

Global Nanopolishing Slurry Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GB9AFB8AB97CEN.html>

Date: July 2026

Pages: 166

Price: US\$ 4,480.00 (Single User License)

ID: GB9AFB8AB97CEN

Abstracts

The global Nanopolishing Slurry market size is expected to reach \$ 4677 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

Nanopolishing slurry refers to a precision polishing material formulated with nanoscale abrasive particles as its core component, supplemented by various additives such as dispersants, pH regulators, surfactants, oxidizers, and corrosion inhibitors. It is primarily utilized for the ultra-precision grinding and planarization of surfaces on materials such as metals, glass, ceramics, sapphire, silicon wafers, silicon carbide, optical components, and semiconductor wafers. Its defining characteristic lies in the fact that the abrasive particles typically fall within the nanoscale range and exhibit a uniform distribution; this enables the material to simultaneously minimize surface scratches and defects while enhancing surface finish, flatness, and material removal efficiency. Consequently, it finds widespread application across fields such as optical processing, electronic materials, semiconductor Chemical Mechanical Planarization (CMP), precision ceramics, and high-end manufacturing.

The upstream segment of the nanopolishing slurry industry chain primarily comprises nanoscale abrasive particles and fine chemical additives. The abrasive materials include nanoscale silica, alumina, ceria, zirconia, diamond, and silicon carbide, among others; the additives encompass dispersants, surfactants, pH regulators, oxidizers, corrosion inhibitors, complexing agents, biocides, ultra-pure water, filter cartridges, and high-cleanliness packaging materials. The midstream segment involves the development of nanopolishing slurry formulations, particle dispersion, purification and filtration, clean-room filling, quality inspection, and customer validation. The downstream segment focuses on precision processing applications such as semiconductor CMP, silicon and silicon carbide wafers, sapphire substrates, optical lenses, hard disk

substrates, precision ceramics, metal components, and display panels. The gross profit margin for nanopolishing slurry stands at approximately 31%.

In 2025, the average price of nanopolishing slurry is projected to be \$21,000 per ton, with a sales volume of 133.5 k tons and a total production capacity of 190 k tons.

The core value of nano-polishing slurries lies in enabling high-precision, low-damage, and highly consistent surface processing. As high-end manufacturing places increasingly stringent demands on material surface flatness, roughness, and defect control, polishing slurries have evolved from mere auxiliary consumables into critical materials that directly impact processing yields, product performance, and process stability. Compared to traditional polishing materials, nano-polishing slurries leverage finer particles, more stable dispersion systems, and more controllable chemical interactions to simultaneously enhance surface quality while mitigating issues such as scratching, residue accumulation, and processing non-uniformity.

The competitive landscape within the nano-polishing slurry industry is shifting its focus from the mere supply of abrasive particles toward expertise in formulation systems, process adaptability, and customer qualification capabilities. Given the significant variations in slurry requirements across different materials, processing techniques, and end products, enterprises must engage in continuous, long-term optimization regarding particle size, dispersion stability, chemical reaction systems, impurity control, and batch-to-batch consistency. While generic products are prone to falling into the trap of price competition, high-end products rely more heavily on accumulated technical expertise, process experience, and strong customer relationships; consequently, companies possessing robust capabilities in customized development and stable mass production are better positioned to capture higher added value.

Looking ahead, nano-polishing slurries will continue to evolve toward higher purity, lower defect rates, greater compositional complexity, and increased specialization. The rising demands for precision processing within downstream industries will drive the transition of polishing slurries from generic, general-purpose products toward specialized formulations tailored to specific materials and processes. Concurrently, the development of domestic supply chains along with the localization of high-end materials will compel nano-polishing slurry manufacturers to enhance their R&D, quality control, and customer service capabilities; as a result, industry competition will increasingly prioritize deep material understanding, process synergy, and the capacity for long-term, stable supply.

This report studies the global Nanopolishing Slurry production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Nanopolishing Slurry total production and demand, 2021-2032, (Tons)

Global Nanopolishing Slurry total production value, 2021-2032, (USD Million)

Global Nanopolishing Slurry production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Nanopolishing Slurry consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Nanopolishing Slurry domestic production, consumption, key domestic manufacturers and share

Global Nanopolishing Slurry production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Nanopolishing Slurry production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Nanopolishing Slurry production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Nanopolishing Slurry 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 Entegris, Qnity Electronics, Engis, Polysciences, Merck, Saint-Gobain, Pureon, Baikowski, Kemet International, Logitech, 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 Nanopolishing Slurry market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 Nanopolishing Slurry Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nanopolishing Slurry Market, Segmentation by Type:

Low Solids Content Type

Medium Solids Content Type

High Solids Content Type

Global Nanopolishing Slurry Market, Segmentation by pH:

Acidic Nanopolishing Slurry (pH

Neutral Nanopolishing Slurry (6 ? pH ? 8)

Alkaline Nanopolishing Slurry (pH > 8)

Global Nanopolishing Slurry Market, Segmentation by Viscosity:

Low-Viscosity Polishing Fluid

Medium-Viscosity Polishing Fluid

High-Viscosity Polishing Fluid

Global Nanopolishing Slurry Market, Segmentation by Application:

Semiconductor Industry

Optical Components Industry

Display Panel Industry

Automotive Components

Aerospace

Medical Devices

Others

Companies Profiled:

Entegris

Qnity Electronics

Engis

Polysciences

Merck

Saint-Gobain

Pureon

Baikowski

Kemet International

Logitech

Fujimi

AGC

JSR

Fujifilm

Nitta DuPont

Resonac

Anji Microelectronics Technology

Hubei Dinglong Holdings

Shanghai Xinanna Electronic Technology

ANST Technology(Shenzhen)

Beijing Grish Hitech

Wuxi Jizhi Electronic Technology

Key Questions Answered:

1. How big is the global Nanopolishing Slurry market?

Global Nanopolishing Slurry Supply, Demand and Key Producers, 2026-2032

2. What is the demand of the global Nanopolishing Slurry market?
3. What is the year over year growth of the global Nanopolishing Slurry market?
4. What is the production and production value of the global Nanopolishing Slurry market?
5. Who are the key producers in the global Nanopolishing Slurry market?
6. What are the growth factors driving the market demand?

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