

Global Semiconductor CMP Equipment Components Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Semiconductor CMP Equipment Components market size is predicted to grow from US\$ 1037 million in 2025 to US\$ 1737 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 2032.

Semiconductor CMP equipment components/parts refer to specialized components installed in chemical mechanical planarization tools and integrated post-CMP cleaning modules. These components directly affect wafer planarity, removal-rate stability, within-wafer uniformity, defect control, consumable lifetime and equipment uptime. The scope mainly covers process-contact wear parts and engineered replacement parts used in polishing heads, platen and conditioning modules, wafer carrier assemblies, post-CMP cleaning modules and related motion or fixture systems. Typical products include CMP pad conditioners or diamond disks, retaining rings or retainer rings, PVA sponge brushes, carrier-head related parts, conditioning-arm components, polishing-head assemblies and CMP-specific engineered plastic parts. These products require high cleanliness, low particle generation, chemical resistance, dimensional stability, controlled wear behavior, batch-to-batch consistency and tool-platform compatibility, making them an important process-critical component category within the semiconductor equipment supply chain.

Semiconductor CMP equipment components should be viewed as a multi-layer component ecosystem rather than a single product category. CMP pad conditioners or diamond disks support pad surface regeneration and removal-rate stability; retaining rings influence wafer edge control and polishing uniformity; PVA brushes and post-CMP cleaning components are critical for particle and residue removal after planarization. Compared with CMP slurry and polishing pads, this component market is smaller in absolute size, but it has stronger tool-platform dependency, longer qualification cycles,

higher switching cost and tighter process-control requirements. It is therefore a specialized, high-stickiness component market within the broader wafer fabrication equipment supply chain.

From the supply side, the global market is structured around four groups: original CMP equipment OEMs, specialized conditioner and cleaning component suppliers, engineered plastic component manufacturers, and regional third-party replacement-part suppliers. Applied Materials, EBARA and ACCRETECH retain strong positions through original equipment platforms and proprietary spare parts. 3M, Saesol, KINIK, EHWA, Shinhan and Diamonex are more visible in CMP pad conditioners. DuraTek, ARC Precision, Calitech, IST, Fluorocarbon and Atlas Fibre are relevant in retaining rings and engineered plastic CMP wear parts. Entegris, AION and Puri-Science are more visible in PVA brushes and post-CMP cleaning components. This explains why the broad longlist is materially wider than the core formal list: the former captures all relevant supply-chain signals, while the latter requires stronger evidence of actual manufacturing or process-critical supply.

Demand growth is mainly driven by advanced logic and memory process complexity, 300mm fab expansion, higher CMP step counts, tighter defect-control requirements and the increasing importance of post-CMP cleaning. Advanced packaging, TSV, hybrid bonding-related surface preparation and redistribution-layer processes also provide incremental demand for specialized planarization and cleaning components. As process windows become narrower, customers increasingly require better particle control, lower contamination, tighter dimensional repeatability and more stable component lifetime. This shifts supplier competition from simple machining capability to a broader combination of material science, clean manufacturing, tool-interface knowledge and wafer-fab qualification support.

Regionally, the United States, Japan, South Korea and Taiwan remain the core supply bases. Mainland China is moving from product availability toward customer qualification and scale-up. Chinese suppliers have visible product evidence in CMP-DISK, PEEK / PI retaining rings and engineered plastic parts, but they still need to demonstrate stable long-term performance in advanced fabs, platform compatibility and batch consistency. Over the next several years, competition will likely intensify between OEM original parts, qualified third-party replacement parts and localized alternatives. The strongest suppliers will be those that can combine process know-how, tool compatibility, clean manufacturing and reliable supply-chain execution.

LPI (LP Information)' newest research report, the "Semiconductor CMP Equipment

Components Industry Forecast? looks at past sales and reviews total world Semiconductor CMP Equipment Components sales in 2025, providing a comprehensive analysis by region and market sector of projected Semiconductor CMP Equipment Components sales for 2026 through 2032. With Semiconductor CMP Equipment Components sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Semiconductor CMP Equipment Components industry.

This Insight Report provides a comprehensive analysis of the global Semiconductor CMP Equipment Components landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Semiconductor CMP Equipment Components portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Semiconductor CMP Equipment Components market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Semiconductor CMP Equipment Components and breaks down the forecast By Product Type, By Wafer Size, 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 Semiconductor CMP Equipment Components.

This report presents a comprehensive overview, market shares, and growth opportunities of Semiconductor CMP Equipment Components market by product type, application, key players and key regions and countries.

Segmentation By Product Type:

CMP Pad Conditioners / Diamond Disks

CMP Retaining Rings / Retainer Rings

CMP Head / Carrier Head Parts

CMP Brushes / Post-CMP PVA Brushes

CMP Tool-Specific Engineered Plastic Parts

Other CMP Tool-Specific Spare Parts

Segmentation By Supply Model:

OEM Original Spare Parts

Qualified Third-Party Replacement Parts

Segmentation By Device Application:

Logic / Foundry CMP Components

DRAM CMP Components

3D NAND CMP Components

Power / Analog / MEMS CMP Components

Advanced Packaging CMP Components

Other Specialty Device CMP Components

Segmentation By Wafer Size:

300mm CMP Tool Components

200mm CMP Tool Components

Others

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 analyzing the company's coverage, product portfolio, its market penetration.

Applied Materials

EBARA Corporation

Entegris

3M

Saesol Diamond

KINIK Company

Entrepix

EHWA Diamond

ACCRETECH

Shinhan Diamond

Diamonex / BEST

DuraTek

AION

ARC Precision

Calitech

IST

Puri-Science

Nanjing Sanchao

Fluorocarbon Group

Junhua PEEK

Showa Industries

Atlas Fibre

MOS

Materials Nano Engineering (MNE)

Nippon Steel & Sumikin Materials

Willbe S&T

Cnus Co., Ltd.

