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Global CMP Slurry for STI & ILD Market Growth 2025-2031

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Abstracts

The global CMP Slurry for STI & ILD market size is predicted to grow from US$ 437 million in 2025 to US$ 688 million in 2031; it is expected to grow at a CAGR of 7.8% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

Chemical mechanical polishing/planarization (CMP) is a process widely used in the microelectronic industries to smooth surfaces with the combination of chemical and mechanical forces. This process uses an abrasive and corrosive slurry to help planarize the surface of a wafer. The particle size distribution of the slurry is a critical parameter controlling the success of the planarization process. Cerium oxide (ceria) based slurries are becoming more widely used in a variety of CMP applications for integrated circuit (IC) manufacturing.

This report studies the CMP Slurry for STI & ILD. Key CMP Slurry is Ceria CMP Slurry , typical products are Resonac’s HS series ceria slurry, and AGC’s CES-300 series, CES-330 series, CES-333F slurries, etc.

The global key companies of CMP Slurry for STI & ILD include Resonac, Merck KGaA, AGC, KC Tech, Soulbrain and Anjimirco Shanghai, etc. In 2024, the global four largest players hold a share approximately 84 % in terms of revenue.

The Chinese market is very active, with new companies entering the industry continuously in recent years. Currently the Potential Entrants of Ceria CMP Slurry

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include Hubei Dinglong, Konfoong Materials International, Zhuhai Cornerstone Technologies and CHUANYAN, etc. In next six years, Chinese players will play more important roles in Ceria CMP Slurry market.

In terms of product segment, Colloidal Ceria Slurry holds 77.17%, while Calcined Ceria Slurry holds 22.83% in 2024. In next six years, Colloidal Ceria Slurry will grow faster in the next few years.

In terms of application, currently CMP Ceria Slurries are mainly used in STI and ILD process, with a share over 95%.

According to Semiconductor Industry Association (SIA), global semiconductor chip sales hit $627.6 billion in 2024, an increase of 19.1% compared to the 2023 total of $526.8 billion. The global semiconductor market experienced its highest-ever sales year in 2024, topping $600 billion in annual sales for the first time, and double-digit market growth is projected for 2025. Semiconductors enable virtually all modern technologies – including medical devices, communications, defense applications, AI, advanced transportation, and countless others – and the long-term industry outlook is incredibly strong. Regionally, yearly sales were up in the Americas (44.8%), China (18.3%), and Asia Pacific/All Others (12.5%), but down in Japan (-0.4%), and Europe (-8.1%).

Several semiconductor product segments stood out in 2024. Sales of logic products totaled $212.6 billion in 2024, making it the largest product category by sales. Memory products were second in terms of sales, increasing by 78.9% in 2024 to a total of $165.1 billion. DRAM products, a subset of memory, recorded an 82.6% sales increase, the largest percentage growth of any product category in 2024.

LP Information, Inc. (LPI) ' newest research report, the “CMP Slurry for STI & ILD Industry Forecast” looks at past sales and reviews total world CMP Slurry for STI & ILD sales in 2024, providing a comprehensive analysis by region and market sector of projected CMP Slurry for STI & ILD sales for 2025 through 2031. With CMP Slurry for STI & ILD sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world CMP Slurry for STI & ILD industry.

This Insight Report provides a comprehensive analysis of the global CMP Slurry for STI & ILD landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on CMP Slurry for

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STI & ILD portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global CMP Slurry for STI & ILD market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for CMP Slurry for STI & ILD and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global CMP Slurry for STI & ILD.

This report presents a comprehensive overview, market shares, and growth opportunities of CMP Slurry for STI & ILD market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Colloical Silica Slurry

CeO2 (Ceria) Slurry

Segmentation by Application:

Slurry for STI Applications

Slurry for ILD Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report
What is the 10-year outlook for the global CMP Slurry for STI & ILD market?

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What factors are driving CMP Slurry for STI & ILD market growth, globally and by region?
Which technologies are poised for the fastest growth by market and region?
How do CMP Slurry for STI & ILD market opportunities vary by end market size?
How does CMP Slurry for STI & ILD break out by Type, by Application?

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