

Global CMP Pads Conditioning Disk Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CMP Pads Conditioning Disk market size is expected to reach \$ 693 million by 2032, rising at a market growth of 7.6% CAGR during the forecast period (2026-2032).

A CMP Pads Conditioning Disk is a critical consumable in chemical mechanical planarization (CMP) processes, designed to dress the polishing pad surface with diamond grit or other abrasives. It removes residual slurry and debris while restoring pad roughness and porosity, ensuring consistent polishing rates and wafer surface uniformity. By extending CMP pad lifespan and maintaining process stability, it plays a vital role in semiconductor wafer fabrication, advanced packaging, and substrate material polishing. In 2025, global CMP pads conditioning disk output reached 1.87 million units, with an average selling price of USD 204 per unit.

The market growth of CMP (Chemical Mechanical Planarization) pads conditioning disks is primarily driven by the continuous advancement of semiconductor manufacturing processes and the adoption of advanced nodes (e.g., 3nm/5nm), which demand stricter wafer surface uniformity. Rising demand for logic chips, memory (e.g., 3D NAND), and advanced packaging (e.g., TSV) has made conditioning disks a critical consumable for maintaining CMP pad performance essential for high precision, durability, and stability. Additionally, global semiconductor capacity expansion (e.g., new wafer fabs) and the emergence of wide-bandgap materials (e.g., SiC/GaN) further propel the market.

Key trends include: 1) Ultra-hard materials (e.g., diamond coatings) to extend disk lifespan; 2) Smart conditioning technologies (sensor-integrated real-time wear monitoring); 3) Eco-friendly designs to reduce polishing waste; 4) Customized solutions

for diverse CMP processes (e.g., copper/dielectric polishing). Meanwhile, the localization of supply chains in China will reshape competitive dynamics.

This report studies the global CMP Pads Conditioning Disk production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CMP Pads Conditioning Disk 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 CMP Pads Conditioning Disk that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CMP Pads Conditioning Disk total production and demand, 2021-2032, (K Units)

Global CMP Pads Conditioning Disk total production value, 2021-2032, (USD Million)

Global CMP Pads Conditioning Disk production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global CMP Pads Conditioning Disk consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: CMP Pads Conditioning Disk domestic production, consumption, key domestic manufacturers and share

Global CMP Pads Conditioning Disk production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global CMP Pads Conditioning Disk production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global CMP Pads Conditioning Disk production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global CMP Pads Conditioning Disk 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 3M, Kinik Company, Saesol Diamond, Entegris, EHWA DIAMOND, Nippon Alloy, Shinhan Diamond, Abrasive Technology, BEST Engineering Surface Technologies, Xiamen Jiapin Diamond Industry, 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 CMP Pads Conditioning Disk market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) 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 CMP Pads Conditioning Disk Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CMP Pads Conditioning Disk Market, Segmentation by Type:

Conventional Pad Conditioners

CVD Diamond Pad Conditioners

Global CMP Pads Conditioning Disk Market, Segmentation by End Users:

Foundry

IDM

Global CMP Pads Conditioning Disk Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global CMP Pads Conditioning Disk Market, Segmentation by Application:

300mm Wafer

200mm Wafer

Others

Companies Profiled:

3M

Kinik Company

Saesol Diamond

Entegris

EHWA DIAMOND

Nippon Alloy

Shinhan Diamond

Abrasive Technology

BEST Engineering Surface Technologies

Xiamen Jiapin Diamond Industry

Key Questions Answered:

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

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