UIS Technologies

Euroshore

PTC, Inc.

AKT Components Sdn Bhd

Ensinger

Pall

Cobetter

Warde Tec

IV Technologies Co.,Ltd

Pasco Precision Corp

Konfoong Materials International (KFMI)

Jetway Technologies

Chia Ping Diamond Industrial Co., Ltd.

Ferrotec (Anhui) Technology Development Co., Ltd

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Semiconductor CMP Equipment Components Market Size (2021-2032)
- 2.1.2 Semiconductor CMP Equipment Components Market Size CAGR by Region (2021 VS 2025 VS 2032)

2.1.3 World Current & Future Analysis for Semiconductor CMP Equipment Components by Country/Region (2021, 2025 & 2032)

2.2 Semiconductor CMP Equipment Components Segment By Product Type

- 2.2.1 CMP Pad Conditioners / Diamond Disks
- 2.2.2 CMP Retaining Rings / Retainer Rings
- 2.2.3 CMP Head / Carrier Head Parts
- 2.2.4 CMP Brushes / Post-CMP PVA Brushes
- 2.2.5 CMP Tool-Specific Engineered Plastic Parts
- 2.2.6 Other CMP Tool-Specific Spare Parts
- 2.2.7 Semiconductor CMP Equipment Components Market Size By Product Type
 - 2.2.7.1 Semiconductor CMP Equipment Components Market Size CAGR By Product Type (2021 VS 2025 VS 2032)

2.2.7.2 Global Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2026)

2.3 Semiconductor CMP Equipment Components Segment By Supply Model

- 2.3.1 OEM Original Spare Parts
- 2.3.2 Qualified Third-Party Replacement Parts
- 2.3.3 Semiconductor CMP Equipment Components Market Size By Supply Model
 - 2.3.3.1 Semiconductor CMP Equipment Components Market Size CAGR By Supply Model (2021 VS 2025 VS 2032)

- 2.3.3.2 Global Semiconductor CMP Equipment Components Market Size Market Share By Supply Model (2021-2026)
- 2.4 Semiconductor CMP Equipment Components Segment By Device Application
 - 2.4.1 Logic / Foundry CMP Components
 - 2.4.2 DRAM CMP Components
 - 2.4.3 3D NAND CMP Components
 - 2.4.4 Power / Analog / MEMS CMP Components
 - 2.4.5 Advanced Packaging CMP Components
 - 2.4.6 Other Specialty Device CMP Components
 - 2.4.7 Semiconductor CMP Equipment Components Market Size By Device Application
 - 2.4.7.1 Semiconductor CMP Equipment Components Market Size CAGR By Device Application (2021 VS 2025 VS 2032)
 - 2.4.7.2 Global Semiconductor CMP Equipment Components Market Size Market Share By Device Application (2021-2026)
- 2.5 Semiconductor CMP Equipment Components Segment By Wafer Size
 - 2.5.1 300mm CMP Tool Components
 - 2.5.2 200mm CMP Tool Components
 - 2.5.3 Others
 - 2.5.4 Semiconductor CMP Equipment Components Market Size By Wafer Size
 - 2.5.4.1 Semiconductor CMP Equipment Components Market Size CAGR By Wafer Size (2021 VS 2025 VS 2032)
 - 2.5.4.2 Global Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

3 SEMICONDUCTOR CMP EQUIPMENT COMPONENTS MARKET SIZE BY PLAYER

- 3.1 Semiconductor CMP Equipment Components Market Size Market Share by Player
 - 3.1.1 Global Semiconductor CMP Equipment Components Revenue by Player (2021-2026)
 - 3.1.2 Global Semiconductor CMP Equipment Components Revenue Market Share by Player (2021-2026)
- 3.2 Global Semiconductor CMP Equipment Components Key Players Head office and Products Offered
- 3.3 Market Concentration Rate Analysis
 - 3.3.1 Competition Landscape Analysis
 - 3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.4 New Products and Potential Entrants
- 3.5 Mergers & Acquisitions, Expansion

4 SEMICONDUCTOR CMP EQUIPMENT COMPONENTS BY REGION

4.1 Semiconductor CMP Equipment Components Market Size by Region (2021-2026)

4.2 Global Semiconductor CMP Equipment Components Annual Revenue by Country/Region (2021-2026)

4.3 Americas Semiconductor CMP Equipment Components Market Size Growth (2021-2026)

4.4 APAC Semiconductor CMP Equipment Components Market Size Growth (2021-2026)

4.5 Europe Semiconductor CMP Equipment Components Market Size Growth (2021-2026)

4.6 Middle East & Africa Semiconductor CMP Equipment Components Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Semiconductor CMP Equipment Components Market Size by Country (2021-2026)

5.2 Americas Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026)

5.3 Americas Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Semiconductor CMP Equipment Components Market Size by Region (2021-2026)

6.2 APAC Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026)

6.3 APAC Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Semiconductor CMP Equipment Components Market Size by Country
(2021-2026)

7.2 Europe Semiconductor CMP Equipment Components Market Size By Product Type
(2021-2026)

7.3 Europe Semiconductor CMP Equipment Components Market Size By Wafer Size
(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Semiconductor CMP Equipment Components by Region
(2021-2026)

8.2 Middle East & Africa Semiconductor CMP Equipment Components Market Size By
Product Type (2021-2026)

8.3 Middle East & Africa Semiconductor CMP Equipment Components Market Size By
Wafer Size (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL SEMICONDUCTOR CMP EQUIPMENT COMPONENTS MARKET

