

Global Shallow Trench Isolation (STI) Slurries Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Shallow Trench Isolation (STI) Slurries market size was valued at US\$ 426 million in 2025 and is forecast to a readjusted size of US\$ 633 million by 2032 with a CAGR of 6.3% during review period.

Shallow Trench Isolation (STI) CMP slurry is the consumable used to planarize the oxide trench-fill stack after STI gap-fill, where the process relies on the combined action of abrasive particles (mechanical removal) and slurry chemistry (etching/dissolution/passivation) under pad pressure and relative motion. In practice, STI CMP slurries are engineered to deliver strong planarization while maintaining a robust "stop-on-film" behavior (commonly stopping on SiN hard mask/stop layer) to minimize nitride loss, trench dishing, and erosion. From a product perspective, two mainstream families dominate: (1) ceria (CeO₂) abrasive, high-selectivity oxide slurries formulated with chemical additives to achieve stop-on-film capability and improved topography control; and (2) high-purity silica (colloidal/fumed SiO₂) oxide slurries emphasizing purity, dispersion stability, and low-scratch performance, often shared across STI/ILD dielectric CMP platforms. Process-wise, fabs commonly deploy a multi-step flow (P1 bulk oxide removal + P2 selective/stop step, optionally followed by a buff/finish) to balance throughput, endpoint robustness, and defect control.

In terms of applications, STI CMP slurry is a core FEOL dielectric consumable spanning logic, memory (DRAM/NAND/3D NAND peripheral CMOS), and sensor/MEMS-related manufacturing, with the primary use cases concentrated in STI and closely related ILD oxide planarization steps. Public product disclosures from leading suppliers explicitly position their offerings around "STI/ILD" and "P1/P2" use: Merck describes its

Advanced Oxide CMP slurries as a highly selective oxide slurry family with stop-on-film capability, designed with ceria abrasives and additive formulation technology, emphasizing HVM quality consistency and a strong global supply position for ILD and STI across both P1 and P2 steps. AGC similarly highlights ?Ceria slurry for STI/ILD applications (CES-300/330F series)? and stresses step flattening, material selectivity, uniformity, and lower defect frequency, while also supporting both one-liquid and two-liquid supply modes. On the silica side, Fujimi?s PLANERLITE-4000 series is publicly described as a polishing slurry for SiO₂ films (ILD, STI), built around ultra-high purity colloidal/fumed silica with multiple grades, reflecting the long-standing platform role of silica-based dielectric slurries. Meanwhile, Resonac publicly markets nano-ceria ?ultra-low defect? slurries that selectively remove SiO₂ over stopper films and are positioned as useful for STI, underscoring the mainstream role of high-selectivity ceria for STI stop requirements.

Looking forward, STI CMP slurry innovation is trending toward higher selectivity, lower defectivity, wider process windows, and lower cost of ownership (COO). This includes tighter control of particle size distributions and large-particle counts, and additive/abrasive surface chemistry engineering to reduce scratches and particle-related defects while improving dishing/topography performance; CMP user-group materials explicitly link ceria particle size to defect count and illustrate auto-stop and high SiN selectivity concepts. In addition, as technology nodes advanced (e.g., 45 nm/32 nm and beyond) and high-aspect-ratio gap-fill oxides (e.g., HARP-related) became more critical, published technical discussions note that silica slurries can be less effective on certain oxides and that process-of-record flows increasingly leverage high-selectivity ceria, with ongoing exploration of one-component slurries (covering multiple steps) and/or competition with fixed abrasive pad approaches to rebalance defectivity, dishing, and COO. Finally, delivery/operations trends?such as point-of-use (POU) tunable dilution and one-liquid/two-liquid supply options?are being emphasized to improve on-fab controllability and logistics cost efficiency. The primary growth drivers remain continued scaling and tighter isolation topography/stop requirements, shrinking defect tolerance and yield pressure, and the persistent demand for stable HVM supply and overall COO optimization in leading-edge and high-volume fabs.

This report is a detailed and comprehensive analysis for global Shallow Trench Isolation (STI) Slurries market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Abrasive Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with

market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Shallow Trench Isolation (STI) Slurries market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Shallow Trench Isolation (STI) Slurries market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Shallow Trench Isolation (STI) Slurries market size and forecasts, by Abrasive Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Shallow Trench Isolation (STI) Slurries market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Shallow Trench Isolation (STI) Slurries

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Shallow Trench Isolation (STI) Slurries market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Resonac, Merck KGaA, AGC, Fujimi Corporation, FujiFilm, KC Tech, Soulbrain, Anjimirco Shanghai, Dongjin Semichem, Samsung SDI, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

Shallow Trench Isolation (STI) Slurries market is split by Abrasive Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Abrasive Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Abrasive Type

CeO₂ (Ceria) Slurry

Colloidal Silica Slurry

Market segment by Process Node

High End / Advanced 110nm

Market segment by Application

Logic IC

Memory Chips

Others

Major players covered

Resonac

Merck KGaA

AGC

Fujimi Corporation

FujiFilm

KC Tech

Soulbrain

Anjimirco Shanghai

Dongjin Semichem

Samsung SDI

Saint-Gobain

Vibrantz (Ferro)

ACE NANOCHEM

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Shallow Trench Isolation (STI) Slurries product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Shallow Trench Isolation (STI) Slurries, with price, sales quantity, revenue, and global market share of Shallow Trench Isolation (STI) Slurries from 2021 to 2026.

Chapter 3, the Shallow Trench Isolation (STI) Slurries competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Shallow Trench Isolation (STI) Slurries breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Abrasive Type and by Application, with sales market share and growth rate by Abrasive Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Shallow Trench Isolation (STI) Slurries market forecast, by regions, by Abrasive Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Shallow Trench Isolation (STI) Slurries.

Chapter 14 and 15, to describe Shallow Trench Isolation (STI) Slurries sales channel, distributors, customers, research findings and conclusion.

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