

# Global Semiconductor Cerium Oxide Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Semiconductor Cerium Oxide market size is expected to reach \$ 364 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

Semiconductor Cerium Oxide is a high-purity functional cerium dioxide ( $\text{CeO}_2$ ) material specifically designed for the semiconductor manufacturing industry. It was developed to address the stringent requirements of chemical mechanical planarization (CMP) processes, ensuring wafer surface flatness, smoothness, and defect control to maintain processing precision at the micro- and nanoscale and protect device performance. Semiconductor cerium oxide combines mechanical abrasion with chemical activity to efficiently remove excess material from wafer surfaces while minimizing scratches or localized damage. Its product history originates from the use of conventional cerium oxide powders in glass and optical polishing, and as the semiconductor industry has advanced, it has evolved into high-purity, highly uniform, and nanoparticle-dispersed materials dedicated to CMP applications. Upstream raw materials include rare earth minerals and high-purity cerium oxide powders, while midstream processes involve particle engineering, dispersion, and surface treatment to produce semiconductor-grade cerium oxide powders or slurries. Downstream applications encompass wafer CMP, photomask polishing, and precision ceramic substrate polishing in critical semiconductor fabrication processes. In 2025, the global production capacity of semiconductor cerium oxide is estimated at 65,000 tons, with a sales volume of 55,921 tons. The average selling price is approximately US\$3,800 per ton, and manufacturers' gross profit margin is in the range of 25%-35%.

In recent years, the market for semiconductor cerium oxide has shown steady growth, driven primarily by the global expansion of semiconductor manufacturing and process

upgrades. Downstream chip manufacturers have increasingly stringent requirements for wafer surface flatness, smoothness, and defect control, positioning high-purity cerium oxide as a critical material in CMP polishing, photomask polishing, and precision ceramic substrate finishing. Upstream, rare earth minerals and high-purity cerium oxide powders serve as raw materials, while midstream processing—including particle engineering, dispersion, and surface treatment—enhances product uniformity and performance to meet the stability and reliability demands of precision semiconductor fabrication. As industry focus on quality and batch consistency increases, suppliers are investing continuously in process control, particle size distribution, and chemical activity optimization, driving overall technological advancement in the market.

Looking forward, semiconductor cerium oxide will become further integrated into key stages of chip manufacturing alongside the development of advanced process nodes and high-end packaging technologies. With the growth of micro- and nanoscale processes and three-dimensional packaging, the performance requirements for high-purity, nanoparticle-dispersed cerium oxide materials will become more stringent, including control over particle size, surface modification, and doping systems. Technological iteration and innovation will serve as the core drivers of competition, while the adoption of green manufacturing and sustainability principles will push producers to optimize energy efficiency, raw material utilization, and waste management. The ability to develop and industrialize high-performance semiconductor cerium oxide will directly influence a company's competitiveness in the global CMP and precision polishing market.

Despite significant market potential, the semiconductor cerium oxide industry faces multiple constraints. Upstream stability of rare earth resources and refining capabilities affects material supply and purity, while the production of ultra-high-purity and nanoparticle-dispersed slurries requires complex particle engineering and stringent contamination control, creating high barriers for new entrants. Downstream chip fabrication demands extremely high standards for batch consistency, defect rates, and long-term stability, increasing pressures on quality management and supply chain coordination. Additionally, global trade policies, shifting industrial layouts, and rising environmental compliance costs pose further challenges to operational strategy and market expansion, collectively shaping the growth drivers and constraints of the semiconductor cerium oxide market.

This report studies the global Semiconductor Cerium Oxide production, demand, key manufacturers, and key regions.

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

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

Global Semiconductor Cerium Oxide total production and demand, 2021-2032, (Tons)

Global Semiconductor Cerium Oxide total production value, 2021-2032, (USD Million)

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

Global Semiconductor Cerium Oxide consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Semiconductor Cerium Oxide domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Cerium Oxide production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Semiconductor Cerium Oxide production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Semiconductor Cerium Oxide production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Semiconductor Cerium Oxide 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 Resonac, Merck KGaA (Versum Materials), Fujifilm, AGC, KC Tech, Fujimi Corporation, DuPont, Anjimirco Shanghai, Soulbrain, Dongjin Semichem, 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 Semiconductor Cerium Oxide 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 Semiconductor Cerium Oxide Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Semiconductor Cerium Oxide Market, Segmentation by Type:

Purity 2N

Purity 3N-4N

Purity 5N

#### Global Semiconductor Cerium Oxide Market, Segmentation by Particle Size:

Micron-Sized CeO<sub>2</sub>

Sub-Micron CeO<sub>2</sub>

Nanoparticle CeO<sub>2</sub>?

