

Global Slurry Recycling System Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Slurry Recycling System market size is predicted to grow from US\$ 181 million in 2025 to US\$ 342 million in 2032; it is expected to grow at a CAGR of 9.2% from 2026 to 2032.

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.

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

This Insight Report provides a comprehensive analysis of the global Slurry Recycling System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Slurry Recycling System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Slurry Recycling System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Slurry Recycling System and breaks down the forecast by Technical Route, 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 Slurry Recycling System.

This report presents a comprehensive overview, market shares, and growth opportunities of Slurry Recycling System market by product type, application, key players and key regions and countries.

Segmentation by Technical Route:

Centrifugal Slurry Recycling System

Filtration-based Slurry Recycling System

Segmentation by Process:

Wafer Slicing/Grinding Slurry Recycling System

CMP/Polishing Slurry Recycling System

Silicon Wastewater/Particle Recovery System

Segmentation by Application:

Semiconductor

PV

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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 analyzing the company's coverage, product portfolio, its market penetration.

IHI Rotating Machinery Engineering Co., Ltd

PUE Systems

F?th GmbH

Nomura Micro Science Co., Ltd

MFC Technology Co., Ltd

Kanadevia Corporation

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