FORECAST

10.1 Global Semiconductor CMP Equipment Components Forecast by Region (2027-2032)

10.1.1 Global Semiconductor CMP Equipment Components Forecast by Region (2027-2032)

10.1.2 Americas Semiconductor CMP Equipment Components Forecast

10.1.3 APAC Semiconductor CMP Equipment Components Forecast

10.1.4 Europe Semiconductor CMP Equipment Components Forecast

10.1.5 Middle East & Africa Semiconductor CMP Equipment Components Forecast

10.2 Americas Semiconductor CMP Equipment Components Forecast by Country (2027-2032)

10.2.1 United States Market Semiconductor CMP Equipment Components Forecast

10.2.2 Canada Market Semiconductor CMP Equipment Components Forecast

10.2.3 Mexico Market Semiconductor CMP Equipment Components Forecast

10.2.4 Brazil Market Semiconductor CMP Equipment Components Forecast

10.3 APAC Semiconductor CMP Equipment Components Forecast by Region (2027-2032)

10.3.1 China Semiconductor CMP Equipment Components Market Forecast

10.3.2 Japan Market Semiconductor CMP Equipment Components Forecast

10.3.3 Korea Market Semiconductor CMP Equipment Components Forecast

10.3.4 Southeast Asia Market Semiconductor CMP Equipment Components Forecast

10.3.5 India Market Semiconductor CMP Equipment Components Forecast

10.3.6 Australia Market Semiconductor CMP Equipment Components Forecast

10.4 Europe Semiconductor CMP Equipment Components Forecast by Country (2027-2032)

10.4.1 Germany Market Semiconductor CMP Equipment Components Forecast

10.4.2 France Market Semiconductor CMP Equipment Components Forecast

10.4.3 UK Market Semiconductor CMP Equipment Components Forecast

10.4.4 Italy Market Semiconductor CMP Equipment Components Forecast

10.4.5 Russia Market Semiconductor CMP Equipment Components Forecast

10.5 Middle East & Africa Semiconductor CMP Equipment Components Forecast by Region (2027-2032)

10.5.1 Egypt Market Semiconductor CMP Equipment Components Forecast

10.5.2 South Africa Market Semiconductor CMP Equipment Components Forecast

10.5.3 Israel Market Semiconductor CMP Equipment Components Forecast

10.5.4 Turkey Market Semiconductor CMP Equipment Components Forecast

10.6 Global Semiconductor CMP Equipment Components Forecast By Product Type (2027-2032)

10.7 Global Semiconductor CMP Equipment Components Forecast By Wafer Size (2027-2032)

10.7.1 GCC Countries Market Semiconductor CMP Equipment Components Forecast

11 KEY PLAYERS ANALYSIS

11.1 Applied Materials

11.1.1 Applied Materials Company Information

11.1.2 Applied Materials Semiconductor CMP Equipment Components Product Offered

11.1.3 Applied Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.1.4 Applied Materials Main Business Overview

11.1.5 Applied Materials Latest Developments

11.2 EBARA Corporation

11.2.1 EBARA Corporation Company Information

11.2.2 EBARA Corporation Semiconductor CMP Equipment Components Product Offered

11.2.3 EBARA Corporation Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 EBARA Corporation Main Business Overview

11.2.5 EBARA Corporation Latest Developments

11.3 Entegris

11.3.1 Entegris Company Information

11.3.2 Entegris Semiconductor CMP Equipment Components Product Offered

11.3.3 Entegris Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 Entegris Main Business Overview

11.3.5 Entegris Latest Developments

11.4 3M

11.4.1 3M Company Information

11.4.2 3M Semiconductor CMP Equipment Components Product Offered

11.4.3 3M Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 3M Main Business Overview