Global Semiconductor Cerium Oxide Market, Segmentation by Morphology:

Spherical Particles

Irregular/Flake Particles

Global Semiconductor Cerium Oxide Market, Segmentation by Application:

Ceria CMP Slurry

Solar Cell

Catalyst

Other

Companies Profiled:

Resonac

Merck KGaA (Versum Materials)

Fujifilm

AGC

KC Tech

Fujimi Corporation

DuPont

Anjimirco Shanghai

Soulbrain

Dongjin Semichem

Samsung SDI

ACE NANOCHEM

Saint-Gobain

Ferro (UWiZ Technology)

Shenzhen Angshite Technology

**Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Semiconductor Cerium Oxide Introduction
- 1.2 World Semiconductor Cerium Oxide Supply & Forecast
  - 1.2.1 World Semiconductor Cerium Oxide Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Semiconductor Cerium Oxide Production (2021-2032)
  - 1.2.3 World Semiconductor Cerium Oxide Pricing Trends (2021-2032)
- 1.3 World Semiconductor Cerium Oxide Production by Region (Based on Production Site)
  - 1.3.1 World Semiconductor Cerium Oxide Production Value by Region (2021-2032)
  - 1.3.2 World Semiconductor Cerium Oxide Production by Region (2021-2032)
  - 1.3.3 World Semiconductor Cerium Oxide Average Price by Region (2021-2032)
  - 1.3.4 North America Semiconductor Cerium Oxide Production (2021-2032)
  - 1.3.5 Europe Semiconductor Cerium Oxide Production (2021-2032)
  - 1.3.6 China Semiconductor Cerium Oxide Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Semiconductor Cerium Oxide Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Semiconductor Cerium Oxide Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Semiconductor Cerium Oxide Demand (2021-2032)
- 2.2 World Semiconductor Cerium Oxide Consumption by Region
  - 2.2.1 World Semiconductor Cerium Oxide Consumption by Region (2021-2026)
  - 2.2.2 World Semiconductor Cerium Oxide Consumption Forecast by Region (2027-2032)
- 2.3 United States Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.4 China Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.5 Europe Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.6 Japan Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.7 South Korea Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.8 ASEAN Semiconductor Cerium Oxide Consumption (2021-2032)
- 2.9 India Semiconductor Cerium Oxide Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Semiconductor Cerium Oxide Production Value by Manufacturer (2021-2026)
- 3.2 World Semiconductor Cerium Oxide Production by Manufacturer (2021-2026)
- 3.3 World Semiconductor Cerium Oxide Average Price by Manufacturer (2021-2026)
- 3.4 Semiconductor Cerium Oxide Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Semiconductor Cerium Oxide Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Semiconductor Cerium Oxide in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Semiconductor Cerium Oxide in 2025
- 3.6 Semiconductor Cerium Oxide Market: Overall Company Footprint Analysis
  - 3.6.1 Semiconductor Cerium Oxide Market: Region Footprint
  - 3.6.2 Semiconductor Cerium Oxide Market: Company Product Type Footprint
  - 3.6.3 Semiconductor Cerium Oxide Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Semiconductor Cerium Oxide Production Value Comparison
  - 4.1.1 United States VS China: Semiconductor Cerium Oxide Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Semiconductor Cerium Oxide Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Semiconductor Cerium Oxide Production Comparison
  - 4.2.1 United States VS China: Semiconductor Cerium Oxide Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Semiconductor Cerium Oxide Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Semiconductor Cerium Oxide Consumption Comparison
  - 4.3.1 United States VS China: Semiconductor Cerium Oxide Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Semiconductor Cerium Oxide Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Semiconductor Cerium Oxide Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Semiconductor Cerium Oxide Production Value (2021-2026)

