

Global Cerium Oxide Slurry Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cerium Oxide Slurry market size is expected to reach \$ 572 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Cerium Oxide Slurry is a functional polishing material composed primarily of cerium dioxide (CeO₂) particles dispersed in a liquid medium, typically appearing as a milky or light yellow suspension. It was developed to address the stringent requirements for surface smoothness, flatness, and material removal rate in precision polishing and semiconductor chemical mechanical planarization (CMP) processes. The slurry combines mechanical abrasion of fine particles with chemical interactions to achieve high-precision surface finishing of glass, optical lenses, ceramics, and semiconductor wafers, while minimizing scratches and localized damage. Historically, it evolved from the dispersion of cerium oxide polishing powders, and as demand grew in semiconductor fabrication, optical processing, and high-precision ceramics, the product has advanced into high-purity, uniform, and controllable particle size slurry formulations. Upstream raw materials include rare earth minerals and high-purity cerium oxide powders, midstream processing involves dispersion, particle engineering, and stabilization treatments, and downstream applications include optical glass polishing, semiconductor CMP, precision ceramics, and functional material polishing. In 2025, the global production capacity of cerium oxide polishing slurry is estimated at 120,000 tons, with sales volume reaching 99,285 tons. The average selling price is approximately US\$3,500 per ton, and manufacturers' gross profit margin is in the range of 20%-30%.

In recent years, the market for cerium oxide slurry has maintained steady growth, primarily driven by demand from the semiconductor manufacturing, precision optics, and high-end ceramics sectors. Increasing requirements for surface flatness,

smoothness, and processing efficiency have positioned cerium oxide slurry as a core material in CMP polishing, optical glass, and ceramic finishing applications. With rising attention to product uniformity, batch stability, and chemical activity, the value chain—from upstream high-purity cerium oxide powder supply to midstream particle engineering, dispersion, and stabilization processes—has seen continual improvements in technical capabilities and process control. Additionally, changes in global manufacturing footprints and relocation of downstream production bases have shifted supply and logistics toward regions with clustered manufacturing advantages, further optimizing and integrating the industry chain.

Looking forward, the development of the cerium oxide slurry market will increasingly rely on high-end manufacturing demands and technological progress, particularly in advanced semiconductor packaging, 3D integration, and high-precision ceramic processing. Control over nanoparticle size, particle distribution uniformity, surface modification, and optimized doping systems will become key competitive differentiators. Enterprises that continuously iterate technologies and innovate processes to enhance product performance are expected to capture larger market shares in downstream applications. At the same time, the promotion of green manufacturing and sustainability concepts will drive optimization in resource utilization, energy efficiency, and waste management, enhancing industry value and market competitiveness.

Despite promising market prospects, the cerium oxide slurry industry faces multiple constraints. Upstream stability of rare earth resources and the capabilities for refining and separation directly affect product capacity and purity. The production of high-end nanoparticle slurry involves complex particle engineering and stringent contamination control, demanding substantial technical expertise and controlled manufacturing environments, which creates high entry barriers for newcomers. Downstream sectors, particularly semiconductor CMP, impose stringent requirements on slurry consistency, defect rates, and long-term stability, increasing the pressure on quality control, supply chain management, and customer coordination. Moreover, uncertainties in global trade policies and industry chain layouts pose challenges to operational strategy and market expansion, collectively forming the complex drivers and restraints shaping the industry's growth and limitations.

This report studies the global Cerium Oxide Slurry production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cerium Oxide Slurry 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 Cerium Oxide Slurry that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cerium Oxide Slurry total production and demand, 2021-2032, (Tons)

Global Cerium Oxide Slurry total production value, 2021-2032, (USD Million)

Global Cerium Oxide Slurry production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Cerium Oxide Slurry consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Cerium Oxide Slurry domestic production, consumption, key domestic manufacturers and share

Global Cerium Oxide Slurry production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Cerium Oxide Slurry production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Cerium Oxide Slurry production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Cerium Oxide Slurry 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 Resonac, Merck KGaA (Versum Materials), Fujifilm, AGC, KC Tech, Fujimi Corporation, DuPont, Anjimirco Shanghai, Soulbrain, Dongjin Semichem, 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 Cerium Oxide Slurry market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, 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 Cerium Oxide Slurry Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cerium Oxide Slurry Market, Segmentation by Type:

Calcined Ceria

Colloidal Ceria

Global Cerium Oxide Slurry Market, Segmentation by Particle Size:

Micron-Sized CeO₂?

Sub-Micron CeO₂?

Nanoparticle CeO₂?

Global Cerium Oxide Slurry Market, Segmentation by Morphology:

Spherical Particles

Irregular/Flake Particles

Global Cerium Oxide Slurry Market, Segmentation by Application:

Glass Substrates

Optical Lenses

Hard Disks

Other

Companies Profiled:

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

Key Questions Answered:

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

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