

# Global CMP Slurry for ILD and STI Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on CMP Slurry for ILD and STI competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Chemical mechanical polishing/planarization (CMP) is a process widely used in the microelectronic industries to smooth surfaces with the combination of chemical and mechanical forces. This process uses an abrasive and corrosive slurry to help planarize the surface of a wafer. The particle size distribution of the slurry is a critical parameter controlling the success of the planarization process. Cerium oxide (ceria) based slurries are becoming more widely used in a variety of CMP applications for integrated circuit (IC) manufacturing. This report studies the CMP Slurry for STI & ILD. Key CMP Slurry is Ceria CMP Slurry and colloidal silica CMP slurry, typical Ceria slurry products are Resonac's HS series ceria slurry, and AGC's CES-300 series, CES-330 series, CES-333F slurries, etc. The global key companies of CMP Slurry for STI & ILD include Resonac, Merck KGaA, AGC, KC Tech, Soulbrain and Anjimircos Shanghai, etc. In 2024, the global four largest players hold a share approximately 84 % in terms of revenue. The Chinese market is very active, with new companies entering the industry continuously in recent years. Currently the Potential Entrants of Ceria CMP Slurry include Hubei Dinglong, Konfoong Materials International, Zhuhai Cornerstone Technologies and CHUANYAN, etc. In next six years, Chinese players will play more important roles in Ceria CMP Slurry market. In terms of product segment, Colloidal Ceria Slurry holds 77.17%, while Calcined Ceria Slurry holds 22.83% in 2024. In next six years, Colloidal Ceria Slurry will grow faster in the next few years. In terms of application, currently CMP Ceria Slurries are mainly used in STI and ILD process, with a share over 95%. According to Semiconductor Industry Association (SIA), global semiconductor chip sales hit \$627.6 billion in 2024, an increase of 19.1% compared to

the 2023 total of \$526.8 billion. The global semiconductor market experienced its highest-ever sales year in 2024, topping \$600 billion in annual sales for the first time, and double-digit market growth is projected for 2025. Semiconductors enable virtually all modern technologies ? including medical devices, communications, defense applications, AI, advanced transportation, and countless others ? and the long-term industry outlook is incredibly strong. Regionally, yearly sales were up in the Americas (44.8%), China (18.3%), and Asia Pacific/All Others (12.5%), but down in Japan (-0.4%), and Europe (-8.1%). Several semiconductor product segments stood out in 2024. Sales of logic products totaled \$212.6 billion in 2024, making it the largest product category by sales. Memory products were second in terms of sales, increasing by 78.9% in 2024 to a total of \$165.1 billion. DRAM products, a subset of memory, recorded an 82.6% sales increase, the largest percentage growth of any product category in 2024.

The global CMP Slurry for ILD and STI market size was estimated at USD 425.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.60% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global CMP Slurry for ILD and STI market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global CMP Slurry for ILD and STI market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the CMP Slurry for ILD and STI market.

## **Global CMP Slurry for ILD and STI Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Resonac  
Merck KGaA (Versum Materials)  
Fujifilm  
AGC  
KC Tech  
Fujimi Corporation  
DuPont  
Anjimirco Shanghai  
Soulbrain  
Dongjin Semichem  
Samsung SDI  
ACE NANOCHEM  
Saint-Gobain  
Ferro (UWiZ Technology)  
Shenzhen Angshite Technology

### **Market Segmentation (by Type)**

Colloidal Silica Slurries  
Ceria CMP Slurries

### **Market Segmentation (by Application)**

Logic  
NAND  
DRAM  
Others

## **Geographic Segmentation**

North America (USA, Canada, Mexico)

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

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

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

## **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the CMP Slurry for ILD and STI Market

Overview of the regional outlook of the CMP Slurry for ILD and STI Market:

## **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division

standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the CMP Slurry for ILD and STI Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of CMP Slurry for ILD and STI, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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