4.4.3 United States Based Manufacturers Semiconductor Cerium Oxide Production (2021-2026)

4.5 China Based Semiconductor Cerium Oxide Manufacturers and Market Share

4.5.1 China Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Semiconductor Cerium Oxide Production Value (2021-2026)

4.5.3 China Based Manufacturers Semiconductor Cerium Oxide Production (2021-2026)

4.6 Rest of World Based Semiconductor Cerium Oxide Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Semiconductor Cerium Oxide Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Semiconductor Cerium Oxide Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Semiconductor Cerium Oxide Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Purity ?2N

5.2.2 Purity 3N-4N

5.2.3 Purity ?5N

5.3 Market Segment by Type

5.3.1 World Semiconductor Cerium Oxide Production by Type (2021-2032)

5.3.2 World Semiconductor Cerium Oxide Production Value by Type (2021-2032)

5.3.3 World Semiconductor Cerium Oxide Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY PARTICLE SIZE**

6.1 World Semiconductor Cerium Oxide Market Size Overview by Particle Size: 2021 VS 2025 VS 2032

## 6.2 Segment Introduction by Particle Size

6.2.1 Micron-Sized CeO<sub>2</sub>

6.2.2 Sub-Micron CeO<sub>2</sub>

6.2.3 Nanoparticle CeO<sub>2</sub>

## 6.3 Market Segment by Particle Size

6.3.1 World Semiconductor Cerium Oxide Production by Particle Size (2021-2032)

6.3.2 World Semiconductor Cerium Oxide Production Value by Particle Size (2021-2032)

6.3.3 World Semiconductor Cerium Oxide Average Price by Particle Size (2021-2032)

## 7 MARKET ANALYSIS BY MORPHOLOGY

7.1 World Semiconductor Cerium Oxide Market Size Overview by Morphology: 2021 VS 2025 VS 2032

### 7.2 Segment Introduction by Morphology

7.2.1 Spherical Particles

7.2.2 Irregular/Flake Particles

### 7.3 Market Segment by Morphology

7.3.1 World Semiconductor Cerium Oxide Production by Morphology (2021-2032)

7.3.2 World Semiconductor Cerium Oxide Production Value by Morphology (2021-2032)

7.3.3 World Semiconductor Cerium Oxide Average Price by Morphology (2021-2032)

## 8 MARKET ANALYSIS BY APPLICATION

8.1 World Semiconductor Cerium Oxide Market Size Overview by Application: 2021 VS 2025 VS 2032

### 8.2 Segment Introduction by Application

8.2.1 Ceria CMP Slurry

8.2.2 Solar Cell

8.2.3 Catalyst

8.2.4 Other

### 8.3 Market Segment by Application

8.3.1 World Semiconductor Cerium Oxide Production by Application (2021-2032)

8.3.2 World Semiconductor Cerium Oxide Production Value by Application (2021-2032)

8.3.3 World Semiconductor Cerium Oxide Average Price by Application (2021-2032)

## 9 COMPANY PROFILES

## 9.1 Resonac

9.1.1 Resonac Details

9.1.2 Resonac Major Business

9.1.3 Resonac Semiconductor Cerium Oxide Product and Services

9.1.4 Resonac Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Resonac Recent Developments/Updates

9.1.6 Resonac Competitive Strengths & Weaknesses

## 9.2 Merck KGaA (Versum Materials)

9.2.1 Merck KGaA (Versum Materials) Details

9.2.2 Merck KGaA (Versum Materials) Major Business

9.2.3 Merck KGaA (Versum Materials) Semiconductor Cerium Oxide Product and Services

9.2.4 Merck KGaA (Versum Materials) Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Merck KGaA (Versum Materials) Recent Developments/Updates

9.2.6 Merck KGaA (Versum Materials) Competitive Strengths & Weaknesses

## 9.3 Fujifilm

9.3.1 Fujifilm Details

9.3.2 Fujifilm Major Business

9.3.3 Fujifilm Semiconductor Cerium Oxide Product and Services

9.3.4 Fujifilm Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Fujifilm Recent Developments/Updates

9.3.6 Fujifilm Competitive Strengths & Weaknesses

## 9.4 AGC

9.4.1 AGC Details

9.4.2 AGC Major Business

9.4.3 AGC Semiconductor Cerium Oxide Product and Services

9.4.4 AGC Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 AGC Recent Developments/Updates

9.4.6 AGC Competitive Strengths & Weaknesses

## 9.5 KC Tech

9.5.1 KC Tech Details

9.5.2 KC Tech Major Business

9.5.3 KC Tech Semiconductor Cerium Oxide Product and Services

9.5.4 KC Tech Semiconductor Cerium Oxide Production, Price, Value, Gross Margin

and Market Share (2021-2026)

