

Global Semiconductor CMP Equipment Components Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor CMP Equipment Components market size is expected to reach \$ 1782 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

Semiconductor CMP equipment components/parts refer to specialized components installed in chemical mechanical planarization tools and integrated post-CMP cleaning modules. These components directly affect wafer planarity, removal-rate stability, within-wafer uniformity, defect control, consumable lifetime and equipment uptime. The scope mainly covers process-contact wear parts and engineered replacement parts used in polishing heads, platen and conditioning modules, wafer carrier assemblies, post-CMP cleaning modules and related motion or fixture systems. Typical products include CMP pad conditioners or diamond disks, retaining rings or retainer rings, PVA sponge brushes, carrier-head related parts, conditioning-arm components, polishing-head assemblies and CMP-specific engineered plastic parts. These products require high cleanliness, low particle generation, chemical resistance, dimensional stability, controlled wear behavior, batch-to-batch consistency and tool-platform compatibility, making them an important process-critical component category within the semiconductor equipment supply chain.

Semiconductor CMP equipment components should be viewed as a multi-layer component ecosystem rather than a single product category. CMP pad conditioners or diamond disks support pad surface regeneration and removal-rate stability; retaining rings influence wafer edge control and polishing uniformity; PVA brushes and post-CMP cleaning components are critical for particle and residue removal after planarization. Compared with CMP slurry and polishing pads, this component market is smaller in absolute size, but it has stronger tool-platform dependency, longer qualification cycles,

higher switching cost and tighter process-control requirements. It is therefore a specialized, high-stickiness component market within the broader wafer fabrication equipment supply chain.

From the supply side, the global market is structured around four groups: original CMP equipment OEMs, specialized conditioner and cleaning component suppliers, engineered plastic component manufacturers, and regional third-party replacement-part suppliers. Applied Materials, EBARA and ACCRETECH retain strong positions through original equipment platforms and proprietary spare parts. 3M, Saesol, KINIK, EHWA, Shinhan and Diamonex are more visible in CMP pad conditioners. DuraTek, ARC Precision, Calitech, IST, Fluorocarbon and Atlas Fibre are relevant in retaining rings and engineered plastic CMP wear parts. Entegris, AION and Puri-Science are more visible in PVA brushes and post-CMP cleaning components. This explains why the broad longlist is materially wider than the core formal list: the former captures all relevant supply-chain signals, while the latter requires stronger evidence of actual manufacturing or process-critical supply.

Demand growth is mainly driven by advanced logic and memory process complexity, 300mm fab expansion, higher CMP step counts, tighter defect-control requirements and the increasing importance of post-CMP cleaning. Advanced packaging, TSV, hybrid bonding-related surface preparation and redistribution-layer processes also provide incremental demand for specialized planarization and cleaning components. As process windows become narrower, customers increasingly require better particle control, lower contamination, tighter dimensional repeatability and more stable component lifetime. This shifts supplier competition from simple machining capability to a broader combination of material science, clean manufacturing, tool-interface knowledge and wafer-fab qualification support.

Regionally, the United States, Japan, South Korea and Taiwan remain the core supply bases. Mainland China is moving from product availability toward customer qualification and scale-up. Chinese suppliers have visible product evidence in CMP-DISK, PEEK / PI retaining rings and engineered plastic parts, but they still need to demonstrate stable long-term performance in advanced fabs, platform compatibility and batch consistency. Over the next several years, competition will likely intensify between OEM original parts, qualified third-party replacement parts and localized alternatives. The strongest suppliers will be those that can combine process know-how, tool compatibility, clean manufacturing and reliable supply-chain execution.

This report studies the global Semiconductor CMP Equipment Components demand,

key companies, and key regions.

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

Highlights and key features of the study

Global Semiconductor CMP Equipment Components total market, 2021-2032, (USD Million)

Global Semiconductor CMP Equipment Components total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Semiconductor CMP Equipment Components total market, key domestic companies, and share, (USD Million)

Global Semiconductor CMP Equipment Components revenue by player, revenue and market share 2021-2026, (USD Million)

Global Semiconductor CMP Equipment Components total market By Product Type, CAGR, 2021-2032, (USD Million)

Global Semiconductor CMP Equipment Components total market By Wafer Size, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Semiconductor CMP Equipment Components market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Applied Materials, EBARA Corporation, Entegris, 3M, Saesol Diamond, KINIK Company, Entrepix, EHWA Diamond, ACCRETECH, Shinhan Diamond, 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 CMP Equipment Components market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), by player, by regions, By Product Type, and By Wafer Size. 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 CMP Equipment Components Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor CMP Equipment Components Market, Segmentation By Product Type:

CMP Pad Conditioners / Diamond Disks

CMP Retaining Rings / Retainer Rings

CMP Head / Carrier Head Parts

CMP Brushes / Post-CMP PVA Brushes

CMP Tool-Specific Engineered Plastic Parts

Other CMP Tool-Specific Spare Parts

Global Semiconductor CMP Equipment Components Market, Segmentation By Supply Model:

OEM Original Spare Parts

Qualified Third-Party Replacement Parts

Global Semiconductor CMP Equipment Components Market, Segmentation By Device Application:

Logic / Foundry CMP Components

DRAM CMP Components

3D NAND CMP Components

Power / Analog / MEMS CMP Components

Advanced Packaging CMP Components

Other Specialty Device CMP Components

Global Semiconductor CMP Equipment Components Market, Segmentation By Wafer Size:

300mm CMP Tool Components

200mm CMP Tool Components

Others

Companies Profiled:

Applied Materials

EBARA Corporation

Entegris

3M

Saesol Diamond

KINIK Company

Entrepix

EHWA Diamond

ACCRETECH

Shinhan Diamond

Diamonex / BEST

DuraTek

AION

ARC Precision

Calitech

IST

Puri-Science

Nanjing Sanchao

Fluorocarbon Group

Junhua PEEK

Showa Industries

Atlas Fibre

MOS

Materials Nano Engineering (MNE)

Nippon Steel & Sumikin Materials

Willbe S&T

Cnus Co., Ltd.

