

Global CMP Slurry for STI & ILD Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

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Abstracts

According to our (Global Info Research) latest study, the global CMP Slurry for STI & ILD market size was valued at US\$ 437 million in 2024 and is forecast to a readjusted size of USD 705 million by 2031 with a CAGR of 7.4% during review period.

In this report, we will assess the current U.S. tariff framework alongside international policy adaptations, analyzing their effects on competitive market structures, regional economic dynamics, and supply chain resilience.

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 , typical 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 Anjimirco 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.

This report is a detailed and comprehensive analysis for global CMP Slurry for STI & ILD market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global CMP Slurry for STI & ILD market size and forecasts, in consumption value (\$

Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2020-2031

Global CMP Slurry for STI & ILD market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2020-2031

Global CMP Slurry for STI & ILD market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2020-2031

Global CMP Slurry for STI & ILD market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Kg), 2020-2025

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for CMP Slurry for STI & ILD
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global CMP Slurry for STI & ILD market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

CMP Slurry for STI & ILD market is split by Type and by Application. For the period 2020-2031, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Colloical Silica Slurry

CeO₂ (Ceria) Slurry

Market segment by Application

Slurry for STI Applications

Slurry for ILD Applications

Major players covered

Resonac

Merck KGaA (Versum Materials)

Fujifilm

AGC

KC Tech

Fujimi Corporation

DuPont

Anjimirco Shanghai

Soulbrain

Dongjin Semichem

Samsung SDI

ACE NANO CHEM

Saint-Gobain

Ferro (UWiZ Technology)

Shenzhen Angshite Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe CMP Slurry for STI & ILD product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of CMP Slurry for STI & ILD, with price, sales quantity, revenue, and global market share of CMP Slurry for STI & ILD from 2020 to 2025.

Chapter 3, the CMP Slurry for STI & ILD competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the CMP Slurry for STI & ILD breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2020 to 2031.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2020 to 2031.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2020 to 2025. and CMP Slurry for STI & ILD market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of CMP Slurry for STI & ILD.

Chapter 14 and 15, to describe CMP Slurry for STI & ILD sales channel, distributors, customers, research findings and conclusion.

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