9.5.5 KC Tech Recent Developments/Updates

9.5.6 KC Tech Competitive Strengths & Weaknesses

9.6 Fujimi Corporation

9.6.1 Fujimi Corporation Details

9.6.2 Fujimi Corporation Major Business

9.6.3 Fujimi Corporation Semiconductor Cerium Oxide Product and Services

9.6.4 Fujimi Corporation Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Fujimi Corporation Recent Developments/Updates

9.6.6 Fujimi Corporation Competitive Strengths & Weaknesses

9.7 DuPont

9.7.1 DuPont Details

9.7.2 DuPont Major Business

9.7.3 DuPont Semiconductor Cerium Oxide Product and Services

9.7.4 DuPont Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 DuPont Recent Developments/Updates

9.7.6 DuPont Competitive Strengths & Weaknesses

9.8 Anjimirco Shanghai

9.8.1 Anjimirco Shanghai Details

9.8.2 Anjimirco Shanghai Major Business

9.8.3 Anjimirco Shanghai Semiconductor Cerium Oxide Product and Services

9.8.4 Anjimirco Shanghai Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Anjimirco Shanghai Recent Developments/Updates

9.8.6 Anjimirco Shanghai Competitive Strengths & Weaknesses

9.9 Soulbrain

9.9.1 Soulbrain Details

9.9.2 Soulbrain Major Business

9.9.3 Soulbrain Semiconductor Cerium Oxide Product and Services

9.9.4 Soulbrain Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Soulbrain Recent Developments/Updates

9.9.6 Soulbrain Competitive Strengths & Weaknesses

9.10 Dongjin Semichem

9.10.1 Dongjin Semichem Details

9.10.2 Dongjin Semichem Major Business

9.10.3 Dongjin Semichem Semiconductor Cerium Oxide Product and Services

9.10.4 Dongjin Semichem Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Dongjin Semichem Recent Developments/Updates

9.10.6 Dongjin Semichem Competitive Strengths & Weaknesses

9.11 Samsung SDI

9.11.1 Samsung SDI Details

9.11.2 Samsung SDI Major Business

9.11.3 Samsung SDI Semiconductor Cerium Oxide Product and Services

9.11.4 Samsung SDI Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Samsung SDI Recent Developments/Updates

9.11.6 Samsung SDI Competitive Strengths & Weaknesses

9.12 ACE NANOCHEM

9.12.1 ACE NANOCHEM Details

9.12.2 ACE NANOCHEM Major Business

9.12.3 ACE NANOCHEM Semiconductor Cerium Oxide Product and Services

9.12.4 ACE NANOCHEM Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 ACE NANOCHEM Recent Developments/Updates

9.12.6 ACE NANOCHEM Competitive Strengths & Weaknesses

9.13 Saint-Gobain

9.13.1 Saint-Gobain Details

9.13.2 Saint-Gobain Major Business

9.13.3 Saint-Gobain Semiconductor Cerium Oxide Product and Services

9.13.4 Saint-Gobain Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Saint-Gobain Recent Developments/Updates

9.13.6 Saint-Gobain Competitive Strengths & Weaknesses

9.14 Ferro (UWiZ Technology)

9.14.1 Ferro (UWiZ Technology) Details

9.14.2 Ferro (UWiZ Technology) Major Business

9.14.3 Ferro (UWiZ Technology) Semiconductor Cerium Oxide Product and Services

9.14.4 Ferro (UWiZ Technology) Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Ferro (UWiZ Technology) Recent Developments/Updates