UIS Technologies

Euroshore

PTC, Inc.

AKT Components Sdn Bhd

Ensinger

Pall

Cobetter

Warde Tec

IV Technologies Co.,Ltd

Pasco Precision Corp

Konfoong Materials International (KFMI)

Jetway Technologies

Chia Ping Diamond Industrial Co., Ltd.

Ferrotec (Anhui) Technology Development Co., Ltd

Key Questions Answered

1. How big is the global Semiconductor CMP Equipment Components market?
2. What is the demand of the global Semiconductor CMP Equipment Components market?
3. What is the year over year growth of the global Semiconductor CMP Equipment Components market?
4. What is the total value of the global Semiconductor CMP Equipment Components market?
5. Who are the Major Players in the global Semiconductor CMP Equipment Components market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Semiconductor CMP Equipment Components Introduction

1.2 World Semiconductor CMP Equipment Components Market Size & Forecast (2021 & 2025 & 2032)

1.3 World Semiconductor CMP Equipment Components Total Market by Region (by Headquarter Location)

1.3.1 World Semiconductor CMP Equipment Components Market Size by Region (2021-2032), (by Headquarter Location)

1.3.2 United States Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.3 China Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.4 Europe Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.5 Japan Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.6 South Korea Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.7 ASEAN Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.3.8 India Based Company Semiconductor CMP Equipment Components Revenue (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Semiconductor CMP Equipment Components Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.2 World Semiconductor CMP Equipment Components Consumption Value by Region

2.2.1 World Semiconductor CMP Equipment Components Consumption Value by Region (2021-2026)

2.2.2 World Semiconductor CMP Equipment Components Consumption Value Forecast by Region (2027-2032)

2.3 United States Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.4 China Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.5 Europe Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.6 Japan Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.7 South Korea Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.8 ASEAN Semiconductor CMP Equipment Components Consumption Value (2021-2032)

2.9 India Semiconductor CMP Equipment Components Consumption Value (2021-2032)

3 WORLD SEMICONDUCTOR CMP EQUIPMENT COMPONENTS COMPANIES COMPETITIVE ANALYSIS

3.1 World Semiconductor CMP Equipment Components Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Semiconductor CMP Equipment Components Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Semiconductor CMP Equipment Components in 2025

3.2.3 Global Concentration Ratios (CR8) for Semiconductor CMP Equipment Components in 2025

3.3 Semiconductor CMP Equipment Components Company Evaluation Quadrant

3.4 Semiconductor CMP Equipment Components Market: Overall Company Footprint Analysis

3.4.1 Semiconductor CMP Equipment Components Market: Region Footprint

3.4.2 Semiconductor CMP Equipment Components Market: Company Product Type Footprint

3.4.3 Semiconductor CMP Equipment Components Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Semiconductor CMP Equipment Components Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Semiconductor CMP Equipment Components Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Semiconductor CMP Equipment Components Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Semiconductor CMP Equipment Components Consumption Value Comparison

4.2.1 United States VS China: Semiconductor CMP Equipment Components Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Semiconductor CMP Equipment Components Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Semiconductor CMP Equipment Components Companies and Market Share, 2021-2026

4.3.1 United States Based Semiconductor CMP Equipment Components Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Semiconductor CMP Equipment Components Revenue, (2021-2026)

4.4 China Based Companies Semiconductor CMP Equipment Components Revenue and Market Share, 2021-2026

4.4.1 China Based Semiconductor CMP Equipment Components Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Semiconductor CMP Equipment Components Revenue, (2021-2026)

4.5 Rest of World Based Semiconductor CMP Equipment Components Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Semiconductor CMP Equipment Components Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Semiconductor CMP Equipment Components Revenue (2021-2026)

5 MARKET ANALYSIS BY PRODUCT TYPE

5.1 World Semiconductor CMP Equipment Components Market Size Overview By

Product Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction By Product Type

- 5.2.1 CMP Pad Conditioners / Diamond Disks
- 5.2.2 CMP Retaining Rings / Retainer Rings
- 5.2.3 CMP Head / Carrier Head Parts
- 5.2.4 CMP Brushes / Post-CMP PVA Brushes
- 5.2.5 CMP Tool-Specific Engineered Plastic Parts
- 5.2.6 Other CMP Tool-Specific Spare Parts

5.3 Market Segment By Product Type

- 5.3.1 World Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026)
- 5.3.2 World Semiconductor CMP Equipment Components Market Size By Product Type (2027-2032)
- 5.3.3 World Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2027-2032)

6 MARKET ANALYSIS BY SUPPLY MODEL

6.1 World Semiconductor CMP Equipment Components Market Size Overview By Supply Model: 2021 VS 2025 VS 2032

6.2 Segment Introduction By Supply Model

- 6.2.1 OEM Original Spare Parts
- 6.2.2 Qualified Third-Party Replacement Parts

6.3 Market Segment By Supply Model

- 6.3.1 World Semiconductor CMP Equipment Components Market Size By Supply Model (2021-2026)
- 6.3.2 World Semiconductor CMP Equipment Components Market Size By Supply Model (2027-2032)
- 6.3.3 World Semiconductor CMP Equipment Components Market Size Market Share By Supply Model (2027-2032)

7 MARKET ANALYSIS BY DEVICE APPLICATION

7.1 World Semiconductor CMP Equipment Components Market Size Overview By Device Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction By Device Application

- 7.2.1 Logic / Foundry CMP Components
- 7.2.2 DRAM CMP Components
- 7.2.3 3D NAND CMP Components

- 7.2.4 Power / Analog / MEMS CMP Components
- 7.2.5 Advanced Packaging CMP Components
- 7.2.6 Other Specialty Device CMP Components
- 7.3 Market Segment By Device Application
 - 7.3.1 World Semiconductor CMP Equipment Components Market Size By Device Application (2021-2026)
 - 7.3.2 World Semiconductor CMP Equipment Components Market Size By Device Application (2027-2032)
 - 7.3.3 World Semiconductor CMP Equipment Components Market Size Market Share By Device Application (2027-2032)

