

# Global Spin-on Glass Process Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Spin-on Glass Process market size is expected to reach \$ 1556 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

Spin-on Glass (SOG) and Spin-on Dielectric (SOD) materials and process services refer to a specialized class of semiconductor and microfabrication process solutions in which liquid silicon-containing glass precursors, silicate or siloxane systems, perhydropolysilazane-based dielectrics, doped glass formulations, or other dielectric coating materials are dispensed onto wafers or substrates and converted into glass-like, silicon oxide, or dielectric films through spin coating, post-apply baking, curing, annealing, oxidation, etch-back, and defect-control steps.

Based on our research, the Spin-on Glass process should not be treated as a standalone outsourced service market. Its commercial structure is better understood as a specialized semiconductor process-material ecosystem consisting of SOG/SOD materials, formulation support, customer-specific process development, limited external coating trials, and enabling coating/baking equipment. In high-volume semiconductor fabs, the actual spin coating, post-apply baking, curing, and etch-back steps are typically performed internally and do not generate separate merchant revenue. Therefore, this study keeps material suppliers, equipment OEMs, and process-service providers in the longlist to preserve supply-chain completeness, while the revenue model adopts a narrow scope that includes only merchant SOG/SOD materials and external process services. This prevents the market size from being overstated by including internal wafer-fab process value or the full revenue of general coating/developing equipment.

From a supply-side perspective, SOG/SOD is a concentrated and technically

demanding niche. The market is shaped by long qualification cycles, strict impurity control, customer-specific integration windows, and high switching costs once a material is qualified. Merck, Solstice Advanced Materials, Samsung SDI, Qnity Electronics, DNF, and UP Chemical/Yoke represent the core high-confidence supplier group for advanced SOG/SOD or closely related spin-on dielectric materials. Filmtronics, Desert Silicon, and Futurrex serve more specialized, custom, and R&D-oriented demand. Brewer Science, JSR, and Shin-Etsu MicroSi are important in adjacent spin-on hardmask, silicon hardmask, and advanced-packaging dielectric materials. Equipment suppliers such as Tokyo Electron, TAZMO, EV Group, S-Cubed, C&D Semiconductor Services, S?SS MicroTec, and SCREEN support the process ecosystem, but their equipment revenue should be treated separately from the narrow SOG/SOD material and service market.

From a demand perspective, SOG/SOD remains valuable where liquid-phase gap fill, local planarization, dielectric isolation, passivation, hardmask support, or dopant-source formation provides an integration advantage over purely dry deposition routes. CVD, ALD, and CMP remain the dominant mainstream process families for many dielectric and planarization needs, but SOG/SOD can offer attractive cost of ownership, gap-fill behavior, and process simplicity in selected applications. Demand is concentrated in memory, 3D NAND, DRAM, advanced logic, power devices, MEMS, optical waveguides, display-related structures, and advanced packaging. Future growth is expected to come not from broad replacement of dry deposition, but from incremental adoption in narrower, technically demanding structures that require low-defect, high-purity, and process-compatible spin-on dielectric films.

The competitive landscape is also being reshaped by corporate portfolio moves and regional supply-chain localization. Honeywell completed the spin-off of Solstice Advanced Materials in 2025, while DuPont completed the separation of Qnity Electronics in the same year, meaning that current supplier mapping should use the new independent entities rather than legacy parent-company names. Japan, Korea, Europe, and the United States still dominate high-end formulations and customer-qualified supply. China has entered the chain partly through Jiangsu Yoke Technology's ownership of UP Chemical, while purely domestic publicly verifiable SOG/SOD manufacturing remains more limited. Over the medium term, the market should benefit from AI-driven semiconductor demand, HBM, advanced memory, advanced packaging, and localization policies, while facing substitution pressure from CVD/ALD gap-fill, CMP, dry dielectric deposition, and alternative spin-on hardmask technologies.

This report studies the global Spin-on Glass Process demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Spin-on Glass Process, 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 Spin-on Glass Process that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Spin-on Glass Process total market, 2021-2032, (USD Million)

Global Spin-on Glass Process total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Spin-on Glass Process total market, key domestic companies, and share, (USD Million)

Global Spin-on Glass Process revenue by player, revenue and market share 2021-2026, (USD Million)

Global Spin-on Glass Process total market by Type, CAGR, 2021-2032, (USD Million)

Global Spin-on Glass Process total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Spin-on Glass Process market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Merck KGaA, Solstice Advanced Materials, Samsung SDI, Qnity Electronics, UP Chemical, Filmtronics, Desert Silicon, Futurrex, Brewer Science, JSR, 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 Spin-on Glass Process market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Spin-on Glass Process Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Spin-on Glass Process Market, Segmentation by Type:

Silicate-based SOG

Silicone-based SOG

Doped SOG

Others

Global Spin-on Glass Process Market, Segmentation by Curing Temperature:

Low-Temperature Curing SOG

Medium-Temperature Curing SOG

High-Temperature Curing SOG

## Global Spin-on Glass Process Market, Segmentation by Product Form:

Undoped Spin-on Glass

Doped Spin-on Glass

Spin-on Dielectric

Others

## Global Spin-on Glass Process Market, Segmentation by Application:

Semiconductor Manufacturing

Display Panels

Automotive Electronics

Others

## Companies Profiled:

Merck KGaA

Solstice Advanced Materials

Samsung SDI

Qnity Electronics

UP Chemical

Filmtronics

Desert Silicon

Futurrex

Brewer Science

JSR

Shin-Etsu MicroSi

Tokyo Electron

Xi'an Lvshan Semiconductor

CSSID

TAZMO

EV Group

#### Key Questions Answered

1. How big is the global Spin-on Glass Process market?
2. What is the demand of the global Spin-on Glass Process market?
3. What is the year over year growth of the global Spin-on Glass Process market?
4. What is the total value of the global Spin-on Glass Process market?
5. Who are the Major Players in the global Spin-on Glass Process market?
6. What are the growth factors driving the market demand?

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