

Silicon on Insulator Market by Smart Cut SOI, Bonding SOI, Layer Transfer SOI, RF-SOI, Power -SOI, FD-SOI, RF FEM, MEMS Devices, Optical Communication, Image Sensing Devices, Automotive and Military & Defense - Global Forecast to 2029

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Abstracts

The global silicon on insulator market was valued at USD 1.29 billion in 2024 and is projected to reach USD 2.55 billion by 2029; it is expected to register a CAGR of 14.7% during the forecast period. SOI technology is well-suited for the fabrication of smaller transistors, enabling higher device densities and increased functionality and silicon wastage prevention in thin-wafer manufacturing and establishment is driving the growth of the silicon on insulator market, while floating body and self-heating effects in SOI-based devices are restraining it.

“The bonding segment is expected to grow at a significant CAGR during the forecast period.”

The bonding segment is projected to grow at a significant rate while attaining a CAGR during the forecast. The growth of the segment is attributed to the advancements in bonding technologies that improved the manufacturing of SOI wafers at lower costs. This results in reduced cost of implementing SOI technology, hence expanding its further applicability in other fields such as consumer electronics and automotive industries, among others. Moreover, increased material bonding technology allows the manufacturing of larger sized SOI wafers, a requirement for the developing high-demanding applications in telecommunication, automobile, and consumer electronics industries. Bigger wafers enable many chips to be produced from a single piece of silicon, resulting in high productivity.

“RF-SOI is likely to capture the highest share during the 2023”

The market in RF-SOI wafer type is expected to capture the highest share in 2023. The growing demand for RF-SOI wafers is driven by advancements in wireless communication, the automotive industry, aerospace and defense, medical devices, and consumer electronic. All smartphones use RF-SOI wafers. The increasing adoption of ADAS features in vehicles, such as radar, lidar, and wireless connectivity, necessitates high-performance RF components. RF-SOI wafers provide the necessary characteristics for these applications. Also, the increasing demand for other components, such as digital and RF chips, also drives the market for RF-SOI wafers. Their unique properties, such as low power consumption, high integration density, and excellent RF performance, make them a valuable technology for a wide range of applications.

“The Europe is likely to capture the highest share during the 2023.”

The market in Europe is expected to capture the highest share in 2023. The market growth can be attributed to the European automotive market that has been using SOI technology in its products. The existence of major auto manufacturing industries includes Audi, Mercedes Benz, BMW Group, Daimler, Fiat Chrysler Automobiles, Opel Group, PSA Group, Renault organization, and Volkswagen Group, among others. Moreover, in March 2024, the manufacturing unit STMicroelectronics changed the STM32 microcontrollers to an 18nm Fully Depleted Silicon On Insulator (FD-SOI) manufacturing process with integrated Phase Change Memory.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type - Tier 1 – 35%, Tier 2 – 45%, Tier 3 – 20%

By Designation— C-level Executives - 40%, Directors - 30%, Others - 30%

By Region—North America - 40%, Europe - 20%, Asia Pacific - 30%, RoW - 10%

The silicon on insulator market is dominated by a few globally established players such as SOITEC (France), Shin-Etsu Chemical Co., Ltd. (Japan), GlobalWafers (Taiwan),

SUMCO Corporation (Japan), Shanghai Simgui Technology Co., Ltd. (China), GlobalFoundries (US), STMicroelectronics (Switzerland), Tower Semiconductors (Israel), Silicon Valley Microelectronics, Inc (US). The study includes an in-depth competitive analysis of these key players in the silicon on insulator market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the silicon on insulator market and forecasts its size by wafer size, wafer type, technology, product, application, and region. The report also discusses the drivers, restraints, opportunities, and challenges of the market. It gives a detailed view of the market across four main regions—North America, Europe, Asia Pacific, and RoW. Supply chain analysis has been included in the report, along with the key players and their competitive analysis in the silicon on insulator ecosystem.

Key Benefits to Buy the Report:

Analysis of key drivers (Increased investments in the SOI ecosystem, growth in the use of SOI wafers in consumer electronics, reduced overall cost of semiconductor devices by minimizing silicon wastage while manufacturing thin SOI wafers). Restraint (Floating body and self-heating effects in SOI-based devices, Limited availability of existing intellectual property ecosystems to fabless companies), Opportunity (Growing integrated chip industry and expanding SOI ecosystem in the Asia Pacific, Increasing use of SOI technology in IoT devices and applications), Challenges (Volatility and susceptibility of SOI-based wafers to damage caused by pressure or stress)

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the silicon on insulator market.

Market Development: Comprehensive information about lucrative markets – the report analyses the silicon on insulator market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the silicon on insulator market.

Competitive Assessment: In-depth assessment of market shares, growth

strategies, and service offerings of leading players in the silicon on insulator market, such as SOITEC (France), Shin-Etsu Chemical Co., Ltd. (Japan), GlobalWafers (Taiwan), SUMCO Corporation (Japan), and Shanghai Simgui Technology Co., Ltd. (China).

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