8 MARKET ANALYSIS BY WAFER SIZE

- 8.1 World Semiconductor CMP Equipment Components Market Size Overview By Wafer Size: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction By Wafer Size
 - 8.2.1 300mm CMP Tool Components
 - 8.2.2 200mm CMP Tool Components
 - 8.2.3 Others
- 8.3 Market Segment By Wafer Size
 - 8.3.1 World Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026)
 - 8.3.2 World Semiconductor CMP Equipment Components Market Size By Wafer Size (2027-2032)
 - 8.3.3 World Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2032)

9 COMPANY PROFILES

- 9.1 Applied Materials
 - 9.1.1 Applied Materials Details
 - 9.1.2 Applied Materials Major Business
 - 9.1.3 Applied Materials Semiconductor CMP Equipment Components Product and Services
 - 9.1.4 Applied Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.1.5 Applied Materials Recent Developments/Updates
 - 9.1.6 Applied Materials Competitive Strengths & Weaknesses
- 9.2 EBARA Corporation

- 9.2.1 EBARA Corporation Details
- 9.2.2 EBARA Corporation Major Business
- 9.2.3 EBARA Corporation Semiconductor CMP Equipment Components Product and Services
- 9.2.4 EBARA Corporation Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
- 9.2.5 EBARA Corporation Recent Developments/Updates
- 9.2.6 EBARA Corporation Competitive Strengths & Weaknesses
- 9.3 Entegris
 - 9.3.1 Entegris Details
 - 9.3.2 Entegris Major Business
 - 9.3.3 Entegris Semiconductor CMP Equipment Components Product and Services
 - 9.3.4 Entegris Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Entegris Recent Developments/Updates
 - 9.3.6 Entegris Competitive Strengths & Weaknesses
- 9.4 3M
 - 9.4.1 3M Details
 - 9.4.2 3M Major Business
 - 9.4.3 3M Semiconductor CMP Equipment Components Product and Services
 - 9.4.4 3M Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 3M Recent Developments/Updates
 - 9.4.6 3M Competitive Strengths & Weaknesses
- 9.5 Saesol Diamond
 - 9.5.1 Saesol Diamond Details
 - 9.5.2 Saesol Diamond Major Business
 - 9.5.3 Saesol Diamond Semiconductor CMP Equipment Components Product and Services
 - 9.5.4 Saesol Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Saesol Diamond Recent Developments/Updates
 - 9.5.6 Saesol Diamond Competitive Strengths & Weaknesses
- 9.6 KINIK Company
 - 9.6.1 KINIK Company Details
 - 9.6.2 KINIK Company Major Business
 - 9.6.3 KINIK Company Semiconductor CMP Equipment Components Product and Services
 - 9.6.4 KINIK Company Semiconductor CMP Equipment Components Revenue, Gross

Margin and Market Share (2021-2026)

9.6.5 KINIK Company Recent Developments/Updates

9.6.6 KINIK Company Competitive Strengths & Weaknesses

9.7 Entrepix

9.7.1 Entrepix Details

9.7.2 Entrepix Major Business

9.7.3 Entrepix Semiconductor CMP Equipment Components Product and Services

9.7.4 Entrepix Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Entrepix Recent Developments/Updates

9.7.6 Entrepix Competitive Strengths & Weaknesses

9.8 EHWA Diamond

9.8.1 EHWA Diamond Details

9.8.2 EHWA Diamond Major Business

9.8.3 EHWA Diamond Semiconductor CMP Equipment Components Product and Services

9.8.4 EHWA Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 EHWA Diamond Recent Developments/Updates

9.8.6 EHWA Diamond Competitive Strengths & Weaknesses

9.9 ACCRETECH

9.9.1 ACCRETECH Details

9.9.2 ACCRETECH Major Business

9.9.3 ACCRETECH Semiconductor CMP Equipment Components Product and Services

9.9.4 ACCRETECH Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 ACCRETECH Recent Developments/Updates

9.9.6 ACCRETECH Competitive Strengths & Weaknesses

9.10 Shinhan Diamond

9.10.1 Shinhan Diamond Details

9.10.2 Shinhan Diamond Major Business

9.10.3 Shinhan Diamond Semiconductor CMP Equipment Components Product and Services

9.10.4 Shinhan Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Shinhan Diamond Recent Developments/Updates

9.10.6 Shinhan Diamond Competitive Strengths & Weaknesses

9.11 Diamonex / BEST

- 9.11.1 Diamonex / BEST Details
- 9.11.2 Diamonex / BEST Major Business
- 9.11.3 Diamonex / BEST Semiconductor CMP Equipment Components Product and Services
- 9.11.4 Diamonex / BEST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
- 9.11.5 Diamonex / BEST Recent Developments/Updates
- 9.11.6 Diamonex / BEST Competitive Strengths & Weaknesses
- 9.12 DuraTek
 - 9.12.1 DuraTek Details
 - 9.12.2 DuraTek Major Business
 - 9.12.3 DuraTek Semiconductor CMP Equipment Components Product and Services
 - 9.12.4 DuraTek Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 DuraTek Recent Developments/Updates
 - 9.12.6 DuraTek Competitive Strengths & Weaknesses
- 9.13 AION
 - 9.13.1 AION Details
 - 9.13.2 AION Major Business
 - 9.13.3 AION Semiconductor CMP Equipment Components Product and Services
 - 9.13.4 AION Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 AION Recent Developments/Updates
 - 9.13.6 AION Competitive Strengths & Weaknesses
- 9.14 ARC Precision
 - 9.14.1 ARC Precision Details
 - 9.14.2 ARC Precision Major Business
 - 9.14.3 ARC Precision Semiconductor CMP Equipment Components Product and Services
 - 9.14.4 ARC Precision Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.14.5 ARC Precision Recent Developments/Updates
 - 9.14.6 ARC Precision Competitive Strengths & Weaknesses
- 9.15 Calitech
 - 9.15.1 Calitech Details
 - 9.15.2 Calitech Major Business
 - 9.15.3 Calitech Semiconductor CMP Equipment Components Product and Services
 - 9.15.4 Calitech Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

