

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

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Abstracts

The global CMP Slurry and Pads market size is expected to reach \$ 5317 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

CMP slurries and CMP pads are the core consumable set enabling wafer planarization in IC manufacturing. In CMP, controlled backside pressure brings the wafer front surface into contact with a rotating pad while a chemical-and-abrasive slurry at the interface drives simultaneous chemical reaction and mechanical abrasion to remove overburden and achieve global/local planarity. In practice, these are not generic materials: slurry chemistries are engineered by film stack (dielectric/oxide including STI and ILD, tungsten, copper, barrier layers, and emerging metals), while pad platforms are tuned via hardness, pore structure, compressibility, and groove patterns to hit the target removal rate, selectivity, within-wafer non-uniformity, and defectivity for each CMP module. Leading suppliers increasingly position CMP as a system: slurry + pad + post-CMP cleaning chemistries/brushes + filtration/monitoring to reduce particles/residues and stabilize yield.

Upstream inputs cluster into (i) ultra-high-purity abrasives and dispersion systems (e.g., silica families and ceria abrasives for selective oxide/ILD applications), (ii) specialty formulation chemicals (oxidizers, complexing agents, corrosion inhibitors, surfactants, pH control, trace-metal management), and (iii) pad material supply (dominantly microporous polyurethane constructions with engineered grooves). Midstream CMP-consumables manufacturing is governed by customer specification and qualification: product or manufacturing changes can trigger customer re-qualification, adding switching friction and elevating the importance of local field/application support. Competitive structure is concentrated and platform-led. In CMP Slurry, the global key players are Entegris (CMC Materials), Resonac, Fujimi Incorporated, Qnity Electronics,

Merck KGaA (Versum Materials), Fujifilm, AGC, KC Tech, JSR Corporation and Anjimirco Shanghai, etc. While in CMP pad, the key players are Qnity Electronics, Fujibo Group, Entegris (CMC Materials), and Hubei Dinglong, etc.

Market dynamics are being shaped by three technical megatrends: (1) more CMP steps and tighter defect budgets in advanced logic and advanced memory; (2) higher selectivity and stop-on-film requirements across oxide/STI, Cu/barrier, W, and emerging materials; and (3) stronger coupling of consumables with post-CMP cleaning/filtration/monitoring to control particles, trace metals, and organic residues. On the supply side, differentiation is shifting from ?headline removal rate? toward ?wide process window + low defectivity + stable CoO,? supported by integrated consumables portfolios and closer co-optimization with customers? roadmaps, alongside a visible push toward localized, cost-competitive, and more resilient supply chains. Key demand drivers remain structurally tied to rising interconnect complexity (CMP adoption historically tracked the rapid increase in metal layers and challenging topography) and the unit-driven nature of consumables demand during upcycles?Entegris, for example, has explicitly pointed to CMP consumables as a contributor to growth in its results communications.

This report studies the global CMP Slurry and Pads demand, key companies, and key regions.

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

Highlights and key features of the study

Global CMP Slurry and Pads total market, 2021-2032, (USD Million)

Global CMP Slurry and Pads total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: CMP Slurry and Pads total market, key domestic companies, and share, (USD Million)

Global CMP Slurry and Pads revenue by player, revenue and market share 2021-2026, (USD Million)

Global CMP Slurry and Pads total market by Type, CAGR, 2021-2032, (USD Million)

Global CMP Slurry and Pads total market by Wafer Size, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global CMP Slurry and Pads market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Entegris (CMC Materials), Resonac, Fujimi Incorporated, Qnity Electronics, Merck KGaA (Versum Materials), Fujifilm, AGC, KC Tech, JSR Corporation, Anjimirco Shanghai, 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 Slurry and Pads market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Wafer Size. 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 Slurry and Pads Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CMP Slurry and Pads Market, Segmentation by Type:

CMP Slurry

CMP Pads

Global CMP Slurry and Pads Market, Segmentation by Semiconductor Type:

Silicon Semiconductor

SiCk & GaN Semiconductor

Others

Global CMP Slurry and Pads Market, Segmentation by Process:

IC Manufacturing

Wafer/Substrate Manufacturing

Others

Global CMP Slurry and Pads Market, Segmentation by Wafer Size:

300mm Wafer

200mm Wafer

Others

Companies Profiled:

Entegris (CMC Materials)

Resonac

Fujimi Incorporated

Qnity Electronics

Merck KGaA (Versum Materials)

Fujifilm

AGC

KC Tech

JSR Corporation

Anjimirco Shanghai

Soulbrain

Saint-Gobain

Ace Nanochem

Dongjin Semichem

Vibrantz (Ferro)

WEC Group

SKC (SK Enpulse)

Shanghai Xinanna Electronic Technology

Hubei Dinglong

Samsung SDI

Fujiibo Group

3M

FNS TECH

IVT Technologies Co, Ltd.

TWI Incorporated

KPX Chemical

Engis Corporation

TOPPAN INFOMEDIA

CHUANYAN

Zhuhai Cornerstone Technologies

Konfoong Materials International

Tianjin Helen

Shenzhen Angshite Technology

Advanced Nano Products Co.,Ltd

Zhejiang Bolai Narun Electronic Materials

Dongguan Golden Sun Abrasives

Shinmicro Materials (Jiaxing)

Beijing Hangtian Saide

Key Questions Answered

1. How big is the global CMP Slurry and Pads market?
2. What is the demand of the global CMP Slurry and Pads market?
3. What is the year over year growth of the global CMP Slurry and Pads market?

4. What is the total value of the global CMP Slurry and Pads market?
5. Who are the Major Players in the global CMP Slurry and Pads market?
6. What are the growth factors driving the market demand?

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