9.14.6 Ferro (UWiZ Technology) Competitive Strengths & Weaknesses

9.15 Shenzhen Angshite Technology

9.15.1 Shenzhen Angshite Technology Details

9.15.2 Shenzhen Angshite Technology Major Business

9.15.3 Shenzhen Angshite Technology Semiconductor Cerium Oxide Product and Services

9.15.4 Shenzhen Angshite Technology Semiconductor Cerium Oxide Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Shenzhen Angshite Technology Recent Developments/Updates

9.15.6 Shenzhen Angshite Technology Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

10.1 Semiconductor Cerium Oxide Industry Chain

10.2 Semiconductor Cerium Oxide Upstream Analysis

10.2.1 Semiconductor Cerium Oxide Core Raw Materials

10.2.2 Main Manufacturers of Semiconductor Cerium Oxide Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Semiconductor Cerium Oxide Production Mode

10.6 Semiconductor Cerium Oxide Procurement Model

10.7 Semiconductor Cerium Oxide Industry Sales Model and Sales Channels

10.7.1 Semiconductor Cerium Oxide Sales Model

10.7.2 Semiconductor Cerium Oxide Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Semiconductor Cerium Oxide Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Semiconductor Cerium Oxide Production Value by Region (2021-2026) & (USD Million)

Table 3. World Semiconductor Cerium Oxide Production Value by Region (2027-2032) & (USD Million)

Table 4. World Semiconductor Cerium Oxide Production Value Market Share by Region (2021-2026)

Table 5. World Semiconductor Cerium Oxide Production Value Market Share by Region (2027-2032)

Table 6. World Semiconductor Cerium Oxide Production by Region (2021-2026) & (Tons)

Table 7. World Semiconductor Cerium Oxide Production by Region (2027-2032) & (Tons)

Table 8. World Semiconductor Cerium Oxide Production Market Share by Region (2021-2026)

Table 9. World Semiconductor Cerium Oxide Production Market Share by Region (2027-2032)

Table 10. World Semiconductor Cerium Oxide Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Semiconductor Cerium Oxide Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Semiconductor Cerium Oxide Major Market Trends

Table 13. World Semiconductor Cerium Oxide Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Semiconductor Cerium Oxide Consumption by Region (2021-2026) & (Tons)

Table 15. World Semiconductor Cerium Oxide Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Semiconductor Cerium Oxide Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Semiconductor Cerium Oxide Producers in 2025

Table 18. World Semiconductor Cerium Oxide Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Semiconductor Cerium Oxide Producers in 2025

Table 20. World Semiconductor Cerium Oxide Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Semiconductor Cerium Oxide Company Evaluation Quadrant

Table 22. World Semiconductor Cerium Oxide Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Semiconductor Cerium Oxide Production Site of Key Manufacturer

Table 24. Semiconductor Cerium Oxide Market: Company Product Type Footprint

Table 25. Semiconductor Cerium Oxide Market: Company Product Application Footprint

Table 26. Semiconductor Cerium Oxide Competitive Factors

Table 27. Semiconductor Cerium Oxide New Entrant and Capacity Expansion Plans

Table 28. Semiconductor Cerium Oxide Mergers & Acquisitions Activity

Table 29. United States VS China Semiconductor Cerium Oxide Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Semiconductor Cerium Oxide Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Semiconductor Cerium Oxide Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Semiconductor Cerium Oxide Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Semiconductor Cerium Oxide Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Semiconductor Cerium Oxide Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Semiconductor Cerium Oxide Production Market Share (2021-2026)

Table 37. China Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Semiconductor Cerium Oxide Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Semiconductor Cerium Oxide Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Semiconductor Cerium Oxide Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Semiconductor Cerium Oxide Production Market

Share (2021-2026)

Table 42. Rest of World Based Semiconductor Cerium Oxide Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Semiconductor Cerium Oxide Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Semiconductor Cerium Oxide Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Semiconductor Cerium Oxide Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Semiconductor Cerium Oxide Production Market Share (2021-2026)

Table 47. World Semiconductor Cerium Oxide Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Semiconductor Cerium Oxide Production by Type (2021-2026) & (Tons)

Table 49. World Semiconductor Cerium Oxide Production by Type (2027-2032) & (Tons)

Table 50. World Semiconductor Cerium Oxide Production Value by Type (2021-2026) & (USD Million)

Table 51. World Semiconductor Cerium Oxide Production Value by Type (2027-2032) & (USD Million)