- 9.15.5 Calitech Recent Developments/Updates
- 9.15.6 Calitech Competitive Strengths & Weaknesses
- 9.16 IST
 - 9.16.1 IST Details
 - 9.16.2 IST Major Business
 - 9.16.3 IST Semiconductor CMP Equipment Components Product and Services
 - 9.16.4 IST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.16.5 IST Recent Developments/Updates
 - 9.16.6 IST Competitive Strengths & Weaknesses
- 9.17 Puri-Science
 - 9.17.1 Puri-Science Details
 - 9.17.2 Puri-Science Major Business
 - 9.17.3 Puri-Science Semiconductor CMP Equipment Components Product and Services
 - 9.17.4 Puri-Science Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Puri-Science Recent Developments/Updates
 - 9.17.6 Puri-Science Competitive Strengths & Weaknesses
- 9.18 Nanjing Sanchao
 - 9.18.1 Nanjing Sanchao Details
 - 9.18.2 Nanjing Sanchao Major Business
 - 9.18.3 Nanjing Sanchao Semiconductor CMP Equipment Components Product and Services
 - 9.18.4 Nanjing Sanchao Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Nanjing Sanchao Recent Developments/Updates
 - 9.18.6 Nanjing Sanchao Competitive Strengths & Weaknesses
- 9.19 Fluorocarbon Group
 - 9.19.1 Fluorocarbon Group Details
 - 9.19.2 Fluorocarbon Group Major Business
 - 9.19.3 Fluorocarbon Group Semiconductor CMP Equipment Components Product and Services
 - 9.19.4 Fluorocarbon Group Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Fluorocarbon Group Recent Developments/Updates
 - 9.19.6 Fluorocarbon Group Competitive Strengths & Weaknesses
- 9.20 Junhua PEEK
 - 9.20.1 Junhua PEEK Details

- 9.20.2 Junhua PEEK Major Business
- 9.20.3 Junhua PEEK Semiconductor CMP Equipment Components Product and Services
- 9.20.4 Junhua PEEK Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
- 9.20.5 Junhua PEEK Recent Developments/Updates
- 9.20.6 Junhua PEEK Competitive Strengths & Weaknesses
- 9.21 Showa Industries
 - 9.21.1 Showa Industries Details
 - 9.21.2 Showa Industries Major Business
 - 9.21.3 Showa Industries Semiconductor CMP Equipment Components Product and Services
 - 9.21.4 Showa Industries Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.21.5 Showa Industries Recent Developments/Updates
 - 9.21.6 Showa Industries Competitive Strengths & Weaknesses
- 9.22 Atlas Fibre
 - 9.22.1 Atlas Fibre Details
 - 9.22.2 Atlas Fibre Major Business
 - 9.22.3 Atlas Fibre Semiconductor CMP Equipment Components Product and Services
 - 9.22.4 Atlas Fibre Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.22.5 Atlas Fibre Recent Developments/Updates
 - 9.22.6 Atlas Fibre Competitive Strengths & Weaknesses
- 9.23 MOS
 - 9.23.1 MOS Details
 - 9.23.2 MOS Major Business
 - 9.23.3 MOS Semiconductor CMP Equipment Components Product and Services
 - 9.23.4 MOS Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.23.5 MOS Recent Developments/Updates
 - 9.23.6 MOS Competitive Strengths & Weaknesses
- 9.24 Materials Nano Engineering (MNE)
 - 9.24.1 Materials Nano Engineering (MNE) Details
 - 9.24.2 Materials Nano Engineering (MNE) Major Business
 - 9.24.3 Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Product and Services
 - 9.24.4 Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

- 9.24.5 Materials Nano Engineering (MNE) Recent Developments/Updates
- 9.24.6 Materials Nano Engineering (MNE) Competitive Strengths & Weaknesses
- 9.25 Nippon Steel & Sumikin Materials
 - 9.25.1 Nippon Steel & Sumikin Materials Details
 - 9.25.2 Nippon Steel & Sumikin Materials Major Business
 - 9.25.3 Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Product and Services
 - 9.25.4 Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.25.5 Nippon Steel & Sumikin Materials Recent Developments/Updates
 - 9.25.6 Nippon Steel & Sumikin Materials Competitive Strengths & Weaknesses
- 9.26 Willbe S&T
 - 9.26.1 Willbe S&T Details
 - 9.26.2 Willbe S&T Major Business
 - 9.26.3 Willbe S&T Semiconductor CMP Equipment Components Product and Services
 - 9.26.4 Willbe S&T Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.26.5 Willbe S&T Recent Developments/Updates
 - 9.26.6 Willbe S&T Competitive Strengths & Weaknesses
- 9.27 Cnus Co., Ltd.
 - 9.27.1 Cnus Co., Ltd. Details
 - 9.27.2 Cnus Co., Ltd. Major Business
 - 9.27.3 Cnus Co., Ltd. Semiconductor CMP Equipment Components Product and Services
 - 9.27.4 Cnus Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.27.5 Cnus Co., Ltd. Recent Developments/Updates
 - 9.27.6 Cnus Co., Ltd. Competitive Strengths & Weaknesses
- 9.28 UIS Technologies
 - 9.28.1 UIS Technologies Details
 - 9.28.2 UIS Technologies Major Business
 - 9.28.3 UIS Technologies Semiconductor CMP Equipment Components Product and Services
 - 9.28.4 UIS Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.28.5 UIS Technologies Recent Developments/Updates
 - 9.28.6 UIS Technologies Competitive Strengths & Weaknesses
- 9.29 Euroshore
 - 9.29.1 Euroshore Details

