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Global Local Scrubber Market Growth 2026-2032

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Abstracts

The global Local Scrubber market size is predicted to grow from US$ 1415 million in 2025 to US$ 2619 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Local scrubber absorbs and purifies pollutants in waste gas, such as acidic gases, volatile organic compounds (VOCs), particulate matter, etc. through liquid. Its working principle is to remove harmful components in waste gas by contacting the waste gas with liquid (such as water or specific chemical solution). After the waste gas enters the scrubber, the liquid spray reacts or adsorbs with the gas, so that the pollutants in the waste gas are absorbed, dissolved or neutralized, thereby purifying the waste gas. The treated purified gas can be safely discharged or further processed.

Key Findings

In 2025, the top five global manufacturers of semiconductor gas scrubbers will account for a combined revenue share of over 60%.Asia-Pacific represents the principal demand center, supported by concentrated semiconductor manufacturing investment across East Asia

CVD, diffusion and etching are the core applications due to their intensive use of hazardous and greenhouse process gases

Technology development is shifting toward lower energy consumption, higher gas removal efficiency and more intelligent equipment operation

Market Trends

The technology direction of Local Scrubber is moving from basic hazardous-gas

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treatment toward integrated control of environmental performance, energy consumption, process reliability and total cost of ownership. Conventional combustion-based treatment remains important for combustible gases and PFC-related exhaust streams, while plasma-based solutions are gaining importance where customers seek high destruction efficiency without relying heavily on hydrocarbon fuels. Equipment suppliers are also improving burner efficiency, plasma power modulation, catalyst-assisted treatment, particulate and by-product control, and real-time gas monitoring. At the same time, semiconductor fabs increasingly evaluate scrubbers as part of an integrated SubFab system together with dry vacuum pumps, exhaust piping and facility monitoring. This is raising requirements for equipment footprint, communication interfaces, preventive maintenance, operating-cycle extension and automatic cleaning. The transition toward advanced logic, 3D NAND, HBM and increasingly complex deposition and etching processes is expected to increase the diversity and loading of process exhaust, supporting continued development of higher-capacity and process-specific abatement solutions.

Market Dynamics

Drivers

Demand for Local Scrubber is fundamentally linked to semiconductor fab construction, wafer-fab equipment investment and process intensity. Growth in AI infrastructure, advanced logic, memory and high-bandwidth memory is stimulating additional semiconductor manufacturing capacity and more intensive use of deposition, etching and related processes. These processes consume gases such as NF3, SF6, CF4, SiH4, WF6, BCl3 and Cl2, creating requirements for safe and effective downstream treatment. Environmental compliance is another structural driver because semiconductor fabs must control toxic gases, flammable gases, corrosive compounds and greenhouse-gas emissions while maintaining workplace safety and production continuity. Gas scrubbers therefore represent critical supporting equipment rather than discretionary environmental investment, with demand increasingly tied to both new fab installations and capacity expansions or process-tool upgrades. Global semiconductor equipment sales reached a new record in 2025, providing a favorable underlying equipment-investment environment for semiconductor SubFab systems.

Restraints

The main restraint is the relatively high lifecycle cost associated with installation, utilities, consumables and maintenance. Semiconductor exhaust streams can generate

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corrosive compounds, powders and reaction by-products that cause clogging, corrosion or declining treatment efficiency, requiring periodic chamber cleaning, replacement of consumables and specialized technical service. Burn Scrubbers may require fuel and cooling water, Plasma Scrubbers consume significant electrical power, while wet-treatment configurations create wastewater-management requirements. Product qualification is also demanding because failure of abatement equipment can affect production-tool uptime, EHS compliance and fab safety. Consequently, semiconductor manufacturers generally favor equipment with proven process compatibility and service capability, creating relatively high qualification barriers for new suppliers.

Opportunities

The principal opportunity lies in the combination of global semiconductor capacity expansion and increasingly stringent carbon-reduction requirements. New fabs provide opportunities not only for initial equipment installation but also for long-term maintenance, spare parts, consumables and equipment upgrades. Advanced processes create additional opportunities for high-flow, high-load and multi-gas treatment systems, while carbon-neutrality targets are encouraging development of electric plasma, low-fuel combustion, catalytic and energy-optimized technologies. Mainland China also represents an important opportunity as expansion of the domestic semiconductor equipment supply chain increases demand for locally manufactured SubFab equipment. Suppliers capable of combining competitive acquisition cost with verified treatment performance, local engineering response and stable maintenance support are positioned to benefit from localization.

Challenges

The industry faces a continuing need to balance destruction and removal efficiency, equipment uptime, energy consumption and maintenance cost. Gas compositions can differ substantially among CVD, diffusion and etching processes, while advanced-node process changes introduce new precursors and increasingly complex reaction by-products. A technology that performs well for one gas stream may therefore not provide an optimal solution for another. Suppliers must continuously conduct process validation and equipment redesign while supporting installed systems in customer fabs. In addition, semiconductor investment remains cyclical and geographically concentrated, exposing equipment suppliers to fluctuations in fab capital expenditure, export-control policies and individual customer investment schedules. Maintaining local service teams and spare-parts inventories across major semiconductor manufacturing regions also increases operating complexity.