Table 52. World Semiconductor Cerium Oxide Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Semiconductor Cerium Oxide Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Semiconductor Cerium Oxide Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Table 55. World Semiconductor Cerium Oxide Production by Particle Size (2021-2026) & (Tons)

Table 56. World Semiconductor Cerium Oxide Production by Particle Size (2027-2032) & (Tons)

Table 57. World Semiconductor Cerium Oxide Production Value by Particle Size (2021-2026) & (USD Million)

Table 58. World Semiconductor Cerium Oxide Production Value by Particle Size (2027-2032) & (USD Million)

Table 59. World Semiconductor Cerium Oxide Average Price by Particle Size (2021-2026) & (US\$/Ton)

Table 60. World Semiconductor Cerium Oxide Average Price by Particle Size (2027-2032) & (US\$/Ton)

Table 61. World Semiconductor Cerium Oxide Production Value by Morphology, (USD Million), 2021 & 2025 & 2032

Table 62. World Semiconductor Cerium Oxide Production by Morphology (2021-2026) & (Tons)

Table 63. World Semiconductor Cerium Oxide Production by Morphology (2027-2032) & (Tons)

Table 64. World Semiconductor Cerium Oxide Production Value by Morphology (2021-2026) & (USD Million)

Table 65. World Semiconductor Cerium Oxide Production Value by Morphology (2027-2032) & (USD Million)

Table 66. World Semiconductor Cerium Oxide Average Price by Morphology (2021-2026) & (US\$/Ton)

Table 67. World Semiconductor Cerium Oxide Average Price by Morphology (2027-2032) & (US\$/Ton)

Table 68. World Semiconductor Cerium Oxide Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Semiconductor Cerium Oxide Production by Application (2021-2026) & (Tons)

Table 70. World Semiconductor Cerium Oxide Production by Application (2027-2032) & (Tons)

Table 71. World Semiconductor Cerium Oxide Production Value by Application (2021-2026) & (USD Million)

Table 72. World Semiconductor Cerium Oxide Production Value by Application (2027-2032) & (USD Million)

Table 73. World Semiconductor Cerium Oxide Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Semiconductor Cerium Oxide Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Resonac Basic Information, Manufacturing Base and Competitors

Table 76. Resonac Major Business

Table 77. Resonac Semiconductor Cerium Oxide Product and Services

Table 78. Resonac Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Resonac Recent Developments/Updates

Table 80. Resonac Competitive Strengths & Weaknesses

Table 81. Merck KGaA (Versum Materials) Basic Information, Manufacturing Base and Competitors

Table 82. Merck KGaA (Versum Materials) Major Business

Table 83. Merck KGaA (Versum Materials) Semiconductor Cerium Oxide Product and

## Services

Table 84. Merck KGaA (Versum Materials) Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Merck KGaA (Versum Materials) Recent Developments/Updates

Table 86. Merck KGaA (Versum Materials) Competitive Strengths & Weaknesses

Table 87. Fujifilm Basic Information, Manufacturing Base and Competitors

Table 88. Fujifilm Major Business

Table 89. Fujifilm Semiconductor Cerium Oxide Product and Services

Table 90. Fujifilm Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Fujifilm Recent Developments/Updates

Table 92. Fujifilm Competitive Strengths & Weaknesses

Table 93. AGC Basic Information, Manufacturing Base and Competitors

Table 94. AGC Major Business

Table 95. AGC Semiconductor Cerium Oxide Product and Services

Table 96. AGC Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. AGC Recent Developments/Updates

Table 98. AGC Competitive Strengths & Weaknesses

Table 99. KC Tech Basic Information, Manufacturing Base and Competitors

Table 100. KC Tech Major Business

Table 101. KC Tech Semiconductor Cerium Oxide Product and Services

Table 102. KC Tech Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. KC Tech Recent Developments/Updates

Table 104. KC Tech Competitive Strengths & Weaknesses

Table 105. Fujimi Corporation Basic Information, Manufacturing Base and Competitors

Table 106. Fujimi Corporation Major Business

Table 107. Fujimi Corporation Semiconductor Cerium Oxide Product and Services

Table 108. Fujimi Corporation Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Fujimi Corporation Recent Developments/Updates

