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

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Abstracts

The global CMP Pads market size is expected to reach $ 1975 million by 2032, rising at a market growth of 6.5% CAGR during the forecast period (2026-2032).

Chemical mechanical polishing/planarization (CMP) is a process that removes materials by a combination of chemical and mechanical (or abrasive) actions to achieve highly smooth and planar material surfaces. Chemical-mechanical polishing (CMP) is often associated with chemical-mechanical planarization which is a polishing process assisted by chemical reactions to remove surface materials. CMP is a standard manufacturing process practiced at the semiconductor industry to fabricate integrated circuits and memory disks. When the purpose is to remove surface materials, it is referred to as chemical-mechanical polishing. However, when the purpose is to flatten a surface, it is referred to as chemical-mechanical planarization. CMP is considered to be a tribochemical process because of the synergy between friction and corrosion. CMP Pad (Chemical Mechanical Polishing Pad) is a product which increases semiconductor integration by smoothening the semiconductor wafer surface through physical and chemical polishing processes. In 2025, global CMP polishing pad production reached 2.7 million pieces, with an average selling price of US$453 per piece.

The silicon carbide (SiC) chemical mechanical planarization (CMP) pads market is evolving rapidly, driven by the booming demand for SiC power devices in electric vehicles (EVs), renewable energy, and 5G infrastructure. The global SiC CMP Pads market was valued at US$ 47.97 million in 2024 and is expected to reach US$ 204.18 million by 2031, growing at a CAGR of 17.15% during 2025-2031. The silicon carbide (SiC) chemical mechanical planarization (CMP) pad market is a critical enabler for next-generation power electronics, with distinct competitive dynamics and technological challenges.

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At present, considering the cost and the influence of the size of silicon wafers on the performance and efficiency of integrated circuits, the increase in the size of wafers is an inevitable trend and a mainstream trend, in particular, 8-inch and 12-inch. Wafer may develop in the direction of 18 inches in the future. However, the larger the size, the more difficult it is to produce the corresponding CMP pad. When the downstream size becomes an inevitable trend, in order to occupy the market, it is necessary to be able to develop large-size pad, otherwise it will be eliminated by the market. With the expectation of the superior performance improvement of integrated circuits, the polishing performance of CMP pads has to be increased, so its performance in the future must be more stringent.

Several of the current market-oriented enterprises in China have not obtained foreign certifications, so there is no export for the time being. Because downstream companies are mainly concentrated in Japan, Taiwan, South Korea, Europe and the United States and other countries, in addition to Europe and South Korea, these countries have a relatively large market position of CMP polishing pads in several other regions. The electronics industry is mainly concentrated in the Asia-Pacific region, but the current political situation is not optimistic, especially in 2020, it may be the most serious year for China's political crisis in the past 30 years. Due to the current trade frictions and China's current international political factors, it may be the best time for domestic CMP pad manufacturers to occupy the market, and the country's policy investment will increase in the coming years. Therefore, Chinese companies will usher in opportunities for localization in the next few years. We predict that in order to occupy the market, Hubei Dinglong may actively lower the price of the product and madly occupy the market.

New investment requires large capital, and it is difficult for small-scale enterprises to enter the industry. CMP Pads has higher requirements on technology level and processing technology. At present, the market is occupied by American companies. The market is not only influenced by the price, but also influenced by the product performance. The leading companies own the advantages on better performance, more abundant product?s types, better technical and impeccable after-sales service. Consequently, they take the majority of the market share of high-end market. Looking to the future years, prices gap between different brands will go narrowing. Similarly, there will be fluctuation in gross margin.

For manufacturers that have already entered, they need to constantly raise the technical threshold to prevent more companies from entering; by reducing costs and reducing prices, they will quickly occupy the market, develop incremental customer markets, and

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establish market share advantages; create a brand image and lay an advantage for entering the consumer goods market. Only in this way can we have a larger market share of capital in the fierce competition.

Despite this interest, the CMP pad market poses several significant barriers to entry. First, the industry is highly specialized and requires deep technical expertise in materials science, surface chemistry, and wafer process integration. Second, stringent performance requirements ? such as planarity, defectivity, and compatibility with specific slurries ? mean that pad suppliers must go through extensive qualification processes with semiconductor fabs, which can take years. Additionally, the market is dominated by a few entrenched players with long-term relationships and proprietary technologies, making it difficult for newcomers to gain design-ins. High R&D costs, capital investment in precision manufacturing, and the need for global support infrastructure also pose substantial challenges.

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

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

Highlights and key features of the study
Global CMP Pads total production and demand, 2021-2032, (K Pcs)
Global CMP Pads total production value, 2021-2032, (USD Million)
Global CMP Pads production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)
Global CMP Pads consumption by region & country, CAGR, 2021-2032 & (K Pcs)
U.S. VS China: CMP Pads domestic production, consumption, key domestic manufacturers and share
Global CMP Pads production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)
Global CMP Pads production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)
Global CMP Pads production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

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This report profiles key players in the global CMP Pads 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 Qnity, Entegris, Hubei Dinglong, Fujibo, IVT Technologies, SK enpulse, KPX Chemical, TWI Incorporated, 3M, FNS TECH, 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 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Pcs) and average price (US$/Pc) 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 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Global CMP Pads Market, Segmentation by Type:

Polymer CMP Pad

Non-woven CMP Pad

Composite CMP Pad

Global CMP Pads Market, Segmentation by Hardness:

Hard Pad

Soft Pad

Global CMP Pads Market, Segmentation by Wafer Material:

SiC Wafer

Si Wafer

Others

Global CMP Pads Market, Segmentation by Application:

300 mm Wafer

200 mm Wafer

Others

Companies Profiled:

Qnity

Entegris

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Hubei Dinglong

Fujibo

IVT Technologies

SK enpulse

KPX Chemical

TWI Incorporated

3M

FNS TECH

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

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