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Industry Chain Analysis

The upstream of the Local Scrubber industry consists primarily of stainless steel and corrosion-resistant structural materials, burners and plasma generators, heaters, pumps, valves, sensors, mass-flow and pressure-control components, catalysts, adsorption materials, PLC/control systems and other electrical components. Midstream manufacturers integrate these components according to process-gas chemistry and customer specifications, with core value creation concentrated in reaction-chamber design, gas decomposition and neutralization technology, by-product control, corrosion management, safety control algorithms and process matching. The downstream market consists mainly of semiconductor fabs and process-equipment ecosystems associated with deposition, diffusion, etching, cleaning and related processes. Compared with general industrial gas treatment systems, semiconductor scrubbers require much closer integration with process tools and fab operation. As a result, profitability and customer retention depend not only on equipment sales but also on qualification experience, installed-base service, spare parts, consumables, preventive maintenance and technology upgrades over the equipment lifecycle.

Segment Insights

By product type, Burn Scrubber remains an important technical route because combustion or thermal oxidation can effectively treat combustible gases and a broad range of PFC-related process gases, making it suitable for multiple CVD, diffusion and etching applications. Plasma Scrubber is becoming increasingly important as semiconductor manufacturers seek high destruction efficiency for gases such as CF4, SF6, NF3 and N2O together with reduced dependence on fossil-fuel combustion. Heat Wet Scrubber combines thermal treatment with subsequent wet-stage removal of reaction products and is particularly valuable where complex gas decomposition and secondary by-product capture are both required. Dry Scrubber relies primarily on adsorption or chemical reaction media and offers advantages in applications where wastewater generation needs to be minimized or specific toxic and corrosive gases can be efficiently captured by solid media. The market is therefore expected to remain characterized by multiple coexisting technologies rather than convergence toward a single scrubber architecture.

Downstream Market Opportunities

CVD represents one of the most important downstream applications because deposition processes can involve SiH4, NF3, WF6, B2H6, TEOS, TDMAT, N2O and hydrocarbon

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gases, creating a combination of toxicity, flammability, greenhouse-gas emissions and solid reaction by-products. Diffusion processes similarly use gases such as SiH4, DCS, NH3, ClF3 and B2H6, placing high requirements on combustion safety, corrosion control and by-product management. Etching processes using CF4, SF6, BCl3, Cl2 and HBr create demand for efficient treatment of fluorinated greenhouse gases as well as corrosive halogen compounds. Future opportunities are particularly strong where advanced logic, memory and three-dimensional device structures increase deposition and etch process steps per wafer, because greater process complexity tends to increase both exhaust-gas volumes and the diversity of gases requiring abatement. Wet cleaning and other specialty processes provide additional opportunities for process-specific compact point-of-use systems.

Regional Insights

Asia-Pacific is the principal demand region for Local Scrubber because semiconductor manufacturing investment is highly concentrated in mainland China, Taiwan, South Korea and Japan. Taiwan and South Korea are particularly important for advanced logic, foundry and memory investment, while mainland China continues to expand domestic semiconductor production capacity and the local semiconductor equipment supply chain. This combination supports demand for both internationally established systems and increasingly competitive domestic abatement equipment. North America is supported by investment in advanced logic, memory and new fab capacity, with customers placing strong emphasis on EHS compliance, high equipment availability and lifecycle service. Europe represents a comparatively smaller manufacturing base but maintains demand in advanced semiconductor, power semiconductor, automotive semiconductor and specialty-device facilities, where environmental standards and operating reliability support adoption of higher-specification exhaust abatement systems. The regional competitive environment is therefore increasingly influenced by local manufacturing presence, customer qualification, engineering support and speed of maintenance response.

Competitive Landscape Analysis

The Local Scrubber market has a relatively concentrated competitive structure, with the five largest manufacturers accounting for nearly 63% of global revenue in 2024 according to this study. Major participants include Edwards Vacuum, Ebara, Global Standard Technology, CSK, Kanken Techno, UNISEM, EcoSys, YOUNGJIN IND, GnBS Eco, DAS Environmental Expert, CS Clean Solution and an expanding group of Chinese suppliers. Established international and Korean/Japanese manufacturers

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generally benefit from long-term process qualification, broad product portfolios, large installed bases and mature global service networks. Their competitive advantages increasingly extend beyond gas destruction efficiency to equipment uptime, process-tool integration, energy consumption and lifecycle operating cost. Meanwhile, Chinese suppliers including Shanghai Sheng Jian Environment and other domestic semiconductor auxiliary-equipment manufacturers are expanding local product and service capability as mainland semiconductor fabs strengthen localization of SubFab equipment. Competition is therefore gradually evolving from product-level price competition toward a combined assessment of process performance, qualification history, total cost of ownership, localization capability and long-term service responsiveness.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global 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 Local Scrubber portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Local Scrubber market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 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 Local Scrubber.

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

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Market Segmentation

Segmentation by Type:

Burn Scrubber

Plasma Scrubber

Heat Wet Scrubber

Dry Scrubber

Segmentation by Application:

CVD (SiH4, NF3, WF6, B2H6, TEOS, TDMAT, N2O, C3H6, Etc.)

Diffusion (SiH4, TEOS, DCS, NH3, ClF3, B2H6, Etc.)

Etch (CF4, SF6, BCl3, Cl2, HBr, Etc.)

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

Edwards Vacuum

Ebara

Global Standard Technology

CSK(?????(?))

Kanken Techno

UNISEM

EcoSys

YOUNGJIN IND

GnBS Eco

DAS Environmental Expert GmbH

Shanghai Sheng Jian Environment

CS Clean Solution

Beijing Jingyi Automation Equipment

Integrated Plasma Inc (IPI)

Triple Cores Technology

Busch Vacuum Solutions

Taiyo Nippon Sanso

Advanced Micro-Fabrication Equipment

Shanghai Shareway Environment Technology

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KC Innovation(?KC?????)

Zhejiang ASH Semiconductor Equipment

Key Questions Addressed in this Report

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

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

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

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

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

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