

# Global Conditioning Brush Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Conditioning Brush market size was valued at US\$ 99 million in 2025 and is forecast to a readjusted size of US\$ 169 million by 2032 with a CAGR of 8.0% during review period.

A Conditioning Brush is a brush-based tool or consumable used in the Chemical Mechanical Planarization (CMP) process to clean and maintain the condition of polishing pads or wafer surfaces. It operates through mechanical contact between the brush fibers and the surface, often in combination with cleaning fluids or slurry flow, to remove residual particles, reopen pad pores, and prevent surface glazing. By doing so, it helps maintain the desired surface roughness and ensures stable polishing performance. Conditioning brushes are typically used alongside diamond conditioners and serve as auxiliary maintenance tools in CMP systems. In 2025, global CMP conditioning brush production reached approximately 798,750 units, with an average global market price of around US\$ 120 per unit. Annual production capacity is 900,000 units. Gross Profit Margin: 28%. CMP conditioning brushes occupy a critical position in the semiconductor manufacturing process, bridging the upstream chemical and material suppliers with the downstream wafer fabrication. Upstream, the industry relies on high-quality PVA, nylon, or composite polymers as brush materials, and precise molding and assembly equipment for manufacturing. Midstream includes the brush manufacturers who design, produce, and calibrate brushes to meet specific CMP line requirements. Downstream, the brushes are integrated into CMP machines in wafer fabs, where their performance directly affects polishing uniformity, wafer surface quality, and defect rates. The value chain is tightly linked, and material quality and manufacturing precision are decisive factors for overall performance. CMP conditioning brushes are a deceptively simple yet highly specialized product. While the unit price seems modest, their impact

on semiconductor yield and surface quality is significant. Investing in high-quality brushes can reduce defects and improve throughput, making them an essential consumable in advanced fabs. Given the growing demand for smaller nodes and high-density wafers, I expect the market for these brushes to continue expanding steadily, and Chinese manufacturers have opportunities to increase their presence in the mid-to-low end while gradually moving into higher-end, high-purity applications.

This report is a detailed and comprehensive analysis for global Conditioning Brush market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Structural Design 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 Conditioning Brush market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Conditioning Brush market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Conditioning Brush market size and forecasts, by Structural Design and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Conditioning Brush market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

### **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 Conditioning Brush

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 Conditioning Brush 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 ITW Rippey Corporation, Entegris, Inc., Aion Co., Ltd., 3M Company, BrushTek Co., Ltd., Nippon Pelnox Corporation, Nippon Filcon Co., Ltd., FerroTec Holdings Corporation, Technic Inc., Showa Industries, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### **Market Segmentation**

Conditioning Brush market is split by Structural Design and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Structural Design, 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 Structural Design

Disk Brush

Roller Brush

Ring Brush

Strip Brush

#### Market segment by Brush Material

Nylon Brush

Polyvinyl Alcohol Brush

Polypropylene, PP Brush

Composite Material Brush

Market segment by Process Stage

In-situ CMP Brush

Post-CMP Cleaning Brush

Market segment by Application

Semiconductor

Optical

Others

Major players covered

ITW Rippey Corporation

Entegris, Inc.

Aion Co., Ltd.

3M Company

BrushTek Co., Ltd.

Nippon Pelnox Corporation

Nippon Filcon Co., Ltd.

FerroTec Holdings Corporation

Technic Inc.

Showa Industries

G&S Industrial

Daewon Brush

O2 Technology

AKT Components Sdn Bhd

Kleen-Rite

Shanghai Sinyang Semiconductor Materials

Suzhou Jujie Electron

Kunshan Yijia Electronics

Jiangsu Cleanet

Anhui Union Brush Industry

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 Conditioning Brush product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Conditioning Brush, with price, sales quantity, revenue, and global market share of Conditioning Brush from 2021 to 2026.

Chapter 3, the Conditioning Brush competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Conditioning Brush breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Structural Design and by Application, with sales market share and growth rate by Structural Design, by Application, from 2021 to 2032.

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 2021 to 2026. and Conditioning Brush market forecast, by regions, by Structural Design, and by Application, with sales and revenue, from 2027 to 2032.

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 Conditioning Brush.

Chapter 14 and 15, to describe Conditioning Brush sales channel, distributors, customers, research findings and conclusion.

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