

Global Chemical Mechanical Planarization Market Size study & Forecast, by Equipment (CMP Equipment and CMP Consumable) by Application (Integrated Circuits and Automotive) and Regional Forecasts 2022-2032

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Abstracts

The Global Chemical Mechanical Planarization (CMP) Market is valued at approximately USD 6.3 billion in 2024 and is projected to grow at a CAGR of 7.2% over the forecast period 2025–2035. CMP technology is an essential process in semiconductor manufacturing, used to achieve precise wafer planarization and surface uniformity. This technique combines chemical slurry and mechanical abrasion to remove excess materials, enabling the production of high-performance integrated circuits and advanced automotive electronics components. The market expansion is driven by the proliferation of semiconductor fabrication, increased demand for miniaturized ICs, and the growing adoption of electric vehicles requiring sophisticated automotive chips. Additionally, innovations in slurry formulations, pad materials, and automation of CMP equipment are enhancing process efficiency, quality, and throughput, further fueling market growth.

Rising investments in semiconductor fabrication facilities, along with the ongoing trend of automotive electrification, have significantly boosted the demand for both CMP equipment and consumables. Integrated circuit manufacturers increasingly rely on advanced CMP solutions to meet tighter design rules and reduce defect rates. Furthermore, as industries pursue Industry 4.0 initiatives, manufacturers are leveraging automated CMP tools integrated with real-time monitoring and predictive maintenance software. However, high capital expenditure for CMP equipment and complex process optimization requirements may present adoption challenges for small and medium-scale fabs over the forecast period.

The detailed segments and sub-segments included in the report are:

By Equipment:

CMP Equipment

CMP Consumable

By Application:

Integrated Circuits

Automotive

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

CMP Equipment is Expected to Dominate the Market

CMP equipment holds the largest market share due to its pivotal role in achieving high precision wafer planarization and ensuring process repeatability. This segment benefits from continuous advancements in automation, process control, and tool reliability, which are crucial for high-volume semiconductor manufacturing. The equipment segment's

growth is further reinforced by escalating investments in semiconductor fabs and demand for cutting-edge automotive electronic components requiring precise planarization. While CMP consumables contribute significantly to overall consumption, equipment remains the core driver of market adoption.

CMP Consumables Lead in Revenue Contribution

Although CMP equipment dominates in units, CMP consumables—including slurries, pads, and polishing solutions—currently contribute the highest revenue due to their recurring nature and critical role in process efficacy. Advanced consumable formulations tailored for different materials and applications ensure superior defect control, surface finish, and throughput, which translates to sustained revenue generation. As semiconductor and automotive electronics manufacturing grows increasingly complex, the need for high-quality consumables continues to accelerate, reinforcing this segment's strong revenue performance.

North America is a major market for CMP solutions, benefiting from a robust semiconductor and automotive electronics ecosystem, strong R&D infrastructure, and high adoption of advanced fabrication technologies. Asia Pacific is poised to witness the fastest growth during the forecast period, driven by expanding semiconductor fabs, rapid automotive electronics adoption, and supportive government initiatives in countries such as China, India, and Japan. Europe maintains a steady presence, supported by mature semiconductor and automotive industries and continued investments in process optimization and automation.

Major market players included in this report are:

Applied Materials, Inc.

Tokyo Electron Limited

Lam Research Corporation

Hitachi High-Technologies Corporation

Fujimi Incorporated

Ebara Corporation

Cabot Microelectronics Corporation

Entegris, Inc.

Dow Inc.

Versum Materials, Inc.

3M Company

Brewer Science, Inc.

Sumitomo Chemical Co., Ltd.

JSR Corporation

Panasonic Corporation

Global Chemical Mechanical Planarization Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments and countries

in recent years and to forecast their values for the coming decade. The report incorporates both qualitative and quantitative analyses within the regions studied. It also provides detailed insights into market drivers, challenges, and emerging opportunities. Moreover, it delivers a comprehensive assessment of the competitive landscape, highlighting the product offerings and strategic initiatives of key players.

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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