

Global SiC CMP Pads Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global SiC CMP Pads market size is expected to reach \$ 255 million by 2032, rising at a market growth of 15.4% CAGR during the forecast period (2026-2032).

Chemical mechanical polishing/planarization (CMP) is a process that removes materials by a combination of chemical and mechanical (or abrasive) actions to achieve highly smooth and planar material surfaces. Chemical-mechanical polishing (CMP) is often associated with chemical-mechanical planarization which is a polishing process assisted by chemical reactions to remove surface materials. CMP is a standard manufacturing process practiced at the semiconductor industry to fabricate integrated circuits and memory disks. When the purpose is to remove surface materials, it is referred to as chemical-mechanical polishing. However, when the purpose is to flatten a surface, it is referred to as chemical-mechanical planarization. CMP is considered to be a tribochemical process because of the synergy between friction and corrosion. CMP Pad (Chemical Mechanical Polishing Pad) is a product which increases semiconductor integration by smoothening the semiconductor wafer surface through physical and chemical polishing processes.

SiC CMP pads are polishing pads used in the Chemical Mechanical Planarization (CMP) process for semiconductor manufacturing, specifically for Silicon Carbide (SiC) wafers. CMP is a process used to smooth and flatten the surface of a semiconductor wafer to ensure that the layers of material deposited during fabrication are evenly distributed. This is especially important for high-performance devices such as power semiconductors, which use SiC due to its superior thermal conductivity and electrical properties.

SiC wafers are harder and more challenging to polish than traditional silicon wafers, so

specialized CMP pads are designed to handle the mechanical and chemical stresses involved. These pads are typically made from materials like polyurethane, which have a good balance of hardness and flexibility, and are optimized to work with specific slurry solutions in the CMP process.

The primary role of SiC CMP pads is to ensure that the wafer surface is planarized, with minimal damage or defects, in order to produce high-quality SiC devices, such as those used in power electronics or high-frequency applications. In 2025, global silicon carbide CMP polishing pad output reached 207,200 pieces, with an average selling price of USD 381 per piece.

The silicon carbide (SiC) chemical mechanical planarization (CMP) pads market is evolving rapidly, driven by the booming demand for SiC power devices in electric vehicles (EVs), renewable energy, and 5G infrastructure. Below are the key industry trends shaping the future of SiC CMP pads.

The current market-oriented enterprises in China have not obtained foreign certifications, so there is no export for the time being. Because downstream companies are mainly concentrated in Japan, Taiwan, South Korea, Europe and United States and other countries. The electronics industry is mainly concentrated in the Asia-Pacific region, but the current political situation is not optimistic, it may be the most serious year for China's political crisis in the past 30 years. Due to the current trade frictions and China's current international political factors, it may be the best time for domestic SiC CMP Pads manufacturers to occupy the market, and the country's policy investment will increase in the coming years. Therefore, Chinese companies will usher in opportunities for localization in the next few years. We predict that in order to occupy the market, Hubei Dinglong may actively lower the price of the product and madly occupy the market.

At present, considering the cost and the influence of the size of silicon wafers on the performance and efficiency of integrated circuits, the increase in the size of wafers is an inevitable trend and a mainstream trend, in particular, 8-inch and 12-inch. Wafer may develop in the direction of 18 inches in the future. However, the larger the size, the more difficult it is to produce the corresponding CMP pad. When the downstream size becomes an inevitable trend, in order to occupy the market, it is necessary to be able to develop large-size pad, otherwise it will be eliminated by the market. With the expectation of the superior performance improvement of integrated circuits, the polishing performance of CMP pads has to be increased, so its performance in the future must be more stringent.

The global key companies of SiC CMP Pads include DuPont, Fujibo Group, Entegris, IVT Technologies, and etc. In 2025, the global three largest players hold a share over 90% in terms of revenue. New investment requires large capital, and it is difficult for small-scale enterprises to enter the industry. SiC CMP Pads have higher requirements on technology level and processing technology. At present, the market is occupied by American companies. The market is not only influenced by the price, but also influenced by the product performance. The leading companies own the advantages on better performance, more abundant product?s types, better technical and impeccable after-sales service. Consequently, they take the majority of the market share of high-end market. Looking to the future years, prices gap between different brands will go narrowing. Similarly, there will be fluctuation in gross margin.

For manufacturers that have already entered, they need to constantly raise the technical threshold to prevent more companies from entering; by reducing costs and reducing prices, they will quickly occupy the market, develop incremental customer markets, and establish market share advantages; create a brand image and lay an advantage for entering the consumer goods market. Only in this way can we have a larger market share of capital in the fierce competition.

This report studies the global SiC CMP Pads production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global SiC CMP Pads total production and demand, 2021-2032, (K Pcs)

Global SiC CMP Pads total production value, 2021-2032, (USD Million)

Global SiC CMP Pads production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global SiC CMP Pads consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: SiC CMP Pads domestic production, consumption, key domestic manufacturers and share

Global SiC CMP Pads production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global SiC CMP Pads production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global SiC CMP Pads production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global SiC CMP Pads 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 Qnity, Fujibo Group, Entegris, IVT Technologies, Hubei Dinglong, Wuxi Jizhi Electronic Technology, 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 SiC CMP Pads market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) 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 SiC CMP Pads Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global SiC CMP Pads Market, Segmentation by Type:

Hard Pads

Soft Pads

Global SiC CMP Pads Market, Segmentation by End Users:

Foundry

IDM

Global SiC CMP Pads Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global SiC CMP Pads Market, Segmentation by Application:

4 Inch SiC Wafer

6 Inch SiC Wafer

8 Inch SiC Wafer

Companies Profiled:

Qnity

Fujibo Group

Entegris

IVT Technologies

Hubei Dinglong

Wuxi Jizhi Electronic Technology

Key Questions Answered:

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

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