11.4.5 3M Latest Developments

11.5 Saesol Diamond

11.5.1 Saesol Diamond Company Information

11.5.2 Saesol Diamond Semiconductor CMP Equipment Components Product Offered

11.5.3 Saesol Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Saesol Diamond Main Business Overview

11.5.5 Saesol Diamond Latest Developments

11.6 KINIK Company

11.6.1 KINIK Company Company Information

11.6.2 KINIK Company Semiconductor CMP Equipment Components Product Offered

11.6.3 KINIK Company Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 KINIK Company Main Business Overview

11.6.5 KINIK Company Latest Developments

11.7 Entrepix

11.7.1 Entrepix Company Information

11.7.2 Entrepix Semiconductor CMP Equipment Components Product Offered

11.7.3 Entrepix Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Entrepix Main Business Overview

11.7.5 Entrepix Latest Developments

11.8 EHWA Diamond

11.8.1 EHWA Diamond Company Information

11.8.2 EHWA Diamond Semiconductor CMP Equipment Components Product Offered

11.8.3 EHWA Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 EHWA Diamond Main Business Overview

11.8.5 EHWA Diamond Latest Developments

11.9 ACCRETECH

11.9.1 ACCRETECH Company Information

11.9.2 ACCRETECH Semiconductor CMP Equipment Components Product Offered

11.9.3 ACCRETECH Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 ACCRETECH Main Business Overview

11.9.5 ACCRETECH Latest Developments

11.10 Shinhan Diamond

11.10.1 Shinhan Diamond Company Information

11.10.2 Shinhan Diamond Semiconductor CMP Equipment Components Product Offered

11.10.3 Shinhan Diamond Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 Shinhan Diamond Main Business Overview

- 11.10.5 Shinhan Diamond Latest Developments
- 11.11 Diamonex / BEST
 - 11.11.1 Diamonex / BEST Company Information
 - 11.11.2 Diamonex / BEST Semiconductor CMP Equipment Components Product Offered
 - 11.11.3 Diamonex / BEST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.11.4 Diamonex / BEST Main Business Overview
 - 11.11.5 Diamonex / BEST Latest Developments
- 11.12 DuraTek
 - 11.12.1 DuraTek Company Information
 - 11.12.2 DuraTek Semiconductor CMP Equipment Components Product Offered
 - 11.12.3 DuraTek Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 DuraTek Main Business Overview
 - 11.12.5 DuraTek Latest Developments
- 11.13 AION
 - 11.13.1 AION Company Information
 - 11.13.2 AION Semiconductor CMP Equipment Components Product Offered
 - 11.13.3 AION Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 AION Main Business Overview
 - 11.13.5 AION Latest Developments
- 11.14 ARC Precision
 - 11.14.1 ARC Precision Company Information
 - 11.14.2 ARC Precision Semiconductor CMP Equipment Components Product Offered
 - 11.14.3 ARC Precision Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 ARC Precision Main Business Overview
 - 11.14.5 ARC Precision Latest Developments
- 11.15 Calitech
 - 11.15.1 Calitech Company Information
 - 11.15.2 Calitech Semiconductor CMP Equipment Components Product Offered
 - 11.15.3 Calitech Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.15.4 Calitech Main Business Overview
 - 11.15.5 Calitech Latest Developments
- 11.16 IST
 - 11.16.1 IST Company Information

- 11.16.2 IST Semiconductor CMP Equipment Components Product Offered
- 11.16.3 IST Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
- 11.16.4 IST Main Business Overview
- 11.16.5 IST Latest Developments
- 11.17 Puri-Science
 - 11.17.1 Puri-Science Company Information
 - 11.17.2 Puri-Science Semiconductor CMP Equipment Components Product Offered
 - 11.17.3 Puri-Science Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 Puri-Science Main Business Overview
 - 11.17.5 Puri-Science Latest Developments
- 11.18 Nanjing Sanchao
 - 11.18.1 Nanjing Sanchao Company Information
 - 11.18.2 Nanjing Sanchao Semiconductor CMP Equipment Components Product Offered
 - 11.18.3 Nanjing Sanchao Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.18.4 Nanjing Sanchao Main Business Overview
 - 11.18.5 Nanjing Sanchao Latest Developments
- 11.19 Fluorocarbon Group
 - 11.19.1 Fluorocarbon Group Company Information
 - 11.19.2 Fluorocarbon Group Semiconductor CMP Equipment Components Product Offered
 - 11.19.3 Fluorocarbon Group Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.19.4 Fluorocarbon Group Main Business Overview
 - 11.19.5 Fluorocarbon Group Latest Developments
- 11.20 Junhua PEEK
 - 11.20.1 Junhua PEEK Company Information
 - 11.20.2 Junhua PEEK Semiconductor CMP Equipment Components Product Offered
 - 11.20.3 Junhua PEEK Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.20.4 Junhua PEEK Main Business Overview
 - 11.20.5 Junhua PEEK Latest Developments
- 11.21 Showa Industries
 - 11.21.1 Showa Industries Company Information
 - 11.21.2 Showa Industries Semiconductor CMP Equipment Components Product Offered

11.21.3 Showa Industries Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.21.4 Showa Industries Main Business Overview

11.21.5 Showa Industries Latest Developments

11.22 Atlas Fibre

11.22.1 Atlas Fibre Company Information

11.22.2 Atlas Fibre Semiconductor CMP Equipment Components Product Offered

11.22.3 Atlas Fibre Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.22.4 Atlas Fibre Main Business Overview

11.22.5 Atlas Fibre Latest Developments

11.23 MOS

11.23.1 MOS Company Information

11.23.2 MOS Semiconductor CMP Equipment Components Product Offered

11.23.3 MOS Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.23.4 MOS Main Business Overview

11.23.5 MOS Latest Developments

11.24 Materials Nano Engineering (MNE)

11.24.1 Materials Nano Engineering (MNE) Company Information

11.24.2 Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Product Offered

11.24.3 Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.24.4 Materials Nano Engineering (MNE) Main Business Overview

11.24.5 Materials Nano Engineering (MNE) Latest Developments

11.25 Nippon Steel & Sumikin Materials

11.25.1 Nippon Steel & Sumikin Materials Company Information

11.25.2 Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Product Offered

11.25.3 Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.25.4 Nippon Steel & Sumikin Materials Main Business Overview

11.25.5 Nippon Steel & Sumikin Materials Latest Developments

11.26 Willbe S&T

11.26.1 Willbe S&T Company Information

11.26.2 Willbe S&T Semiconductor CMP Equipment Components Product Offered

11.26.3 Willbe S&T Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

- 11.26.4 Willbe S&T Main Business Overview
- 11.26.5 Willbe S&T Latest Developments
- 11.27 Cnus Co., Ltd.
 - 11.27.1 Cnus Co., Ltd. Company Information
 - 11.27.2 Cnus Co., Ltd. Semiconductor CMP Equipment Components Product Offered
 - 11.27.3 Cnus Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.27.4 Cnus Co., Ltd. Main Business Overview
 - 11.27.5 Cnus Co., Ltd. Latest Developments
- 11.28 UIS Technologies
 - 11.28.1 UIS Technologies Company Information
 - 11.28.2 UIS Technologies Semiconductor CMP Equipment Components Product Offered
 - 11.28.3 UIS Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.28.4 UIS Technologies Main Business Overview
 - 11.28.5 UIS Technologies Latest Developments
- 11.29 Euroshore
 - 11.29.1 Euroshore Company Information
 - 11.29.2 Euroshore Semiconductor CMP Equipment Components Product Offered
 - 11.29.3 Euroshore Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.29.4 Euroshore Main Business Overview
 - 11.29.5 Euroshore Latest Developments
- 11.30 PTC, Inc.
 - 11.30.1 PTC, Inc. Company Information
 - 11.30.2 PTC, Inc. Semiconductor CMP Equipment Components Product Offered
 - 11.30.3 PTC, Inc. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.30.4 PTC, Inc. Main Business Overview
 - 11.30.5 PTC, Inc. Latest Developments
- 11.31 AKT Components Sdn Bhd
 - 11.31.1 AKT Components Sdn Bhd Company Information
 - 11.31.2 AKT Components Sdn Bhd Semiconductor CMP Equipment Components Product Offered
 - 11.31.3 AKT Components Sdn Bhd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.31.4 AKT Components Sdn Bhd Main Business Overview
 - 11.31.5 AKT Components Sdn Bhd Latest Developments