Table 110. Fujimi Corporation Competitive Strengths & Weaknesses

Table 111. DuPont Basic Information, Manufacturing Base and Competitors

Table 112. DuPont Major Business

Table 113. DuPont Semiconductor Cerium Oxide Product and Services

Table 114. DuPont Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. DuPont Recent Developments/Updates

Table 116. DuPont Competitive Strengths & Weaknesses

Table 117. Anjimirco Shanghai Basic Information, Manufacturing Base and Competitors

Table 118. Anjimirco Shanghai Major Business

Table 119. Anjimirco Shanghai Semiconductor Cerium Oxide Product and Services

Table 120. Anjimirco Shanghai Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Anjimirco Shanghai Recent Developments/Updates

Table 122. Anjimirco Shanghai Competitive Strengths & Weaknesses

Table 123. Soulbrain Basic Information, Manufacturing Base and Competitors

Table 124. Soulbrain Major Business

Table 125. Soulbrain Semiconductor Cerium Oxide Product and Services

Table 126. Soulbrain Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Soulbrain Recent Developments/Updates

Table 128. Soulbrain Competitive Strengths & Weaknesses

Table 129. Dongjin Semichem Basic Information, Manufacturing Base and Competitors

Table 130. Dongjin Semichem Major Business

Table 131. Dongjin Semichem Semiconductor Cerium Oxide Product and Services

Table 132. Dongjin Semichem Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Dongjin Semichem Recent Developments/Updates

Table 134. Dongjin Semichem Competitive Strengths & Weaknesses

Table 135. Samsung SDI Basic Information, Manufacturing Base and Competitors

Table 136. Samsung SDI Major Business

Table 137. Samsung SDI Semiconductor Cerium Oxide Product and Services

Table 138. Samsung SDI Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Samsung SDI Recent Developments/Updates

Table 140. Samsung SDI Competitive Strengths & Weaknesses

Table 141. ACE NANOCHEM Basic Information, Manufacturing Base and Competitors

Table 142. ACE NANOCHEM Major Business

Table 143. ACE NANOCHEM Semiconductor Cerium Oxide Product and Services

Table 144. ACE NANOCHEM Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 145. ACE NANOCHEM Recent Developments/Updates

Table 146. ACE NANOCHEM Competitive Strengths & Weaknesses

Table 147. Saint-Gobain Basic Information, Manufacturing Base and Competitors

Table 148. Saint-Gobain Major Business

Table 149. Saint-Gobain Semiconductor Cerium Oxide Product and Services

Table 150. Saint-Gobain Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 151. Saint-Gobain Recent Developments/Updates

Table 152. Saint-Gobain Competitive Strengths & Weaknesses

Table 153. Ferro (UWiZ Technology) Basic Information, Manufacturing Base and Competitors

Table 154. Ferro (UWiZ Technology) Major Business

Table 155. Ferro (UWiZ Technology) Semiconductor Cerium Oxide Product and Services

Table 156. Ferro (UWiZ Technology) Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 157. Ferro (UWiZ Technology) Recent Developments/Updates

Table 158. Ferro (UWiZ Technology) Competitive Strengths & Weaknesses

Table 159. Shenzhen Angshite Technology Basic Information, Manufacturing Base and Competitors

Table 160. Shenzhen Angshite Technology Major Business

Table 161. Shenzhen Angshite Technology Semiconductor Cerium Oxide Product and Services

Table 162. Shenzhen Angshite Technology Semiconductor Cerium Oxide Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Shenzhen Angshite Technology Recent Developments/Updates

Table 164. Shenzhen Angshite Technology Competitive Strengths & Weaknesses

Table 165. Global Key Players of Semiconductor Cerium Oxide Upstream (Raw Materials)

Table 166. Global Semiconductor Cerium Oxide Typical Customers

Table 167. Semiconductor Cerium Oxide Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Semiconductor Cerium Oxide Picture

Figure 2. World Semiconductor Cerium Oxide Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Semiconductor Cerium Oxide Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Semiconductor Cerium Oxide Production (2021-2032) & (Tons)

Figure 5. World Semiconductor Cerium Oxide Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Semiconductor Cerium Oxide Production Value Market Share by Region (2021-2032)

Figure 7. World Semiconductor Cerium Oxide Production Market Share by Region (2021-2032)