- 9.29.2 Euroshore Major Business
- 9.29.3 Euroshore Semiconductor CMP Equipment Components Product and Services
- 9.29.4 Euroshore Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
- 9.29.5 Euroshore Recent Developments/Updates
- 9.29.6 Euroshore Competitive Strengths & Weaknesses
- 9.30 PTC, Inc.
 - 9.30.1 PTC, Inc. Details
 - 9.30.2 PTC, Inc. Major Business
 - 9.30.3 PTC, Inc. Semiconductor CMP Equipment Components Product and Services
 - 9.30.4 PTC, Inc. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.30.5 PTC, Inc. Recent Developments/Updates
 - 9.30.6 PTC, Inc. Competitive Strengths & Weaknesses
- 9.31 AKT Components Sdn Bhd
 - 9.31.1 AKT Components Sdn Bhd Details
 - 9.31.2 AKT Components Sdn Bhd Major Business
 - 9.31.3 AKT Components Sdn Bhd Semiconductor CMP Equipment Components Product and Services
 - 9.31.4 AKT Components Sdn Bhd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.31.5 AKT Components Sdn Bhd Recent Developments/Updates
 - 9.31.6 AKT Components Sdn Bhd Competitive Strengths & Weaknesses
- 9.32 Ensinger
 - 9.32.1 Ensinger Details
 - 9.32.2 Ensinger Major Business
 - 9.32.3 Ensinger Semiconductor CMP Equipment Components Product and Services
 - 9.32.4 Ensinger Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.32.5 Ensinger Recent Developments/Updates
 - 9.32.6 Ensinger Competitive Strengths & Weaknesses
- 9.33 Pall
 - 9.33.1 Pall Details
 - 9.33.2 Pall Major Business
 - 9.33.3 Pall Semiconductor CMP Equipment Components Product and Services
 - 9.33.4 Pall Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 9.33.5 Pall Recent Developments/Updates
 - 9.33.6 Pall Competitive Strengths & Weaknesses

9.34 Cobetter

9.34.1 Cobetter Details

9.34.2 Cobetter Major Business

9.34.3 Cobetter Semiconductor CMP Equipment Components Product and Services

9.34.4 Cobetter Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.34.5 Cobetter Recent Developments/Updates

9.34.6 Cobetter Competitive Strengths & Weaknesses

9.35 Warde Tec

9.35.1 Warde Tec Details

9.35.2 Warde Tec Major Business

9.35.3 Warde Tec Semiconductor CMP Equipment Components Product and Services

9.35.4 Warde Tec Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.35.5 Warde Tec Recent Developments/Updates

9.35.6 Warde Tec Competitive Strengths & Weaknesses

9.36 IV Technologies Co.,Ltd

9.36.1 IV Technologies Co.,Ltd Details

9.36.2 IV Technologies Co.,Ltd Major Business

9.36.3 IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Product and Services

9.36.4 IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.36.5 IV Technologies Co.,Ltd Recent Developments/Updates

9.36.6 IV Technologies Co.,Ltd Competitive Strengths & Weaknesses

9.37 Pasco Precision Corp

9.37.1 Pasco Precision Corp Details

9.37.2 Pasco Precision Corp Major Business

9.37.3 Pasco Precision Corp Semiconductor CMP Equipment Components Product and Services

9.37.4 Pasco Precision Corp Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.37.5 Pasco Precision Corp Recent Developments/Updates

9.37.6 Pasco Precision Corp Competitive Strengths & Weaknesses

9.38 Konfoong Materials International (KFMI)

9.38.1 Konfoong Materials International (KFMI) Details

9.38.2 Konfoong Materials International (KFMI) Major Business

9.38.3 Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Product and Services

9.38.4 Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.38.5 Konfoong Materials International (KFMI) Recent Developments/Updates

9.38.6 Konfoong Materials International (KFMI) Competitive Strengths & Weaknesses

9.39 Jetway Technologies

9.39.1 Jetway Technologies Details

9.39.2 Jetway Technologies Major Business

9.39.3 Jetway Technologies Semiconductor CMP Equipment Components Product and Services

9.39.4 Jetway Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.39.5 Jetway Technologies Recent Developments/Updates

9.39.6 Jetway Technologies Competitive Strengths & Weaknesses

9.40 Chia Ping Diamond Industrial Co., Ltd.

9.40.1 Chia Ping Diamond Industrial Co., Ltd. Details

9.40.2 Chia Ping Diamond Industrial Co., Ltd. Major Business

9.40.3 Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Product and Services

9.40.4 Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

9.40.5 Chia Ping Diamond Industrial Co., Ltd. Recent Developments/Updates

9.40.6 Chia Ping Diamond Industrial Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Semiconductor CMP Equipment Components Industry Chain

10.2 Semiconductor CMP Equipment Components Upstream Analysis

10.3 Semiconductor CMP Equipment Components Midstream Analysis

10.4 Semiconductor CMP Equipment Components Downstream Analysis

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 CMP Equipment Components Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Semiconductor CMP Equipment Components Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Semiconductor CMP Equipment Components Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Semiconductor CMP Equipment Components Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Semiconductor CMP Equipment Components Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Semiconductor CMP Equipment Components Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Semiconductor CMP Equipment Components Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Semiconductor CMP Equipment Components Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Semiconductor CMP Equipment Components Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Semiconductor CMP Equipment Components Players in 2025

Table 12. World Semiconductor CMP Equipment Components Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Semiconductor CMP Equipment Components Company Evaluation Quadrant

Table 14. Head Office of Key Semiconductor CMP Equipment Components Players

Table 15. Semiconductor CMP Equipment Components Market: Company Product Type Footprint

Table 16. Semiconductor CMP Equipment Components Market: Company Product Application Footprint

Table 17. Semiconductor CMP Equipment Components Mergers & Acquisitions Activity

Table 18. United States VS China Semiconductor CMP Equipment Components Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Semiconductor CMP Equipment Components Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Semiconductor CMP Equipment Components Companies, Headquarters (States, Country)

Table 21. United States Based Companies Semiconductor CMP Equipment Components Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Semiconductor CMP Equipment Components Revenue Market Share (2021-2026)

Table 23. China Based Semiconductor CMP Equipment Components Companies, Headquarters (Province, Country)

Table 24. China Based Companies Semiconductor CMP Equipment Components Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Semiconductor CMP Equipment Components Revenue Market Share (2021-2026)

Table 26. Rest of World Based Semiconductor CMP Equipment Components Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Semiconductor CMP Equipment Components Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Semiconductor CMP Equipment Components Revenue Market Share (2021-2026)

Table 29. World Semiconductor CMP Equipment Components Market Size By Product Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Semiconductor CMP Equipment Components Market Size Value By Product Type (2021-2026) & (USD Million)

