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Marine Scrubber Market: Current Analysis and Forecast (2025-2033)

https://marketpublishers.com/r/M7BFAAF51165EN.html
Date: April 2025
Pages: 134
Price: US$ 3,999.00 (Single User License)
ID: M7BFAAF51165EN

Abstracts

Marine Scrubbers or Exhaust Cleaning Systems are used on ships to reduce the harmful emissions coming from their exhaust gases. It exists in several forms: open-loop systems, closed-loop systems, and a combination of the two, known as hybrid systems with different operating features and environments. Adding to this, scrubbers mainly target the sulfur oxides (SOx) and nitrogen oxides (NOx) pollutants that are produced as byproducts of burning marine fuels. Moreover, marine scrubber systems eliminate the particulate matter and neutralize acidic pollutants by passing exhaust fumes through the scrubbing medium, like saltwater or an alkaline solution.

The Marine Scrubber Market is expected to grow with a significant CAGR of 12.23% during the forecast period (2025- 2033F). The increasing maritime trade, implementation of stringent environmental regulations, and the rising adoption of emission control technologies across the maritime sector are all contributing factors to the marine scrubber market. Further constant evolution of scrubber technologies is creating eco-friendlier and effective systems, making it a better choice for the maritime sector. Further, the utilization of scrubbers enhances the cost efficiency as it allows the ships to use cheaper high-sulfur content fuels while meeting the emission standards. For shipping companies, this financial advantage is a major incentive. The necessity for marine scrubbers to adhere to pollution regulations has increased as a result of a larger fleet of ships brought about by growing international trade. Additionally, incentives and subsidies to its manufacturers in some countries catalyze its growth. Furthermore, the expansion of marine trade is also influenced by the building and development of vital economic routes, such as the Panama Canal, the Suez Canal, and the Arctic shipping lanes. In addition to abiding by the law, many shipping companies have made the transition to eco-friendly operations as a result of mounting pressure from stakeholders, the general public, and environmental organizations. For instance, on February 17,

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2022, Valmet tested a first-of-a-kind scrubber and wet electrostatic precipitator combination and cut exhaust gas emissions in a marine diesel engine by up to 99%. The solution could allow shipping companies to lower their particulate matter and black carbon emission levels, tackle global warming, and comply with tightening regulations.

Based on technology type, the market is segmented into wet technology and dry technology. Among these, the wet technology marine scrubber market has the largest share in the marine scrubber market, owing to its high efficiency in reducing sulphur oxides. Further, wet scrubbers are an efficient and environmentally responsible product, adhering to strict requirements by using water or an alkaline solution to absorb and neutralize sulfur oxides (SOx) from exhaust fumes. The shipping industry has proliferated the use of wet scrubbers abiding by the IMO's strict sulphur emission rules. These scrubbers offer a financially feasible substitute to the ships that want to continue using traditional high-sulfur fuel while still adhering to regulations, hence being cost-efficient. Wet scrubbers are therefore highly recommended, especially for large boats, as they ensure a lower environmental impact and align with global sustainability goals.

Based on application, the market is segmented into bulk carriers, container ships, and others. Among these, the largest portion of global revenue in 2024 came from the bulk carriers and has become the most successful. Due to several important variables, the bulk containers segment led the application segment. Bulk carriers are typically exported abroad, accounting for a sizeable portion of the world's marine trade. Each enormous bulk cargo ship transports millions of tons of grains, ores, and raw materials. To help bulk container ships comply with environmental standards and increase their operational efficiency, scrubbers are now frequently added to reduce sulfur oxides (SOx) in exhaust gases. This pattern is especially more noticeable in the bulk cargo transportation sector, which became the market's largest segment because of the sizeable scrubber population. On April 7, 2021, VDL AEC Maritime successfully installed, commissioned, and handed over 24 exhaust gas cleaning systems (scrubbers) for Maran Dry Management and installed units on board the Thenamaris tankers.

Based on installation, the market is segmented into new build and retrofit. In 2024, the retrofit segment dominated the market as the existing ships are being retrofitted to comply with increasingly stringent environmental regulations. The inflating demand for retrofit installations is propelled by the need for cost-effective compliance solutions and the increasing focus on reducing the

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environmental impact of maritime operations. The installation process of the scrubber is complex, which requires careful planning, scheduled maintenance periods, and proper vigilance. Retrofit installation empowers the shipowners to continue using cost-effective high-sulphur fuels, supporting sustainability goals, and contributing to cleaner air.

For a better understanding of the market, the growth of the Marine Scrubber market is analyzed based on their worldwide demand in regions such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, France, U.K., Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, Rest of Asia-Pacific), Rest of World. Asia-Pacific is expected to grow with a significant CAGR during the forecast period, due to the integration of regulatory, economic, and environmental factors. Adding to this, technological advancements, including the development of hybrid scrubber systems, have further enhanced their appeal by offering flexibility and efficiency. The implementation of stringent environmental regulations, such as the International Maritime Organization's (IMO) sulphur cap, compelled the shipowners of the Asia-Pacific region to adopt scrubber systems, as the region experiences a high volume of maritime trade and shipping activities. The region's strong maritime trade, along with the heightening investments in sustainable shipping initiatives, underscores the rising demand for marine scrubbers. In addition, the propagating awareness of environmental sustainability and the obligation of diminishing the impact of maritime transportation on air quality and marine ecosystems has catalyzed the adoption of these systems. These factors collectively contribute to the market's expansion, positioning Asia-Pacific as a key player in the global marine scrubber industry. For instance, on April 22, 2024, Mitsui O.S.K. Lines, Ltd. announced to equip its LR1 product tanker Nexus Victoria (75,000 DWT class) with the "Filtree System," an onboard CO2 capture system with a SOx scrubber manufactured by Value Maritime B.V. (VM). This marks the first time a Japanese operator has commercially installed a CO2 capture system onboard a vessel.

Some of the major players operating in the market include Alfa Laval AB, ANDRITZ, Fuji Electric Co., Ltd., MITSUBISHI HEAVY INDUSTRIES, LTD., Saacke GmbH, CR Ocean Engineering, Pacific Green, Wartsila, PureteQ, and VDL AEC Maritime B.V.

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