Figure 8. North America Semiconductor Cerium Oxide Production (2021-2032) & (Tons)

Figure 9. Europe Semiconductor Cerium Oxide Production (2021-2032) & (Tons)

Figure 10. China Semiconductor Cerium Oxide Production (2021-2032) & (Tons)

Figure 11. Semiconductor Cerium Oxide Market Drivers

Figure 12. Factors Affecting Demand

Figure 13. World Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 14. World Semiconductor Cerium Oxide Consumption Market Share by Region (2021-2032)

Figure 15. United States Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 16. China Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 17. Europe Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 18. Japan Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 19. South Korea Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 20. ASEAN Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 21. India Semiconductor Cerium Oxide Consumption (2021-2032) & (Tons)

Figure 22. Producer Shipments of Semiconductor Cerium Oxide by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 23. Global Four-firm Concentration Ratios (CR4) for Semiconductor Cerium Oxide Markets in 2025

Figure 24. Global Four-firm Concentration Ratios (CR8) for Semiconductor Cerium Oxide Markets in 2025

Figure 25. United States VS China: Semiconductor Cerium Oxide Production Value

Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: Semiconductor Cerium Oxide Production Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Semiconductor Cerium Oxide Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers Semiconductor Cerium Oxide Production Market Share 2025

Figure 29. China Based Manufacturers Semiconductor Cerium Oxide Production Market Share 2025

Figure 30. Rest of World Based Manufacturers Semiconductor Cerium Oxide Production Market Share 2025

Figure 31. World Semiconductor Cerium Oxide Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 32. World Semiconductor Cerium Oxide Production Value Market Share by Type in 2025

Figure 33. Purity ?2N

Figure 34. Purity 3N-4N

Figure 35. Purity ?5N

Figure 36. World Semiconductor Cerium Oxide Production Market Share by Type (2021-2032)

Figure 37. World Semiconductor Cerium Oxide Production Value Market Share by Type (2021-2032)

Figure 38. World Semiconductor Cerium Oxide Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World Semiconductor Cerium Oxide Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Figure 40. World Semiconductor Cerium Oxide Production Value Market Share by Particle Size in 2025

Figure 41. Micron-Sized CeO?

Figure 42. Sub-Micron CeO?

Figure 43. Nanoparticle CeO?

Figure 44. World Semiconductor Cerium Oxide Production Market Share by Particle Size (2021-2032)

Figure 45. World Semiconductor Cerium Oxide Production Value Market Share by Particle Size (2021-2032)

Figure 46. World Semiconductor Cerium Oxide Average Price by Particle Size (2021-2032) & (US\$/Ton)

Figure 47. World Semiconductor Cerium Oxide Production Value by Morphology, (USD Million), 2021 & 2025 & 2032

Figure 48. World Semiconductor Cerium Oxide Production Value Market Share by Morphology in 2025

Figure 49. Spherical Particles

Figure 50. Irregular/Flake Particles

Figure 51. World Semiconductor Cerium Oxide Production Market Share by Morphology (2021-2032)

Figure 52. World Semiconductor Cerium Oxide Production Value Market Share by Morphology (2021-2032)

Figure 53. World Semiconductor Cerium Oxide Average Price by Morphology (2021-2032) & (US\$/Ton)

Figure 54. World Semiconductor Cerium Oxide Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Semiconductor Cerium Oxide Production Value Market Share by Application in 2025

Figure 56. Ceria CMP Slurry

Figure 57. Solar Cell

Figure 58. Catalyst

Figure 59. Other

Figure 60. World Semiconductor Cerium Oxide Production Market Share by Application (2021-2032)

Figure 61. World Semiconductor Cerium Oxide Production Value Market Share by Application (2021-2032)

Figure 62. World Semiconductor Cerium Oxide Average Price by Application (2021-2032) & (US\$/Ton)

Figure 63. Semiconductor Cerium Oxide Industry Chain

Figure 64. Semiconductor Cerium Oxide Procurement Model

Figure 65. Semiconductor Cerium Oxide Sales Model

Figure 66. Semiconductor Cerium Oxide Sales Channels, Direct Sales, and Distribution

Figure 67. Methodology

Figure 68. Research Process and Data Source

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