

Global SiC CMP Pads Market Growth 2026-2032

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Abstracts

The global SiC CMP Pads market size is predicted to grow from US\$ 77.27 million in 2025 to US\$ 255 million in 2032; it is expected to grow at a CAGR of 16.4% from 2026 to 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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for SiC CMP Pads 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 SiC CMP Pads.

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

Segmentation by Type:

Hard Pads

Soft Pads

Segmentation by End Users:

Foundry

IDM

Segmentation by Sales Channel:

Direct Sales

Distribution

Segmentation by Application:

4 Inch SiC Wafer

6 Inch SiC Wafer

8 Inch SiC Wafer

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.

Qnity

Fujibo Group

Entegris

IVT Technologies

Hubei Dinglong

Wuxi Jizhi Electronic Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global SiC CMP Pads market?

What factors are driving SiC CMP Pads market growth, globally and by region?

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

How do SiC CMP Pads market opportunities vary by end market size?

How does SiC CMP Pads break out by Type, by Application?

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