11.32 Ensinger

11.32.1 Ensinger Company Information

11.32.2 Ensinger Semiconductor CMP Equipment Components Product Offered

11.32.3 Ensinger Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.32.4 Ensinger Main Business Overview

11.32.5 Ensinger Latest Developments

11.33 Pall

11.33.1 Pall Company Information

11.33.2 Pall Semiconductor CMP Equipment Components Product Offered

11.33.3 Pall Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.33.4 Pall Main Business Overview

11.33.5 Pall Latest Developments

11.34 Cobetter

11.34.1 Cobetter Company Information

11.34.2 Cobetter Semiconductor CMP Equipment Components Product Offered

11.34.3 Cobetter Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.34.4 Cobetter Main Business Overview

11.34.5 Cobetter Latest Developments

11.35 Warde Tec

11.35.1 Warde Tec Company Information

11.35.2 Warde Tec Semiconductor CMP Equipment Components Product Offered

11.35.3 Warde Tec Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.35.4 Warde Tec Main Business Overview

11.35.5 Warde Tec Latest Developments

11.36 IV Technologies Co.,Ltd

11.36.1 IV Technologies Co.,Ltd Company Information

11.36.2 IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Product Offered

11.36.3 IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.36.4 IV Technologies Co.,Ltd Main Business Overview

11.36.5 IV Technologies Co.,Ltd Latest Developments

11.37 Pasco Precision Corp

11.37.1 Pasco Precision Corp Company Information

11.37.2 Pasco Precision Corp Semiconductor CMP Equipment Components Product

Offered

11.37.3 Pasco Precision Corp Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.37.4 Pasco Precision Corp Main Business Overview

11.37.5 Pasco Precision Corp Latest Developments

11.38 Konfoong Materials International (KFMI)

11.38.1 Konfoong Materials International (KFMI) Company Information

11.38.2 Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Product Offered

11.38.3 Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.38.4 Konfoong Materials International (KFMI) Main Business Overview

11.38.5 Konfoong Materials International (KFMI) Latest Developments

11.39 Jetway Technologies

11.39.1 Jetway Technologies Company Information

11.39.2 Jetway Technologies Semiconductor CMP Equipment Components Product Offered

11.39.3 Jetway Technologies Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.39.4 Jetway Technologies Main Business Overview

11.39.5 Jetway Technologies Latest Developments

11.40 Chia Ping Diamond Industrial Co., Ltd.

11.40.1 Chia Ping Diamond Industrial Co., Ltd. Company Information

11.40.2 Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Product Offered

11.40.3 Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Revenue, Gross Margin and Market Share (2021-2026)

11.40.4 Chia Ping Diamond Industrial Co., Ltd. Main Business Overview

11.40.5 Chia Ping Diamond Industrial Co., Ltd. Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Semiconductor CMP Equipment Components Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)
- Table 2. Semiconductor CMP Equipment Components Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of CMP Pad Conditioners / Diamond Disks
- Table 4. Major Players of CMP Retaining Rings / Retainer Rings
- Table 5. Major Players of CMP Head / Carrier Head Parts
- Table 6. Major Players of CMP Brushes / Post-CMP PVA Brushes
- Table 7. Major Players of CMP Tool-Specific Engineered Plastic Parts
- Table 8. Major Players of Other CMP Tool-Specific Spare Parts
- Table 9. Semiconductor CMP Equipment Components Market Size CAGR By Product Type (2021 VS 2025 VS 2032) & (\$ millions)
- Table 10. Global Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026) & (\$ millions)
- Table 11. Global Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2026)
- Table 12. Major Players of OEM Original Spare Parts
- Table 13. Major Players of Qualified Third-Party Replacement Parts
- Table 14. Semiconductor CMP Equipment Components Market Size CAGR By Supply Model (2021 VS 2025 VS 2032) & (\$ millions)
- Table 15. Global Semiconductor CMP Equipment Components Market Size By Supply Model (2021-2026) & (\$ millions)
- Table 16. Global Semiconductor CMP Equipment Components Market Size Market Share By Supply Model (2021-2026)
- Table 17. Major Players of Logic / Foundry CMP Components
- Table 18. Major Players of DRAM CMP Components
- Table 19. Major Players of 3D NAND CMP Components
- Table 20. Major Players of Power / Analog / MEMS CMP Components
- Table 21. Major Players of Advanced Packaging CMP Components
- Table 22. Major Players of Other Specialty Device CMP Components
- Table 23. Semiconductor CMP Equipment Components Market Size CAGR By Device Application (2021 VS 2025 VS 2032) & (\$ millions)
- Table 24. Global Semiconductor CMP Equipment Components Market Size By Device Application (2021-2026) & (\$ millions)
- Table 25. Global Semiconductor CMP Equipment Components Market Size Market

Share By Device Application (2021-2026)

Table 26. Semiconductor CMP Equipment Components Market Size CAGR By Wafer Size (2021 VS 2025 VS 2032) & (\$ millions)

