

# Global Pumps for Semiconductor Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Pumps for Semiconductor market size is expected to reach \$ 4412 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032). Pumps for Semiconductor refers to specialized pumps that adapt to the entire process requirements of semiconductor front-end wafer manufacturing, back-end packaging and testing, and plant operation and maintenance. They possess core technical characteristics such as high cleanliness, strong corrosion resistance, high precision control, low vibration, and low leakage, and are used for establishing vacuum environments or transporting process fluids/utility media.

The Pumps for Semiconductor market is fundamentally the productivity infrastructure underpinning yield and tool uptime. In wafer-fab front-end processes, vacuum systems determine whether critical steps such as etch, thin-film deposition, and ion implantation can be executed within low-contamination conditions and within stable pressure and controllable pumping-speed process windows. On the facilities side, the conveyance of ultrapure water (UPW), process chemicals, and waste streams directly affects line continuity and EHS compliance. Because pumps are characterized by ?equipment qualification/customer certification, tight coupling to process windows, and strong dependence on on-site service,? switching costs are materially higher than for typical electromechanical components. As a result, competition has long centered on ?high reliability, low contamination, low total cost of ownership (TCO), and service-network capability.?

Pump demand is highly correlated with WFE and fab CapEx cycles, and is reflected through two channels: ?new tool installations? and ?the installed base (service, overhaul, and refurbishment).? The high-end vacuum pump segment remains oligopolistic. Edwards has been part of Atlas Copco since 2014; Pfeiffer Vacuum has also clearly positioned itself externally as a member of the Busch Group and, in 2024, upgraded its branding to ?Pfeiffer Vacuum+Fab Solutions.? Among Japanese suppliers,

EBARA has publicly stated that it holds a leading global position in dry vacuum pumps for semiconductor applications.

Downstream applications and technology choices exhibit clear ?scenario-based segmentation.? For front-end core tools (etch, CVD/PVD, ion implantation, etc.), the mainstream configuration is typically a combined vacuum system of ?dry backing pump + turbomolecular pump (or other high-vacuum pump).? At advanced nodes and vibration-sensitive applications, magnetic-levitation and other low-vibration solutions are being adopted more rapidly; for example, EBARA?s magnetically levitated turbomolecular pumps claim sub-nanometer vibration levels to meet EUV-related requirements, while Osaka Vacuum has also demonstrated its technology roadmap for ultra-low-vibration turbomolecular pump series. In back-end packaging/test and certain mature-node applications, selection tends to balance cost and maintainability: dry claw pumps/screw pumps and rotary-vane pumps (with oil-mist filtration) coexist, with demand driven more by capacity build-out and equipment renewal.

In facilities and wet-process domains, ?non-vacuum pumps? are more strongly governed by materials and duty conditions. UPW and chemical delivery emphasize control of metal-ion leaching, corrosion resistance, low shear, and leak/safety performance. Accordingly, magnetic-levitation and bearingless concepts are gaining penetration in high-purity chemical delivery and microelectronics wet processes. Levitronix, for instance, positions its solutions around ?no mechanical bearings, no seal wear, a magnetically levitated impeller, and chemically resistant high-purity polymer pump heads? for semiconductor chemical and wet applications.

Overall, advanced logic and advanced packaging are driving vacuum systems toward ?lower vibration, higher reliability, stronger corrosion resistance, and easier maintenance.? The continued premiumization of turbomolecular and dry vacuum pumps, together with a rising share of service revenue, is therefore expected to persist. This report studies the global Pumps for Semiconductor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pumps for Semiconductor and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Pumps for Semiconductor that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Pumps for Semiconductor total production and demand, 2021-2032, (Units)

Global Pumps for Semiconductor total production value, 2021-2032, (USD Million)

Global Pumps for Semiconductor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Pumps for Semiconductor consumption by region & country, CAGR, 2021-2032

& (Units)

U.S. VS China: Pumps for Semiconductor domestic production, consumption, key domestic manufacturers and share

Global Pumps for Semiconductor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Pumps for Semiconductor production by Function, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Pumps for Semiconductor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Pumps for Semiconductor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Edwards Vacuum (Atlas), Ebara Corporation, Pfeiffer Vacuum+Fab Solutions (Busch), Kashiyama Industries, SKY Technology Development, Beijing Grand Hitek, Shanghai Hanbell Precise Machinery Co., Ltd, Ningbo Baosi Energy Equipment, LOTVACUUM, Taiko Kikai Industries, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Pumps for Semiconductor market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Pumps for Semiconductor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Pumps for Semiconductor Market, Segmentation by Function:

Vacuum Pumps

Non-vacuum Pumps (Fluid Transfer Pumps)

### Global Pumps for Semiconductor Market, Segmentation by Pump:

Claw Vacuum Pump

Scroll Vacuum Pump

Roots Vacuum Pump

Screw Vacuum Pump

Turbomolecular Pump

Cryo Vacuum Pump

AODD Pump

Diaphragm Metering Pump

Others

### Global Pumps for Semiconductor Market, Segmentation by Application:

Thin Film Deposition Equipment

Etching Equipment

Ion Implantation Equipment

Coating & Developing Equipment

Post-Processing Equipment

Facility Management Equipment

### **Companies Profiled:**

Edwards Vacuum (Atlas)

Ebara Corporation

Pfeiffer Vacuum+Fab Solutions (Busch)

Kashiyama Industries

SKY Technology Development

Beijing Grand Hitek

Shanghai Hanbell Precise Machinery Co., Ltd

Ningbo Baosi Energy Equipment

LOTVACUUM

Taiko Kikai Industries

SHI Cryogenics

EVP Vacuum Technology

Scroll Laboratories, Inc

ULVAC, Inc

Highvac Corporation

Osaka Vacuum, Ltd

Shimadzu Corporation

KYKY Vacuum

Shanghai Canter Vacuum Technology

Tianjin Feixuan Technology

Sino Multi-Micro Technology Co., Ltd

PSG Dover

IDEX Corporation

YAMADA

IWAKI

YTS Japan

White Knight Fluid Handling

Argal Srl

Bueno Technology

Dellmeco GmbH

Levitronix

Zhejiang Cheer

Wuxi Shengyi

Panther Tech

Ningbo Genius-Converging

Suzhou Supermag

Shenzhen Sicarrier

Zhejiang Scnict

Agilent Technologies

Hefei Yuchi Vacuum Technology

**Key Questions Answered:**

1. How big is the global Pumps for Semiconductor market?
2. What is the demand of the global Pumps for Semiconductor market?
3. What is the year over year growth of the global Pumps for Semiconductor market?
4. What is the production and production value of the global Pumps for Semiconductor market?
5. Who are the key producers in the global Pumps for Semiconductor market?
6. What are the growth factors driving the market demand?

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