

Global Post-CMP Wafer Cleaning Equipment 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 Post-CMP Wafer Cleaning Equipment market size was valued at US\$ 278 million in 2025 and is forecast to a readjusted size of US\$ 451 million by 2032 with a CAGR of 7.1% during review period.

Post-CMP wafer cleaning equipment refers to specialized wet-process cleaning systems used to clean semiconductor wafers, silicon substrates, compound semiconductor substrates and advanced packaging substrates immediately after chemical mechanical polishing. These systems typically combine PVA brush scrubbing, double-sided brush cleaning, megasonic cleaning, chemical spray cleaning, DI-water rinsing, spin rinse drying, IPA or Marangoni drying and, in selected advanced applications, supercritical drying to remove slurry particles, polishing residues, organic contamination, metallic contaminants and watermarks from wafer surfaces. This study focuses on dedicated stand-alone, inline or separable integrated post-CMP cleaning systems used in advanced logic, memory, silicon wafer manufacturing, SiC substrate processing, advanced packaging, MEMS and R&D process development environments.

Based on our research, post-CMP wafer cleaning equipment should be viewed as a defect-control tool rather than a generic wet cleaning tool. The CMP process can leave slurry particles, metallic residues, organic contamination and surface defects on the wafer, and the post-CMP cleaning step must remove these contaminants while minimizing pattern damage, watermarks, particle re-deposition and throughput loss. Although the core technologies such as PVA brush scrubbing, megasonic cleaning, chemical spray and spin drying are mature, the performance requirements continue to rise with advanced logic, memory, silicon wafer manufacturing, SiC substrates and

advanced packaging. Therefore, the market remains a growing niche within semiconductor wet processing equipment, even though it is much narrower than the overall wafer cleaning equipment market.

From a supply-side perspective, the global industry is led by Japanese wet-cleaning and semiconductor equipment platforms, supported by U.S. specialist and legacy post-CMP cleaning players, Korean niche suppliers and a rapidly expanding Chinese local supplier base. Japanese companies have strong positions in high-volume single-wafer cleaning and spin scrubber platforms. U.S. suppliers are present through integrated CMP cleaning modules, legacy OnTrak-related installed base and R&D-oriented post-CMP tools. Chinese companies are increasingly visible in dedicated CMP post-cleaning machines, SiC CMP cleaning and broader single-wafer wet cleaning systems, although their production scale, customer validation and financial transparency vary widely. Korean suppliers remain relevant in specialized scrubber and wet cleaning tools, but several names still require further verification before being treated as core post-CMP equipment OEMs.

This estimate is based on a narrow revenue scope that includes dedicated post-CMP wafer cleaning systems and separable integrated cleaning modules, while excluding CMP polishers, cleaning chemicals, consumables and generic wet benches without clear post-CMP evidence. Growth is expected to come from more CMP steps in advanced logic and memory, tighter defect-control requirements in silicon wafer manufacturing, SiC substrate capacity expansion and advanced packaging processes such as TSV, RDL and hybrid bonding. The key competitive factors are no longer limited to tool throughput, but increasingly include low-damage cleaning, megasonic uniformity, drying performance, chemical consumption, automation compatibility and process integration with CMP platforms.

Looking ahead, the competitive landscape is likely to evolve through regional substitution rather than abrupt technology disruption. Japanese and established international suppliers will continue to benefit from installed base, process data and long-term customer qualification, while Chinese suppliers are likely to gain share in domestic mature-node fabs, SiC substrate lines, R&D lines and selected production applications. New entrants will face high qualification barriers because post-CMP cleaning directly affects yield and downstream defectivity. The most important product trends will be more integrated wet-in/dry-out architectures, improved brush and megasonic control, lower chemical and water consumption, better drying for fragile patterns, and application-specific solutions for SiC and advanced packaging.

This report is a detailed and comprehensive analysis for global Post-CMP Wafer Cleaning Equipment 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 Post-CMP Wafer Cleaning Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Post-CMP Wafer Cleaning Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Post-CMP Wafer Cleaning Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Post-CMP Wafer Cleaning Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (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 Post-CMP Wafer Cleaning Equipment

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 Post-CMP Wafer Cleaning Equipment 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 Applied Materials, Inc., Tokyo Electron Limited, SCREEN Holdings Co., Ltd., EBARA Corporation, Shibaura Mechatronics Corporation, ACM Research, Inc., Hwatsing Technology Co., Ltd., Amtech Systems, Inc., G&P Technology, Inc., KCTech Co., Ltd., etc.

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

Market Segmentation

Post-CMP Wafer Cleaning Equipment market is split by Type and by Application. For the period 2021-2032, 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

Stand-alone Post-CMP Cleaner

Inline Post-CMP Cleaning System

Other

Market segment by Wafer Size

300mm Wafer Cleaning Equipment

200mm Wafer Cleaning Equipment

150mm Wafer Cleaning Equipment

Other

Market segment by Automation Level

Fully Automatic Equipment

Semi-automatic Equipment

Manual / Laboratory Equipment

Other

Market segment by Equipment Throughput

High-throughput Production Tool

Medium-throughput Production Tool

Low-throughput R&D Tool

Other

Market segment by Application

FEOL CMP Cleaning

BEOL CMP Cleaning

Other

Major players covered

Applied Materials, Inc.

Tokyo Electron Limited

SCREEN Holdings Co., Ltd.

EBARA Corporation

Shibaura Mechatronics Corporation

ACM Research, Inc.

Hwatsing Technology Co., Ltd.

Amtech Systems, Inc.

G&P Technology, Inc.

KCTech Co., Ltd.

Beijing TSD Semiconductor Equipment Co., Ltd.

Jiangsu Xinmeng Semiconductor Equipment Co., Ltd.

Nano-Master, Inc.

Suzhou Lapple Electromechanical Technology Co., Ltd.

Araca, Inc.

C&D Semiconductor, Inc.

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 Post-CMP Wafer Cleaning Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Post-CMP Wafer Cleaning Equipment, with price, sales quantity, revenue, and global market share of Post-CMP Wafer Cleaning Equipment from 2021 to 2026.

Chapter 3, the Post-CMP Wafer Cleaning Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Post-CMP Wafer Cleaning Equipment 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 Type and by Application, with sales market share and growth rate by Type, 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 Post-CMP Wafer Cleaning Equipment market forecast, by regions, by Type, 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 Post-CMP Wafer Cleaning Equipment.

Chapter 14 and 15, to describe Post-CMP Wafer Cleaning Equipment sales channel, distributors, customers, research findings and conclusion.

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