Table 27. Global Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026) & (\$ millions)

Table 28. Global Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

Table 29. Global Semiconductor CMP Equipment Components Revenue by Player (2021-2026) & (\$ millions)

Table 30. Global Semiconductor CMP Equipment Components Revenue Market Share by Player (2021-2026)

Table 31. Semiconductor CMP Equipment Components Key Players Head office and Products Offered

Table 32. Semiconductor CMP Equipment Components Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 33. New Products and Potential Entrants

Table 34. Mergers & Acquisitions, Expansion

Table 35. Global Semiconductor CMP Equipment Components Market Size by Region (2021-2026) & (\$ millions)

Table 36. Global Semiconductor CMP Equipment Components Market Size Market Share by Region (2021-2026)

Table 37. Global Semiconductor CMP Equipment Components Revenue by Country/Region (2021-2026) & (\$ millions)

Table 38. Global Semiconductor CMP Equipment Components Revenue Market Share by Country/Region (2021-2026)

Table 39. Americas Semiconductor CMP Equipment Components Market Size by Country (2021-2026) & (\$ millions)

Table 40. Americas Semiconductor CMP Equipment Components Market Size Market Share by Country (2021-2026)

Table 41. Americas Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026) & (\$ millions)

Table 42. Americas Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2026)

Table 43. Americas Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026) & (\$ millions)

Table 44. Americas Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

Table 45. APAC Semiconductor CMP Equipment Components Market Size by Region (2021-2026) & (\$ millions)

Table 46. APAC Semiconductor CMP Equipment Components Market Size Market Share by Region (2021-2026)

Table 47. APAC Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026) & (\$ millions)

Table 48. APAC Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026) & (\$ millions)

Table 49. Europe Semiconductor CMP Equipment Components Market Size by Country (2021-2026) & (\$ millions)

Table 50. Europe Semiconductor CMP Equipment Components Market Size Market Share by Country (2021-2026)

Table 51. Europe Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026) & (\$ millions)

Table 52. Europe Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026) & (\$ millions)

Table 53. Middle East & Africa Semiconductor CMP Equipment Components Market Size by Region (2021-2026) & (\$ millions)

Table 54. Middle East & Africa Semiconductor CMP Equipment Components Market Size By Product Type (2021-2026) & (\$ millions)

Table 55. Middle East & Africa Semiconductor CMP Equipment Components Market Size By Wafer Size (2021-2026) & (\$ millions)

Table 56. Key Market Drivers & Growth Opportunities of Semiconductor CMP Equipment Components

Table 57. Key Market Challenges & Risks of Semiconductor CMP Equipment Components

Table 58. Key Industry Trends of Semiconductor CMP Equipment Components

Table 59. Global Semiconductor CMP Equipment Components Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 60. Global Semiconductor CMP Equipment Components Market Size Market Share Forecast by Region (2027-2032)

Table 61. Global Semiconductor CMP Equipment Components Market Size Forecast By Product Type (2027-2032) & (\$ millions)

Table 62. Global Semiconductor CMP Equipment Components Market Size Forecast By Wafer Size (2027-2032) & (\$ millions)

Table 63. Applied Materials Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 64. Applied Materials Semiconductor CMP Equipment Components Product Offered

Table 65. Applied Materials Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 66. Applied Materials Main Business
Table 67. Applied Materials Latest Developments
Table 68. EBARA Corporation Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 69. EBARA Corporation Semiconductor CMP Equipment Components Product Offered
Table 70. EBARA Corporation Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 71. EBARA Corporation Main Business
Table 72. EBARA Corporation Latest Developments
Table 73. Entegris Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 74. Entegris Semiconductor CMP Equipment Components Product Offered
Table 75. Entegris Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 76. Entegris Main Business
Table 77. Entegris Latest Developments
Table 78. 3M Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 79. 3M Semiconductor CMP Equipment Components Product Offered
Table 80. 3M Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 81. 3M Main Business
Table 82. 3M Latest Developments
Table 83. Saesol Diamond Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 84. Saesol Diamond Semiconductor CMP Equipment Components Product Offered
Table 85. Saesol Diamond Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 86. Saesol Diamond Main Business
Table 87. Saesol Diamond Latest Developments
Table 88. KINIK Company Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 89. KINIK Company Semiconductor CMP Equipment Components Product Offered
Table 90. KINIK Company Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 91. KINIK Company Main Business

Table 92. KINIK Company Latest Developments

Table 93. Entrepix Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 94. Entrepix Semiconductor CMP Equipment Components Product Offered

Table 95. Entrepix Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 96. Entrepix Main Business

Table 97. Entrepix Latest Developments

Table 98. EHWA Diamond Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 99. EHWA Diamond Semiconductor CMP Equipment Components Product Offered

Table 100. EHWA Diamond Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 101. EHWA Diamond Main Business

Table 102. EHWA Diamond Latest Developments

Table 103. ACCRETECH Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 104. ACCRETECH Semiconductor CMP Equipment Components Product Offered

Table 105. ACCRETECH Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 106. ACCRETECH Main Business

Table 107. ACCRETECH Latest Developments

Table 108. Shinhan Diamond Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 109. Shinhan Diamond Semiconductor CMP Equipment Components Product Offered

Table 110. Shinhan Diamond Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 111. Shinhan Diamond Main Business

Table 112. Shinhan Diamond Latest Developments

Table 113. Diamonex / BEST Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 114. Diamonex / BEST Semiconductor CMP Equipment Components Product Offered

Table 115. Diamonex / BEST Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 116. Diamonex / BEST Main Business

Table 117. Diamonex / BEST Latest Developments

Table 118. DuraTek Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 119. DuraTek Semiconductor CMP Equipment Components Product Offered

Table 120. DuraTek Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 121. DuraTek Main Business

