

Global Semiconductor CMP Retaining Rings Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor CMP Retaining Rings market size is expected to reach \$ 249 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

In 2024, global Semiconductor CMP Retaining Rings production reached 751.88 k units , with an average global market price of around US\$ 192.7 per unit. The semiconductor CMP retaining ring (also known as the carrier ring, clamp ring, or retainer ring) is a crucial component in CMP equipment. Its primary functions are to ensure that the wafer is securely positioned on the polishing pad during the polishing process, to distribute pressure evenly across the entire surface of the wafer to ensure consistent and high-quality polishing, and to reduce defects caused by uneven pressure at the wafer's edge, thereby enhancing the overall polishing effect.

The Semiconductor CMP Retaining Rings are an essential precision component in the wafer polishing process, used to secure the wafer, ensure uniform polishing, and reduce defects. Upstream raw materials mainly rely on high-performance polymers and engineering plastics, such as PFA and PEEK supplied by Mitsubishi Chemical, Ensinger, and Victrex, which are resistant to high temperatures and chemical corrosion. Midstream manufacturers process these materials into high-precision retainer rings and supply them to wafer fabs such as TSMC, Samsung, and Intel. As semiconductor processes advance to 3nm and beyond, the requirements for polishing uniformity and wafer surface defect control continue to increase, driving retainer rings from standardized products to high-performance, customized designs, with some manufacturers collaborating closely with wafer fabs to develop specialized materials and designs.

Industry trends are mainly focused on material upgrades, precision customization, and extending service life to reduce particle contamination and chemical reaction side effects. CMP retainer ring production relies on high-precision CNC machining and polishing equipment, with the annual output per production line typically ranging from 20,000 to over 100,000 rings, and the industry concentrated among a few manufacturers with advanced precision capabilities. Gross margins typically range from 28% to 40%, with high-end customized products reaching 40% to 50%. Costs are primarily composed of 70% raw materials, 15% labor, and 15% manufacturing overhead. Downstream demand comes mainly from wafer foundries and IDM companies, with retainer ring consumption directly linked to wafer capacity and process nodes; approximately one retainer ring is consumed for every 400 wafers processed. Orders are generally stable but are noticeably affected by fluctuations in wafer production capacity.

This report studies the global Semiconductor CMP Retaining Rings production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Semiconductor CMP Retaining Rings total production and demand, 2021-2032, (K Units)

Global Semiconductor CMP Retaining Rings total production value, 2021-2032, (USD Million)

Global Semiconductor CMP Retaining Rings production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Semiconductor CMP Retaining Rings consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Semiconductor CMP Retaining Rings domestic production,

consumption, key domestic manufacturers and share

Global Semiconductor CMP Retaining Rings production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Semiconductor CMP Retaining Rings production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Semiconductor CMP Retaining Rings production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Semiconductor CMP Retaining Rings 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 Willbe S&T, Cnus, CALITECH, Duratek, EPK, UIS Technologies, IST, Semplastics, AKT Components, PTC, 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 Retaining Rings market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor CMP Retaining Rings Market, Segmentation by Type:

Polyetheretherketone (PEEK)

Polyphenylene Sulfide (PPS)

Polyethylene Terephthalate (PET)

Others

Global Semiconductor CMP Retaining Rings Market, Segmentation by End Users:

Wafer Manufacturers

Semiconductor Equipment Manufacturers

Global Semiconductor CMP Retaining Rings Market, Segmentation by Channel:

OEM

Aftermarket

Global Semiconductor CMP Retaining Rings Market, Segmentation by Application:

300mm Wafer

200mm Wafer

Others

Companies Profiled:

Willbe S&T

Cnus

CALITECH

Duratek

EPK

UIS Technologies

IST

Semplastics

AKT Components

PTC

Ensinger

Key Questions Answered:

1. How big is the global Semiconductor CMP Retaining Rings market?
2. What is the demand of the global Semiconductor CMP Retaining Rings market?
3. What is the year over year growth of the global Semiconductor CMP Retaining Rings market?
4. What is the production and production value of the global Semiconductor CMP Retaining Rings market?
5. Who are the key producers in the global Semiconductor CMP Retaining Rings

market?

6. What are the growth factors driving the market demand?

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