

Global Gas-phase Odor Control Equipment Market Growth 2026-2032

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Abstracts

The global Gas-phase Odor Control Equipment market size is predicted to grow from US\$ 1585 million in 2025 to US\$ 2300 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Gas-phase Odor Control Equipment Industry Forecast" looks at past sales and reviews total world Gas-phase Odor Control Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Gas-phase Odor Control Equipment sales for 2026 through 2032. With Gas-phase Odor Control Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Gas-phase Odor Control Equipment industry.

This Insight Report provides a comprehensive analysis of the global Gas-phase Odor Control Equipment 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 Gas-phase Odor Control Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Gas-phase Odor Control Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Gas-phase Odor Control Equipment and breaks down the forecast by Treatment Technology, 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 Gas-phase Odor Control Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Gas-phase Odor Control Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Treatment Technology:

Biological Treatment

Wet Chemical Scrubbing

Adsorption / Dry Media

Thermal / Catalytic Oxidation

Other

Segmentation by System Configuration:

Packaged / Skid-mounted Units

Field-erected Systems

Mobile / Rental Filtration Systems

Integrated Collection and Treatment Systems

Segmentation by Target Odorant Group:

Sulfur Compounds

Nitrogen Compounds

Organic Odors / VOCs

Mixed Odor Streams

Segmentation by Application:

Municipal Wastewater and Sewer

Solid Waste and Organics Processing

Industrial Process Odor Control

Agriculture and Livestock

Other

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

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Gas-phase Odor Control Equipment market?
What factors are driving Gas-phase Odor Control Equipment market growth, globally and by region?

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

How do Gas-phase Odor Control Equipment market opportunities vary by end market size?

How does Gas-phase Odor Control Equipment break out by Treatment Technology, by Application?

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