Table 31. World Semiconductor CMP Equipment Components Market Size By Product Type (2027-2032) & (USD Million)

Table 32. World Semiconductor CMP Equipment Components Market Size By Supply Model, (USD Million), 2021 & 2025 & 2032

Table 33. World Semiconductor CMP Equipment Components Market Size Value By Supply Model (2021-2026) & (USD Million)

Table 34. World Semiconductor CMP Equipment Components Market Size By Supply Model (2027-2032) & (USD Million)

Table 35. World Semiconductor CMP Equipment Components Market Size By Device Application, (USD Million), 2021 & 2025 & 2032

Table 36. World Semiconductor CMP Equipment Components Market Size Value By Device Application (2021-2026) & (USD Million)

Table 37. World Semiconductor CMP Equipment Components Market Size By Device Application (2027-2032) & (USD Million)

Table 38. World Semiconductor CMP Equipment Components Market Size By Wafer Size, (USD Million), 2021 & 2025 & 2032

Table 39. World Semiconductor CMP Equipment Components Market Size By Wafer

Size (2021-2026) & (USD Million)

Table 40. World Semiconductor CMP Equipment Components Market Size By Wafer Size (2027-2032) & (USD Million)

Table 41. Applied Materials Basic Information, Manufacturing Base and Competitors

Table 42. Applied Materials Major Business

Table 43. Applied Materials Semiconductor CMP Equipment Components Product and Services

Table 44. Applied Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Applied Materials Recent Developments/Updates

Table 46. Applied Materials Competitive Strengths & Weaknesses

Table 47. EBARA Corporation Basic Information, Manufacturing Base and Competitors

Table 48. EBARA Corporation Major Business

Table 49. EBARA Corporation Semiconductor CMP Equipment Components Product and Services

Table 50. EBARA Corporation Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. EBARA Corporation Recent Developments/Updates

Table 52. EBARA Corporation Competitive Strengths & Weaknesses

Table 53. Entegris Basic Information, Manufacturing Base and Competitors

Table 54. Entegris Major Business

Table 55. Entegris Semiconductor CMP Equipment Components Product and Services

Table 56. Entegris Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Entegris Recent Developments/Updates

Table 58. Entegris Competitive Strengths & Weaknesses

Table 59. 3M Basic Information, Manufacturing Base and Competitors

Table 60. 3M Major Business

Table 61. 3M Semiconductor CMP Equipment Components Product and Services

Table 62. 3M Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. 3M Recent Developments/Updates

Table 64. 3M Competitive Strengths & Weaknesses

Table 65. Saesol Diamond Basic Information, Manufacturing Base and Competitors

Table 66. Saesol Diamond Major Business

Table 67. Saesol Diamond Semiconductor CMP Equipment Components Product and Services

Table 68. Saesol Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Saesol Diamond Recent Developments/Updates
Table 70. Saesol Diamond Competitive Strengths & Weaknesses
Table 71. KINIK Company Basic Information, Manufacturing Base and Competitors
Table 72. KINIK Company Major Business
Table 73. KINIK Company Semiconductor CMP Equipment Components Product and Services
Table 74. KINIK Company Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. KINIK Company Recent Developments/Updates
Table 76. KINIK Company Competitive Strengths & Weaknesses
Table 77. Entrepix Basic Information, Manufacturing Base and Competitors
Table 78. Entrepix Major Business
Table 79. Entrepix Semiconductor CMP Equipment Components Product and Services
Table 80. Entrepix Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Entrepix Recent Developments/Updates
Table 82. Entrepix Competitive Strengths & Weaknesses
Table 83. EHWA Diamond Basic Information, Manufacturing Base and Competitors
Table 84. EHWA Diamond Major Business
Table 85. EHWA Diamond Semiconductor CMP Equipment Components Product and Services
Table 86. EHWA Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. EHWA Diamond Recent Developments/Updates
Table 88. EHWA Diamond Competitive Strengths & Weaknesses
Table 89. ACCRETECH Basic Information, Manufacturing Base and Competitors
Table 90. ACCRETECH Major Business
Table 91. ACCRETECH Semiconductor CMP Equipment Components Product and Services
Table 92. ACCRETECH Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. ACCRETECH Recent Developments/Updates
Table 94. ACCRETECH Competitive Strengths & Weaknesses
Table 95. Shinhan Diamond Basic Information, Manufacturing Base and Competitors
Table 96. Shinhan Diamond Major Business
Table 97. Shinhan Diamond Semiconductor CMP Equipment Components Product and Services
Table 98. Shinhan Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Shinhan Diamond Recent Developments/Updates
Table 100. Shinhan Diamond Competitive Strengths & Weaknesses
Table 101. Diamonex / BEST Basic Information, Manufacturing Base and Competitors
Table 102. Diamonex / BEST Major Business
Table 103. Diamonex / BEST Semiconductor CMP Equipment Components Product and Services
Table 104. Diamonex / BEST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Diamonex / BEST Recent Developments/Updates
Table 106. Diamonex / BEST Competitive Strengths & Weaknesses
Table 107. DuraTek Basic Information, Manufacturing Base and Competitors
Table 108. DuraTek Major Business
Table 109. DuraTek Semiconductor CMP Equipment Components Product and Services
Table 110. DuraTek Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. DuraTek Recent Developments/Updates
Table 112. DuraTek Competitive Strengths & Weaknesses
Table 113. AION Basic Information, Manufacturing Base and Competitors
Table 114. AION Major Business
Table 115. AION Semiconductor CMP Equipment Components Product and Services
Table 116. AION Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. AION Recent Developments/Updates
Table 118. AION Competitive Strengths & Weaknesses
Table 119. ARC Precision Basic Information, Manufacturing Base and Competitors
Table 120. ARC Precision Major Business
Table 121. ARC Precision Semiconductor CMP Equipment Components Product and Services
Table 122. ARC Precision Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. ARC Precision Recent Developments/Updates
Table 124. ARC Precision Competitive Strengths & Weaknesses
Table 125. Calitech Basic Information, Manufacturing Base and Competitors
Table 126. Calitech Major Business
Table 127. Calitech Semiconductor CMP Equipment Components Product and Services
Table 128. Calitech Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. Calitech Recent Developments/Updates