Table 122. DuraTek Latest Developments

Table 123. AION Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 124. AION Semiconductor CMP Equipment Components Product Offered

Table 125. AION Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 126. AION Main Business

Table 127. AION Latest Developments

Table 128. ARC Precision Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 129. ARC Precision Semiconductor CMP Equipment Components Product Offered

Table 130. ARC Precision Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 131. ARC Precision Main Business

Table 132. ARC Precision Latest Developments

Table 133. Calitech Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 134. Calitech Semiconductor CMP Equipment Components Product Offered

Table 135. Calitech Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 136. Calitech Main Business

Table 137. Calitech Latest Developments

Table 138. IST Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 139. IST Semiconductor CMP Equipment Components Product Offered

Table 140. IST Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 141. IST Main Business

Table 142. IST Latest Developments

Table 143. Puri-Science Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 144. Puri-Science Semiconductor CMP Equipment Components Product Offered
Table 145. Puri-Science Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 146. Puri-Science Main Business
Table 147. Puri-Science Latest Developments
Table 148. Nanjing Sanchao Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 149. Nanjing Sanchao Semiconductor CMP Equipment Components Product Offered
Table 150. Nanjing Sanchao Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 151. Nanjing Sanchao Main Business
Table 152. Nanjing Sanchao Latest Developments
Table 153. Fluorocarbon Group Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 154. Fluorocarbon Group Semiconductor CMP Equipment Components Product Offered
Table 155. Fluorocarbon Group Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 156. Fluorocarbon Group Main Business
Table 157. Fluorocarbon Group Latest Developments
Table 158. Junhua PEEK Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 159. Junhua PEEK Semiconductor CMP Equipment Components Product Offered
Table 160. Junhua PEEK Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 161. Junhua PEEK Main Business
Table 162. Junhua PEEK Latest Developments
Table 163. Showa Industries Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors
Table 164. Showa Industries Semiconductor CMP Equipment Components Product Offered
Table 165. Showa Industries Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 166. Showa Industries Main Business
Table 167. Showa Industries Latest Developments
Table 168. Atlas Fibre Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 169. Atlas Fibre Semiconductor CMP Equipment Components Product Offered

Table 170. Atlas Fibre Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 171. Atlas Fibre Main Business

Table 172. Atlas Fibre Latest Developments

Table 173. MOS Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 174. MOS Semiconductor CMP Equipment Components Product Offered

Table 175. MOS Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 176. MOS Main Business

Table 177. MOS Latest Developments

Table 178. Materials Nano Engineering (MNE) Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 179. Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Product Offered

Table 180. Materials Nano Engineering (MNE) Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 181. Materials Nano Engineering (MNE) Main Business

Table 182. Materials Nano Engineering (MNE) Latest Developments

Table 183. Nippon Steel & Sumikin Materials Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 184. Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Product Offered

Table 185. Nippon Steel & Sumikin Materials Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 186. Nippon Steel & Sumikin Materials Main Business

Table 187. Nippon Steel & Sumikin Materials Latest Developments

Table 188. Willbe S&T Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 189. Willbe S&T Semiconductor CMP Equipment Components Product Offered

Table 190. Willbe S&T Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 191. Willbe S&T Main Business

Table 192. Willbe S&T Latest Developments

Table 193. Cnus Co., Ltd. Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 194. Cnus Co., Ltd. Semiconductor CMP Equipment Components Product Offered

Table 195. Cnus Co., Ltd. Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 196. Cnus Co., Ltd. Main Business

Table 197. Cnus Co., Ltd. Latest Developments

Table 198. UIS Technologies Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 199. UIS Technologies Semiconductor CMP Equipment Components Product Offered

Table 200. UIS Technologies Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 201. UIS Technologies Main Business

Table 202. UIS Technologies Latest Developments

Table 203. Euroshore Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 204. Euroshore Semiconductor CMP Equipment Components Product Offered

Table 205. Euroshore Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 206. Euroshore Main Business

Table 207. Euroshore Latest Developments

Table 208. PTC, Inc. Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 209. PTC, Inc. Semiconductor CMP Equipment Components Product Offered

Table 210. PTC, Inc. Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 211. PTC, Inc. Main Business

Table 212. PTC, Inc. Latest Developments

Table 213. AKT Components Sdn Bhd Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 214. AKT Components Sdn Bhd Semiconductor CMP Equipment Components Product Offered

Table 215. AKT Components Sdn Bhd Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 216. AKT Components Sdn Bhd Main Business

Table 217. AKT Components Sdn Bhd Latest Developments

Table 218. Ensinger Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 219. Ensinger Semiconductor CMP Equipment Components Product Offered

Table 220. Ensinger Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 221. Ensinger Main Business

Table 222. Ensinger Latest Developments

Table 223. Pall Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 224. Pall Semiconductor CMP Equipment Components Product Offered

Table 225. Pall Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 226. Pall Main Business

Table 227. Pall Latest Developments

Table 228. Cobetter Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 229. Cobetter Semiconductor CMP Equipment Components Product Offered

Table 230. Cobetter Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 231. Cobetter Main Business

Table 232. Cobetter Latest Developments

Table 233. Warde Tec Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 234. Warde Tec Semiconductor CMP Equipment Components Product Offered

Table 235. Warde Tec Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 236. Warde Tec Main Business

Table 237. Warde Tec Latest Developments

Table 238. IV Technologies Co.,Ltd Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 239. IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Product Offered

Table 240. IV Technologies Co.,Ltd Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 241. IV Technologies Co.,Ltd Main Business

Table 242. IV Technologies Co.,Ltd Latest Developments

Table 243. Pasco Precision Corp Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 244. Pasco Precision Corp Semiconductor CMP Equipment Components Product Offered

Table 245. Pasco Precision Corp Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 246. Pasco Precision Corp Main Business

