

# Global Post CMP Residue Removal Market Growth 2026-2032

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## Abstracts

The global Post CMP Residue Removal market size is predicted to grow from US\$ 222 million in 2025 to US\$ 359 million in 2032; it is expected to grow at a CAGR of 7.0% from 2026 to 2032.

Post-CMP residue removers are specialty wet-process chemicals used after Chemical Mechanical Planarization (CMP) to remove slurry particles, metal/metal-oxide debris, polishing by-products, organic additives, and surface contaminants from wafer surfaces through controlled dissolution, complexation/chelation, dispersion, and lift-off, typically in combination with brush cleaning, ultrasonic/megasonic agitation, and DI-water rinsing. Formulations commonly integrate acidic or alkaline chemistries, oxidizing/reducing agents, chelators, surfactants, and corrosion inhibitors, and are designed to deliver high residue removal efficiency while minimizing corrosion/etch of metals (e.g., Cu, W, Co), dielectrics (SiO<sub>2</sub> and low-k), barrier layers (Ta/TaN), and the substrate, ensuring low defectivity, low re-deposition, and robust downstream film adhesion and device reliability. In 2025, global production of post-CMP residue removal chemicals reached 20,265 tons, with an average selling price of USD 11.22 per kg.

Post-CMP residue removal chemicals are a critical segment within wafer fab wet-clean process chemistries. They are used after Chemical Mechanical Planarization to remove slurry particles, metal/metal-oxide debris, polishing by-products, and organic additives through controlled dissolution, complexation/chelation, dispersion, and lift-off, typically co-optimized with brush cleaning, megasonic agitation, and DI-water rinsing. As interconnect stacks evolve and more fragile low-k dielectrics and ultra-thin barrier layers are adopted, formulators must balance removal efficiency, material selectivity, and corrosion suppression within a narrower process window. This drives the market shift from general-purpose cleaners to material-stack- and node-specific formulations,

supporting steady expansion and product mix upgrading.

In terms of scale and growth, demand is closely tied to wafer output, CMP step counts, and post-CMP clean configurations. Incremental growth is primarily driven by increasing CMP and cleaning intensity in advanced logic and high-layer memory, alongside tighter defectivity targets. Regionally, demand clusters around East Asian wafer manufacturing hubs, while North America and Europe remain important for advanced process/material development; supply is shared between multinational specialty chemical leaders and high-purity regional suppliers, with the highest-end products shaped by long qualification cycles and deep customer engagement.

From a product structure perspective, residue removers are commonly categorized by chemistry and mechanism, including acidic/alkaline systems, oxidizing/reducing systems, chelation-driven systems, and blended formulations. Corrosion inhibitors and surfactants are typically integrated to minimize attack on metals (Cu/W/Co), protect low-k dielectrics, and reduce particle re-deposition. By application, products cover post-Cu CMP cleans, W plug/contact CMP residue removal, and slurry- or pad-specific residue regimes. End-use is dominated by front-end wafer fabs (logic/foundry and memory), with limited spillover into planarization-related cleaning steps in advanced packaging, but front-end CMP post-clean remains the core driver.

Cost structure is driven by high-purity solvents/water, functional additives (chelators, inhibitors, surfactants, redox components), ultra-fine filtration, and clean filling/packaging. Manufacturing competitiveness depends on ultra-low metal-ion and particle control, as well as batch-to-batch consistency. Customer qualification, field application engineering, and quality-system maintenance add substantial non-material costs and form practical barriers to entry. On capacity metrics, single-line capacity is typically 1,000 tons per year or higher; scalable lines leverage closed mixing, in-line filtration, and clean filling to improve yield and consistency. In practice, effective supply is often constrained by changeover efficiency and application engineering bandwidth during periods of rapid product iteration and intensive customer ramps.

Along the value chain, upstream includes high-purity base chemicals, functional additives, filtration consumables, and packaging; midstream centers on formulation R&D, ultra-pure manufacturing, QC, and application engineering; downstream consists of wafer fabs and their process/equipment integration partners. Competition is led by multinational specialty chemical incumbents with strong global delivery and qualification depth, while regional high-purity suppliers compete through responsiveness, cost structure, and localized supply-chain resilience. The competitive focus is shifting from

single-point cleaning power to an integrated performance bundle of low defectivity, low corrosion, low re-deposition, and process co-optimization. Profitability is supported by technical barriers and customer stickiness, with gross margin typically around 40%, and upside for leaders through high-end customization and service-augmented delivery.

Key trends include higher selectivity and wider process windows for emerging interconnect materials, improved protection for low-k and ultra-thin films, and more robust removal of organic residues and nano-particles. Co-optimization with cleaning equipment parameters (brush/megasonic/rinse) is increasingly important to reduce systemic defects. Suppliers are strengthening ultra-pure manufacturing, in-line monitoring, and digital traceability, while expanding localized capacity and multi-site redundancy to enhance delivery security. As advanced nodes and advanced packaging progress in parallel, post-CMP residue removal chemicals are expected to maintain steady growth, with value creation concentrated in high-end formulation customization and collaborative process development.

LP Information, Inc. (LPI) ' newest research report, the "Post CMP Residue Removal Industry Forecast" looks at past sales and reviews total world Post CMP Residue Removal sales in 2025, providing a comprehensive analysis by region and market sector of projected Post CMP Residue Removal sales for 2026 through 2032. With Post CMP Residue Removal sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Post CMP Residue Removal industry.

This Insight Report provides a comprehensive analysis of the global Post CMP Residue Removal 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 Post CMP Residue Removal portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Post CMP Residue Removal market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Post CMP Residue Removal 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 Post CMP Residue Removal.

This report presents a comprehensive overview, market shares, and growth opportunities of Post CMP Residue Removal market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Acidic Material

Alkaline Material

#### Segmentation by End Users:

Foundry

IDM

#### Segmentation by Sales Channel:

Direct Sales

Distribution

#### Segmentation by Application:

Metal Impurities

Organic Residue

This report also splits the market by region:

Americas

United States

Canada

Mexico

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

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.

Entegris

Versum Materials (Merck KGaA)

Mitsubishi Chemical

Fujifilm

DuPont

Kanto Chemical

BASF

Solexir

Anjimirco Shanghai

Key Questions Addressed in this Report

What is the 10-year outlook for the global Post CMP Residue Removal market?

What factors are driving Post CMP Residue Removal market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Post CMP Residue Removal market opportunities vary by end market size?

How does Post CMP Residue Removal break out by Type, by Application?

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