Table 130. Calitech Competitive Strengths & Weaknesses
Table 131. IST Basic Information, Manufacturing Base and Competitors
Table 132. IST Major Business
Table 133. IST Semiconductor CMP Equipment Components Product and Services
Table 134. IST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. IST Recent Developments/Updates
Table 136. IST Competitive Strengths & Weaknesses
Table 137. Puri-Science Basic Information, Manufacturing Base and Competitors
Table 138. Puri-Science Major Business
Table 139. Puri-Science Semiconductor CMP Equipment Components Product and Services
Table 140. Puri-Science Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. Puri-Science Recent Developments/Updates
Table 142. Puri-Science Competitive Strengths & Weaknesses
Table 143. Nanjing Sanchao Basic Information, Manufacturing Base and Competitors
Table 144. Nanjing Sanchao Major Business
Table 145. Nanjing Sanchao Semiconductor CMP Equipment Components Product and Services
Table 146. Nanjing Sanchao Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. Nanjing Sanchao Recent Developments/Updates
Table 148. Nanjing Sanchao Competitive Strengths & Weaknesses
Table 149. Fluorocarbon Group Basic Information, Manufacturing Base and Competitors
Table 150. Fluorocarbon Group Major Business
Table 151. Fluorocarbon Group Semiconductor CMP Equipment Components Product and Services
Table 152. Fluorocarbon Group Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. Fluorocarbon Group Recent Developments/Updates
Table 154. Fluorocarbon Group Competitive Strengths & Weaknesses
Table 155. Junhua PEEK Basic Information, Manufacturing Base and Competitors
Table 156. Junhua PEEK Major Business
Table 157. Junhua PEEK Semiconductor CMP Equipment Components Product and Services
Table 158. Junhua PEEK Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 159. Junhua PEEK Recent Developments/Updates

Table 160. Junhua PEEK Competitive Strengths & Weaknesses

Table 161. Showa Industries Basic Information, Manufacturing Base and Competitors

Table 162. Showa Industries Major Business

Table 163. Showa Industries Semiconductor CMP Equipment Components Product and Services

Table 164. Showa Industries Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 165. Showa Industries Recent Developments/Updates

Table 166. Showa Industries Competitive Strengths & Weaknesses

Table 167. Atlas Fibre Basic Information, Manufacturing Base and Competitors

Table 168. Atlas Fibre Major Business

Table 169. Atlas Fibre Semiconductor CMP Equipment Components Product and Services

Table 170. Atlas Fibre Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 171. Atlas Fibre Recent Developments/Updates

Table 172. Atlas Fibre Competitive Strengths & Weaknesses

Table 173. MOS Basic Information, Manufacturing Base and Competitors

Table 174. MOS Major Business

Table 175. MOS Semiconductor CMP Equipment Components Product and Services

Table 176. MOS Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 177. MOS Recent Developments/Updates

Table 178. MOS Competitive Strengths & Weaknesses

Table 179. Materials Nano Engineering (MNE) Basic Information, Manufacturing Base and Competitors

Table 180. Materials Nano Engineering (MNE) Major Business

Table 181. Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Product and Services

Table 182. Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 183. Materials Nano Engineering (MNE) Recent Developments/Updates

Table 184. Materials Nano Engineering (MNE) Competitive Strengths & Weaknesses

Table 185. Nippon Steel & Sumikin Materials Basic Information, Manufacturing Base and Competitors

Table 186. Nippon Steel & Sumikin Materials Major Business

Table 187. Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Product and Services

Table 188. Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 189. Nippon Steel & Sumikin Materials Recent Developments/Updates

Table 190. Nippon Steel & Sumikin Materials Competitive Strengths & Weaknesses

Table 191. Willbe S&T Basic Information, Manufacturing Base and Competitors

Table 192. Willbe S&T Major Business

Table 193. Willbe S&T Semiconductor CMP Equipment Components Product and Services

Table 194. Willbe S&T Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 195. Willbe S&T Recent Developments/Updates

Table 196. Willbe S&T Competitive Strengths & Weaknesses

Table 197. Cnus Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 198. Cnus Co., Ltd. Major Business

Table 199. Cnus Co., Ltd. Semiconductor CMP Equipment Components Product and Services

Table 200. Cnus Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 201. Cnus Co., Ltd. Recent Developments/Updates

Table 202. Cnus Co., Ltd. Competitive Strengths & Weaknesses

Table 203. UIS Technologies Basic Information, Manufacturing Base and Competitors

Table 204. UIS Technologies Major Business

Table 205. UIS Technologies Semiconductor CMP Equipment Components Product and Services

Table 206. UIS Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 207. UIS Technologies Recent Developments/Updates

Table 208. UIS Technologies Competitive Strengths & Weaknesses

Table 209. Euroshore Basic Information, Manufacturing Base and Competitors

Table 210. Euroshore Major Business

Table 211. Euroshore Semiconductor CMP Equipment Components Product and Services

Table 212. Euroshore Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 213. Euroshore Recent Developments/Updates

Table 214. Euroshore Competitive Strengths & Weaknesses

Table 215. PTC, Inc. Basic Information, Manufacturing Base and Competitors

Table 216. PTC, Inc. Major Business

Table 217. PTC, Inc. Semiconductor CMP Equipment Components Product and

Services

Table 218. PTC, Inc. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 219. PTC, Inc. Recent Developments/Updates

Table 220. PTC, Inc. Competitive Strengths & Weaknesses

Table 221. AKT Components Sdn Bhd Basic Information, Manufacturing Base and Competitors

Table 222. AKT Components Sdn Bhd Major Business

Table 223. AKT Components Sdn Bhd Semiconductor CMP Equipment Components Product and Services

Table 224. AKT Components Sdn Bhd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 225. AKT Components Sdn Bhd Recent Developments/Updates

Table 226. AKT Components Sdn Bhd Competitive Strengths & Weaknesses

Table 227. Ensinger Basic Information, Manufacturing Base and Competitors

Table 228. Ensinger Major Business

Table 229. Ensinger Semiconductor CMP Equipment Components Product and Services

Table 230. Ensinger Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 231. Ensinger Recent Developments/Updates

