

# Global Slurry Recycling System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Slurry Recycling System market size was valued at US\$ 190 million in 2025 and is forecast to a readjusted size of US\$ 349 million by 2032 with a CAGR of 8.7% during review period.

Slurry Recycling System refers to a process-integrated recycling system used in semiconductor wafer slicing, grinding, polishing and CMP processes to recover and reuse valuable components from spent slurry, including silicon particles, abrasive grains, coolants, ultrapure water and chemical ingredients. Depending on the process, the system may use centrifugation, filtration, ultrafiltration, chemical spiking and automated re-supply to convert waste slurry or silicon-containing wastewater into reusable process media, thereby reducing slurry consumption, water consumption, waste treatment cost and environmental load.

Slurry Recycling System is a process-integrated recycling system embedded in wafer processing, CMP, polishing, grinding, lapping, back grinding, dicing and other manufacturing steps. Systems represented by IHI are more focused on the recovery of silicon particles, abrasive grains, coolants and water generated during wafer slicing, grinding and hard-and-brittle material processing. Systems represented by PUE, F?th/HighQ and MFC Technology are more oriented toward CMP or polishing slurry reclamation, including filtration, composition monitoring, chemical make-up/spiking and re-supply. Nomura Micro Science and Kanadevia, meanwhile, are more focused on silicon-containing wastewater, post-lapping slurry and the recovery of reusable abrasive grains.

From the perspective of market applications, Slurry Recycling Systems currently serve

three main customer scenarios. The first is semiconductor wafer and hard-and-brittle material processing plants, covering wafer slicing, edge grinding, grinding, polishing, thinning, lapping and other processes. In these applications, customers are mainly concerned with reducing the loss of silicon kerf, abrasive grains, coolants and water, while also reducing the treatment burden of silicon-containing wastewater and abrasive-containing waste liquids. The second is CMP processes in wafer fabs, including logic, memory, power devices, CIS, MEMS, analog ICs and advanced packaging-related wafer manufacturing. CMP slurry is a high-consumption and high-cost process material, and the spent slurry also contains abrasive particles, oxidizers, complexing agents, stabilizers and residues from metal or dielectric materials. Therefore, the core motivation for fabs to adopt slurry recycling systems is to reduce fresh slurry procurement costs, lower waste liquid treatment costs, and reduce the load on ultrapure water and wastewater treatment systems in regions with water-resource constraints. The third application area includes solar wafers, sapphire, quartz, glass substrates, GaAs/compound semiconductors, FPDs and other hard-and-brittle material processing scenarios. These processes also generate large volumes of particle-containing waste liquids, and the economic value of recycling systems is mainly reflected in water reuse, abrasive reuse, solid-particle resource recovery and environmental compliance. Overall, this product is not a standardized tool required for every wafer fab production line. Instead, it is a customized, project-based system closely linked to the customer's process flow, waste liquid composition, environmental treatment cost, slurry price, water-use constraints and facility system design.

Looking ahead, the growth drivers for Slurry Recycling Systems mainly come from the combined requirements of semiconductor manufacturing cost reduction, green manufacturing and resource circularity. As advanced nodes, mature specialty processes, power semiconductors, CIS, MEMS, advanced packaging and high-end wafer manufacturing continue to expand, the number of CMP, polishing and grinding steps will increase, driving slurry consumption and waste liquid loads upward. As a result, slurry recycling systems are expected to move beyond their previous role as an end-of-pipe environmental treatment solution and gradually become a production-side COO optimization tool.

This report is a detailed and comprehensive analysis for global Slurry Recycling System market. Both quantitative and qualitative analyses are presented by company, by region & country, by Technical Route 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 Slurry Recycling System market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Slurry Recycling System market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Slurry Recycling System market size and forecasts, by Technical Route and by Application, in consumption value (\$ Million), 2021-2032

Global Slurry Recycling System market shares of main players, in revenue (\$ Million), 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 Slurry Recycling System

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

To assess competitive factors affecting the marketplace

This report profiles key players in the global Slurry Recycling System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IHI Rotating Machinery Engineering Co., Ltd, PUE Systems, F?th GmbH, Nomura Micro Science Co., Ltd, MFC Technology Co., Ltd, Kanadevia Corporation, etc.

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

Market segmentation

Slurry Recycling System market is split by Technical Route and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Technical Route and by Application. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Technical Route

Centrifugal Slurry Recycling System

Filtration-based Slurry Recycling System

#### Market segment by Process

Wafer Slicing/Grinding Slurry Recycling System

CMP/Polishing Slurry Recycling System

Silicon Wastewater/Particle Recovery System

#### Market segment by Application

Semiconductor

PV

#### Market segment by players, this report covers

IHI Rotating Machinery Engineering Co., Ltd

PUE Systems

F?th GmbH

Nomura Micro Science Co., Ltd

MFC Technology Co., Ltd

## Kanadevia Corporation

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Slurry Recycling System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Slurry Recycling System, with revenue, gross margin, and global market share of Slurry Recycling System from 2021 to 2026.

Chapter 3, the Slurry Recycling System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Technical Route and by Application, with consumption value and growth rate by Technical Route, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Slurry Recycling System market forecast, by regions, by Technical Route and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Slurry Recycling System.

Chapter 13, to describe Slurry Recycling System research findings and conclusion.

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