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Global NDIR End Point Detector for Chamber Clean 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 NDIR End Point Detector for Chamber Clean market size was valued at US$ 25.34 million in 2025 and is forecast to a readjusted size of US$ 45.24 million by 2032 with a CAGR of 8.7% during review period.

An NDIR (Non-Dispersive Infrared) End Point Detector for chamber clean applications is a gas-sensing device used to precisely detect the end point of a plasma or thermal cleaning process inside semiconductor processing chambers. These detectors monitor specific infrared-absorbing gases, such as SiF4, CF?, etc. that are released during chamber cleaning, and determine when the residue (such as polymer buildup from previous etching or deposition steps) has been fully removed.

Chemical vapor deposition (CVD) is a chemical process in which a volatile precursor reacts with the wafer to deposit a conformal film of material on the wafer. These films include polysilicon, silicon dioxide, silicon nitride, and other silicon-based materials. CVD not only deposits highly uniform films on the wafer, but also on chamber surfaces. Over time, deposits accumulate on chamber surfaces, leading to particulate matter and potential contamination, which reduces wafer yield. To reduce particulate matter from deposition on chamber walls, the chamber must be cleaned regularly to remove the buildup. Removal of chamber deposits is achieved by introducing reactive gases, such as fluorine radicals. These radicals react with the surface film to generate gases such as silicon tetrafluoride and carbon tetrafluoride, which are then removed from the chamber.

The optimal chamber cleaning time is a complex function of a number of variables,

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including the thickness of the deposited material, temperature, pressure, reactive gas delivery, and material chemistry. Traditional chamber cleaning is a time-based process. Due to the complexity of the chamber environment, cleaning rate variables may change or drift. A single cleaning time for a given chamber can vary significantly over time. Therefore, a uniform cleaning time cannot meet all chamber cleaning requirements. Most time-based processes are designed to over-clean to ensure complete removal of CVD films from multiple chambers. Over-cleaning reduces wafer throughput, causes excessive use of reactive gases, and can damage chamber walls. Conversely, under-cleaning causes the deposited film to accumulate over time, generating particles, which ultimately reduces product yield.

The NDIR End Point Detector for Chamber Clean determines optimal chamber cleanliness by directly measuring the amount of silicon tetrafluoride or carbon tetrafluoride generated. This dynamic approach eliminates the uncertainty of time-based methods. Furthermore, the NDIR End Point Detector for Chamber Clean can save costs, reduce cleaning time and reactive gas usage, and extend chamber life.

According to the World Integrated Circuit Association (WICA), the global semiconductor market size is expected to reach US$620.2 billion in 2024, a year-on-year growth of 17%. The market for NDIR End Point Detectors for Chamber Clean (NDIR EPDs) is rapidly growing, driven by advances in semiconductor manufacturing technology and increased spending on wafer fab equipment. According to our data, global shipments of NDIR chamber cleaning endpoint detectors will reach approximately 1,700 units in 2024, and global shipments are projected to grow at a compound annual growth rate exceeding 12% over the next five years. Key players in the NDIR EPDs for Chamber Clean market include MKS Inc., HORIBA, Teledyne API, and Sifang Optoelectronics. High-end products in the industry are dominated by manufacturers in the United States and Japan. To reduce reliance on imported technology and products, domestic manufacturers are actively pursuing independent research and development and technological breakthroughs. Domestic NDIR EPDs for Chamber Clean are gradually meeting domestic demand, and the process of domestic substitution is accelerating.

From a regional perspective, North America (the United States) and the Asia-Pacific region (particularly Japan, South Korea, and China), as the two most important global CVD equipment production regions, have strong demand for NDIR EPDs for Chamber Clean. North America will account for over 45% of the market share in 2024. China will see the fastest growth, with our data projecting sales in China to increase by over 20% year-over-year in 2024.

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With the overall improvement in the semiconductor industry's economic climate, the global semiconductor equipment market is experiencing rapid growth. Furthermore, as semiconductor production lines continue to upgrade, wafer fabs' demand for the quantity and performance of thin-film deposition equipment will continue to increase, driving the expansion of the NDIR End Point Detector for Chamber Clean market.

This report is a detailed and comprehensive analysis for global NDIR End Point Detector for Chamber Clean 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 NDIR End Point Detector for Chamber Clean market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global NDIR End Point Detector for Chamber Clean market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global NDIR End Point Detector for Chamber Clean market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global NDIR End Point Detector for Chamber Clean market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (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 NDIR End Point Detector for Chamber Clean

To forecast future growth in each product and end-use market

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To assess competitive factors affecting the marketplace

This report profiles key players in the global NDIR End Point Detector for Chamber Clean 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 MKS Inc., HORIBA, Teledyne API, Cubic Instruments, etc.

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

Market Segmentation

NDIR End Point Detector for Chamber Clean 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

Single Gas Detection Type

Multi-gas Detection Type

Market segment by Application

PECVD

Others

Major players covered

MKS Inc.

HORIBA

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Teledyne API

Cubic Instruments

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:

Chapter 1, to describe NDIR End Point Detector for Chamber Clean product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of NDIR End Point Detector for Chamber Clean, with price, sales quantity, revenue, and global market share of NDIR End Point Detector for Chamber Clean from 2021 to 2026.

Chapter 3, the NDIR End Point Detector for Chamber Clean competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the NDIR End Point Detector for Chamber Clean 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.

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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 NDIR End Point Detector for Chamber Clean 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 NDIR End Point Detector for Chamber Clean.

Chapter 14 and 15, to describe NDIR End Point Detector for Chamber Clean sales channel, distributors, customers, research findings and conclusion.

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