Table 247. Pasco Precision Corp Latest Developments

Table 248. Konfoong Materials International (KFMI) Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 249. Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Product Offered

Table 250. Konfoong Materials International (KFMI) Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 251. Konfoong Materials International (KFMI) Main Business

Table 252. Konfoong Materials International (KFMI) Latest Developments

Table 253. Jetway Technologies Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 254. Jetway Technologies Semiconductor CMP Equipment Components Product Offered

Table 255. Jetway Technologies Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 256. Jetway Technologies Main Business

Table 257. Jetway Technologies Latest Developments

Table 258. Chia Ping Diamond Industrial Co., Ltd. Details, Company Type, Semiconductor CMP Equipment Components Area Served and Its Competitors

Table 259. Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Product Offered

Table 260. Chia Ping Diamond Industrial Co., Ltd. Semiconductor CMP Equipment Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 261. Chia Ping Diamond Industrial Co., Ltd. Main Business

Table 262. Chia Ping Diamond Industrial Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor CMP Equipment Components Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Semiconductor CMP Equipment Components Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Semiconductor CMP Equipment Components Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Semiconductor CMP Equipment Components Sales Market Share by Country/Region (2025)

Figure 8. Semiconductor CMP Equipment Components Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Semiconductor CMP Equipment Components Market Size Market Share By Product Type in 2025

Figure 10. Global Semiconductor CMP Equipment Components Market Size Market Share By Supply Model in 2025

Figure 11. Global Semiconductor CMP Equipment Components Market Size Market Share By Device Application in 2025

Figure 12. Semiconductor CMP Equipment Components in 300mm CMP Tool Components

Figure 13. Global Semiconductor CMP Equipment Components Market: 300mm CMP Tool Components (2021-2026) & (\$ millions)

Figure 14. Semiconductor CMP Equipment Components in 200mm CMP Tool Components

Figure 15. Global Semiconductor CMP Equipment Components Market: 200mm CMP Tool Components (2021-2026) & (\$ millions)

Figure 16. Semiconductor CMP Equipment Components in Others

Figure 17. Global Semiconductor CMP Equipment Components Market: Others (2021-2026) & (\$ millions)

Figure 18. Global Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size in 2025

Figure 19. Global Semiconductor CMP Equipment Components Revenue Market Share by Player in 2025

Figure 20. Global Semiconductor CMP Equipment Components Market Size Market Share by Region (2021-2026)

Figure 21. Americas Semiconductor CMP Equipment Components Market Size 2021-2026 (\$ millions)

Figure 22. APAC Semiconductor CMP Equipment Components Market Size 2021-2026 (\$ millions)

Figure 23. Europe Semiconductor CMP Equipment Components Market Size 2021-2026 (\$ millions)

Figure 24. Middle East & Africa Semiconductor CMP Equipment Components Market Size 2021-2026 (\$ millions)

Figure 25. Americas Semiconductor CMP Equipment Components Value Market Share by Country in 2025

Figure 26. United States Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 27. Canada Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 28. Mexico Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 29. Brazil Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 30. APAC Semiconductor CMP Equipment Components Market Size Market Share by Region in 2025

Figure 31. APAC Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2026)

Figure 32. APAC Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

Figure 33. China Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 34. Japan Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 35. South Korea Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 36. Southeast Asia Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 37. India Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 38. Australia Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 39. Europe Semiconductor CMP Equipment Components Market Size Market Share by Country in 2025

Figure 40. Europe Semiconductor CMP Equipment Components Market Size Market

Share By Product Type (2021-2026)

Figure 41. Europe Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

Figure 42. Germany Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 43. France Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 44. UK Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 45. Italy Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 46. Russia Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 47. Middle East & Africa Semiconductor CMP Equipment Components Market Size Market Share by Region (2021-2026)

Figure 48. Middle East & Africa Semiconductor CMP Equipment Components Market Size Market Share By Product Type (2021-2026)

Figure 49. Middle East & Africa Semiconductor CMP Equipment Components Market Size Market Share By Wafer Size (2021-2026)

Figure 50. Egypt Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 51. South Africa Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 52. Israel Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 53. Turkey Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 54. GCC Countries Semiconductor CMP Equipment Components Market Size Growth 2021-2026 (\$ millions)

Figure 55. Americas Semiconductor CMP Equipment Components Market Size 2027-2032 (\$ millions)

Figure 56. APAC Semiconductor CMP Equipment Components Market Size 2027-2032 (\$ millions)

Figure 57. Europe Semiconductor CMP Equipment Components Market Size 2027-2032 (\$ millions)

Figure 58. Middle East & Africa Semiconductor CMP Equipment Components Market Size 2027-2032 (\$ millions)

Figure 59. United States Semiconductor CMP Equipment Components Market Size 2027-2032 (\$ millions)

Figure 60. Canada Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 61. Mexico Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 62. Brazil Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 63. China Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 64. Japan Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 65. Korea Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 66. Southeast Asia Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 67. India Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 68. Australia Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 69. Germany Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 70. France Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 71. UK Semiconductor CMP Equipment Components Market Size 2027-2032 (\$
millions)

Figure 72. Italy Semiconductor CMP Equipment Components Market Size 2027-2032 (\$
millions)

Figure 73. Russia Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 74. Egypt Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 75. South Africa Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

Figure 76. Israel Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 77. Turkey Semiconductor CMP Equipment Components Market Size 2027-2032
(\$ millions)

Figure 78. Global Semiconductor CMP Equipment Components Market Size Market
Share Forecast By Product Type (2027-2032)

Figure 79. Global Semiconductor CMP Equipment Components Market Size Market

Share Forecast By Wafer Size (2027-2032)

Figure 80. GCC Countries Semiconductor CMP Equipment Components Market Size
2027-2032 (\$ millions)

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