight Report provides a comprehensive analysis of the global Dry Local Scrubber landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Dry Local Scrubber portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Dry Local Scrubber market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dry Local Scrubber and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Dry Local Scrubber.

This report presents a comprehensive overview, market shares, and growth opportunities of Dry Local Scrubber market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Single Column

Double Column

Segmentation by Application:

CVD

Etching

Others

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia

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Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Ebara

Edwards Vacuum

CS Clean Solution

CSK(?????(?))

Global Standard Technology

Kanken Techno

GnBS Eco

UNISEM

Taiyo Nippon Sanso

KC Innovation

Air Water Mechatronics

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Triple Cores Technology

Integrated Plasma Inc (IPI)

Shanghai Brother Microelectronics Technology

PNC Process Systems

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dry Local Scrubber market?

What factors are driving Dry Local Scrubber market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Dry Local Scrubber market opportunities vary by end market size?

How does Dry Local Scrubber break out by Type, by Application?

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