Table 232. Ensinger Competitive Strengths & Weaknesses

Table 233. Pall Basic Information, Manufacturing Base and Competitors

Table 234. Pall Major Business

Table 235. Pall Semiconductor CMP Equipment Components Product and Services

Table 236. Pall Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 237. Pall Recent Developments/Updates

Table 238. Pall Competitive Strengths & Weaknesses

Table 239. Cobetter Basic Information, Manufacturing Base and Competitors

Table 240. Cobetter Major Business

Table 241. Cobetter Semiconductor CMP Equipment Components Product and Services

Table 242. Cobetter Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 243. Cobetter Recent Developments/Updates

Table 244. Cobetter Competitive Strengths & Weaknesses

Table 245. Warde Tec Basic Information, Manufacturing Base and Competitors

Table 246. Warde Tec Major Business

Table 247. Warde Tec Semiconductor CMP Equipment Components Product and Services

Table 248. Warde Tec Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 249. Warde Tec Recent Developments/Updates

Table 250. Warde Tec Competitive Strengths & Weaknesses

Table 251. IV Technologies Co.,Ltd Basic Information, Manufacturing Base and Competitors

Table 252. IV Technologies Co.,Ltd Major Business

Table 253. IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Product and Services

Table 254. IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 255. IV Technologies Co.,Ltd Recent Developments/Updates

Table 256. IV Technologies Co.,Ltd Competitive Strengths & Weaknesses

Table 257. Pasco Precision Corp Basic Information, Manufacturing Base and Competitors

Table 258. Pasco Precision Corp Major Business

Table 259. Pasco Precision Corp Semiconductor CMP Equipment Components Product and Services

Table 260. Pasco Precision Corp Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 261. Pasco Precision Corp Recent Developments/Updates

Table 262. Pasco Precision Corp Competitive Strengths & Weaknesses

Table 263. Konfoong Materials International (KFMI) Basic Information, Manufacturing Base and Competitors

Table 264. Konfoong Materials International (KFMI) Major Business

Table 265. Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Product and Services

Table 266. Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 267. Konfoong Materials International (KFMI) Recent Developments/Updates

Table 268. Konfoong Materials International (KFMI) Competitive Strengths & Weaknesses

Table 269. Jetway Technologies Basic Information, Manufacturing Base and Competitors

Table 270. Jetway Technologies Major Business

Table 271. Jetway Technologies Semiconductor CMP Equipment Components Product and Services

Table 272. Jetway Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 273. Jetway Technologies Recent Developments/Updates

Table 274. Jetway Technologies Competitive Strengths & Weaknesses

Table 275. Chia Ping Diamond Industrial Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 276. Chia Ping Diamond Industrial Co., Ltd. Major Business

Table 277. Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Product and Services

Table 278. Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 279. Chia Ping Diamond Industrial Co., Ltd. Recent Developments/Updates

Table 280. Chia Ping Diamond Industrial Co., Ltd. Competitive Strengths & Weaknesses

Table 281. Global Key Players of Semiconductor CMP Equipment Components Upstream (Raw Materials)

Table 282. Global Semiconductor CMP Equipment Components Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor CMP Equipment Components Picture

Figure 2. World Semiconductor CMP Equipment Components Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Semiconductor CMP Equipment Components Total Revenue (2021-2032) & (USD Million)

Figure 4. World Semiconductor CMP Equipment Components Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Semiconductor CMP Equipment Components Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Semiconductor CMP Equipment Components Revenue (2021-2032) & (USD Million)

Figure 13. Semiconductor CMP Equipment Components Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 16. World Semiconductor CMP Equipment Components Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 18. China Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 23. India Semiconductor CMP Equipment Components Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Semiconductor CMP Equipment Components by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Semiconductor CMP Equipment Components Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Semiconductor CMP Equipment Components Markets in 2025

Figure 27. United States VS China: Semiconductor CMP Equipment Components Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Semiconductor CMP Equipment Components Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Semiconductor CMP Equipment Components Market Size By Product Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Semiconductor CMP Equipment Components Market Size Market Share By Product Type in 2025

Figure 31. CMP Pad Conditioners / Diamond Disks

Figure 32. CMP Retaining Rings / Retainer Rings

Figure 33. CMP Head / Carrier Head Parts

Figure 34. CMP Brushes / Post-CMP PVA Brushes

Figure 35. CMP Tool-Specific Engineered Plastic Parts

Figure 36. Other CMP Tool-Specific Spare Parts

Figure 37. World Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2032)

Figure 38. World Semiconductor CMP Equipment Components Market Size By Supply Model, (USD Million), 2021 & 2025 & 2032

Figure 39. World Semiconductor CMP Equipment Components Market Size Market Share By Supply Model in 2025

Figure 40. OEM Original Spare Parts

Figure 41. Qualified Third-Party Replacement Parts

Figure 42. World Semiconductor CMP Equipment Components Market Size Market Share By Supply Model (2021-2032)

Figure 43. World Semiconductor CMP Equipment Components Market Size By Device

Application, (USD Million), 2021 & 2025 & 2032

Figure 44. World Semiconductor CMP Equipment Components Market Size Market Share By Device Application in 2025

Figure 45. Logic / Foundry CMP Components

Figure 46. DRAM CMP Components

Figure 47. 3D NAND CMP Components

Figure 48. Power / Analog / MEMS CMP Components

Figure 49. Advanced Packaging CMP Components

Figure 50. Other Specialty Device CMP Components

Figure 51. World Semiconductor CMP Equipment Components Market Size Market Share By Device Application (2021-2032)

Figure 52. World Semiconductor CMP Equipment Components Market Size By Wafer Size, (USD Million), 2021 & 2025 & 2032

Figure 53. World Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size in 2025

Figure 54. 300mm CMP Tool Components

Figure 55. 200mm CMP Tool Components

Figure 56. Others

Figure 57. World Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2032)

Figure 58. Semiconductor CMP Equipment Components Industrial Chain

Figure 59. Methodology

Figure 60. Research Process and Data Source

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