

# Global Post CMP Residue Removal Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Post CMP Residue Removal market size is expected to reach \$ 369 million by 2032, rising at a market growth of 6.5% CAGR during the forecast period (2026-2032).

Post-CMP residue removers are specialty wet-process chemicals used after Chemical Mechanical Planarization (CMP) to remove slurry particles, metal/metal-oxide debris, polishing by-products, organic additives, and surface contaminants from wafer surfaces through controlled dissolution, complexation/chelation, dispersion, and lift-off, typically in combination with brush cleaning, ultrasonic/megasonic agitation, and DI-water rinsing. Formulations commonly integrate acidic or alkaline chemistries, oxidizing/reducing agents, chelators, surfactants, and corrosion inhibitors, and are designed to deliver high residue removal efficiency while minimizing corrosion/etch of metals (e.g., Cu, W, Co), dielectrics (SiO<sub>2</sub> and low-k), barrier layers (Ta/TaN), and the substrate, ensuring low defectivity, low re-deposition, and robust downstream film adhesion and device reliability. In 2025, global production of post-CMP residue removal chemicals reached 20,265 tons, with an average selling price of USD 11.22 per kg.

Post-CMP residue removal chemicals are a critical segment within wafer fab wet-clean process chemistries. They are used after Chemical Mechanical Planarization to remove slurry particles, metal/metal-oxide debris, polishing by-products, and organic additives through controlled dissolution, complexation/chelation, dispersion, and lift-off, typically co-optimized with brush cleaning, megasonic agitation, and DI-water rinsing. As interconnect stacks evolve and more fragile low-k dielectrics and ultra-thin barrier layers are adopted, formulators must balance removal efficiency, material selectivity, and corrosion suppression within a narrower process window. This drives the market shift from general-purpose cleaners to material-stack- and node-specific formulations,

supporting steady expansion and product mix upgrading.

In terms of scale and growth, demand is closely tied to wafer output, CMP step counts, and post-CMP clean configurations. Incremental growth is primarily driven by increasing CMP and cleaning intensity in advanced logic and high-layer memory, alongside tighter defectivity targets. Regionally, demand clusters around East Asian wafer manufacturing hubs, while North America and Europe remain important for advanced process/material development; supply is shared between multinational specialty chemical leaders and high-purity regional suppliers, with the highest-end products shaped by long qualification cycles and deep customer engagement.

From a product structure perspective, residue removers are commonly categorized by chemistry and mechanism, including acidic/alkaline systems, oxidizing/reducing systems, chelation-driven systems, and blended formulations. Corrosion inhibitors and surfactants are typically integrated to minimize attack on metals (Cu/W/Co), protect low-k dielectrics, and reduce particle re-deposition. By application, products cover post-Cu CMP cleans, W plug/contact CMP residue removal, and slurry- or pad-specific residue regimes. End-use is dominated by front-end wafer fabs (logic/foundry and memory), with limited spillover into planarization-related cleaning steps in advanced packaging, but front-end CMP post-clean remains the core driver.

Cost structure is driven by high-purity solvents/water, functional additives (chelators, inhibitors, surfactants, redox components), ultra-fine filtration, and clean filling/packaging. Manufacturing competitiveness depends on ultra-low metal-ion and particle control, as well as batch-to-batch consistency. Customer qualification, field application engineering, and quality-system maintenance add substantial non-material costs and form practical barriers to entry. On capacity metrics, single-line capacity is typically 1,000 tons per year or higher; scalable lines leverage closed mixing, in-line filtration, and clean filling to improve yield and consistency. In practice, effective supply is often constrained by changeover efficiency and application engineering bandwidth during periods of rapid product iteration and intensive customer ramps.

Along the value chain, upstream includes high-purity base chemicals, functional additives, filtration consumables, and packaging; midstream centers on formulation R&D, ultra-pure manufacturing, QC, and application engineering; downstream consists of wafer fabs and their process/equipment integration partners. Competition is led by multinational specialty chemical incumbents with strong global delivery and qualification depth, while regional high-purity suppliers compete through responsiveness, cost structure, and localized supply-chain resilience. The competitive focus is shifting from

single-point cleaning power to an integrated performance bundle of low defectivity, low corrosion, low re-deposition, and process co-optimization. Profitability is supported by technical barriers and customer stickiness, with gross margin typically around 40%, and upside for leaders through high-end customization and service-augmented delivery.

Key trends include higher selectivity and wider process windows for emerging interconnect materials, improved protection for low-k and ultra-thin films, and more robust removal of organic residues and nano-particles. Co-optimization with cleaning equipment parameters (brush/megasonic/rinse) is increasingly important to reduce systemic defects. Suppliers are strengthening ultra-pure manufacturing, in-line monitoring, and digital traceability, while expanding localized capacity and multi-site redundancy to enhance delivery security. As advanced nodes and advanced packaging progress in parallel, post-CMP residue removal chemicals are expected to maintain steady growth, with value creation concentrated in high-end formulation customization and collaborative process development.

This report studies the global Post CMP Residue Removal production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Post CMP Residue Removal total production and demand, 2021-2032, (Tons)  
Global Post CMP Residue Removal total production value, 2021-2032, (USD Million)  
Global Post CMP Residue Removal production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)  
Global Post CMP Residue Removal consumption by region & country, CAGR, 2021-2032 & (Tons)  
U.S. VS China: Post CMP Residue Removal domestic production, consumption, key domestic manufacturers and share  
Global Post CMP Residue Removal production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)  
Global Post CMP Residue Removal production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)  
Global Post CMP Residue Removal production by Application, production, value,

CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Post CMP Residue Removal 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, Versum Materials (Merck KGaA), Mitsubishi Chemical, Fujifilm, DuPont, Kanto Chemical, BASF, Solexir, 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 Post CMP Residue Removal 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 Post CMP Residue Removal Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Post CMP Residue Removal Market, Segmentation by Type:

Acidic Material

Alkaline Material

Global Post CMP Residue Removal Market, Segmentation by End Users:

Foundry

IDM

Global Post CMP Residue Removal Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Post CMP Residue Removal Market, Segmentation by Application:

Metal Impurities

Organic Residue

Companies Profiled:

Entegris

Versum Materials (Merck KGaA)

Mitsubishi Chemical

Fujifilm

DuPont

Kanto Chemical

BASF

Solexir

Anjimirco Shanghai

**Key Questions Answered:**

1. How big is the global Post CMP Residue Removal market?
2. What is the demand of the global Post CMP Residue Removal market?
3. What is the year over year growth of the global Post CMP Residue Removal market?
4. What is the production and production value of the global Post CMP Residue Removal market?
5. Who are the key producers in the global Post CMP Residue Removal market?
6. What are the growth factors driving the market demand?

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