

# Quartz Glass Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Quartz Glass Market Summary

#### Introduction

Quartz glass, also known as fused silica, is a high-purity, transparent material renowned for its exceptional properties, including high thermal resistance, low thermal expansion, excellent optical clarity, and chemical inertness. These characteristics make it a critical component across a variety of high-tech industries, such as lighting, optical fibers, semiconductors, optics, and photovoltaics. The Quartz Glass market is experiencing robust growth, propelled by the increasing demand for advanced materials in semiconductor manufacturing and the rapid expansion of the photovoltaic sector. In semiconductors, quartz glass is vital for diffusion and etching processes, while in photovoltaics, it supports the production of high-efficiency monocrystalline silicon through the crystal pulling process. The market is characterized by a concentrated group of global leaders, including Heraeus Covantics, Tosoh, and Shin-Etsu Quartz Products Co. Ltd., alongside significant players like SCHOTT AG, which recently acquired the quartz glass business of QSIL Corporation in December 2024, with the transaction set to close in January 2025. The Quartz Glass market is estimated to reach a valuation of USD 3.5-6.5 billion by 2025, with a projected compound annual growth rate (CAGR) of 4.5%-8.5% from 2025 to 2030, reflecting its pivotal role in technological advancements and renewable energy solutions.

#### Market Size and Growth Forecast

The Quartz Glass market is anticipated to achieve a size of USD 3.5-6.5 billion by 2025,

with a CAGR ranging from 4.5% to 8.5% through 2030. This growth is driven by the escalating needs of the semiconductor and photovoltaic industries, where quartz glass serves as an indispensable material. Additional momentum comes from advancements in optical fibers and specialty lighting applications, although challenges such as high production costs and competitive pressures from alternative materials may temper the pace of expansion.

## Regional Analysis

The Quartz Glass market exhibits varied growth patterns across regions, influenced by industrial capabilities, technological innovation, and energy demands.

**Asia Pacific:** Growth is estimated at 5.5% to 9.5%. This region, spearheaded by China, Japan, and South Korea, is the global leader due to its dominance in semiconductor and photovoltaic production. China's photovoltaic sector is booming, with installations projected to reach 540 GW by 2028, fueling demand for high-purity quartz crucibles. Japan and South Korea, with their advanced semiconductor ecosystems, rely heavily on quartz for wafer processing, driven by trends in AI, 5G, and high-performance computing (HPC).

**North America:** Growth ranges from 4.0% to 8.0%. The United States stands out with its strong semiconductor industry and growing investments in renewable energy. Market trends emphasize innovation in optical fibers and specialty glass, supported by the push for AI and HPC technologies.

**Europe:** Growth is projected at 4.5% to 8.5%. Germany and the Netherlands lead, with demand stemming from automotive optics, photovoltaics, and industrial lighting. Trends focus on sustainability and energy efficiency, boosting quartz use in solar energy and smart infrastructure applications.

**Rest of the World:** Growth is estimated at 3.5% to 7.5%. Emerging markets like India and Brazil show promise in photovoltaics and industrial applications, though their contributions remain smaller compared to Asia Pacific.

## Application Analysis

Quartz Glass serves a broad spectrum of applications, each with distinct growth trajectories and technological trends.

**Lighting:** Growth ranges from 2.0% to 4.0%. Traditional quartz light sources are waning due to the rise of LEDs, but specialty quartz lamps for infrared heating, UV curing, and disinfection are seeing steady growth. These applications leverage quartz's unique thermal and optical properties, with trends favoring energy-efficient solutions.

**Optical Fiber:** Growth is estimated at 5.0% to 9.0%. The deployment of 400G networks and G.654E fibers, alongside the rise of fiber-to-the-room (FTTR) technology, drives demand for high-purity quartz in fiber optics. Trends focus on enhancing bandwidth and minimizing signal loss to support the digital economy.

**Semiconductor:** Growth ranges from 6.0% to 10.0%. Quartz glass is essential in diffusion and etching processes, with components like quartz rings, boats, and furnace tubes critical to wafer production. The surge in AI, HPC, and automotive chip demand accelerates growth, with trends emphasizing ultra-high purity materials for advanced semiconductor nodes.

**Optics:** Growth is projected at 4.5% to 8.5%. Quartz glass is used in lenses, mirrors, and prisms for applications ranging from cameras to autonomous vehicles. Trends highlight precision optics for cutting-edge imaging and optoelectronic systems.

**Photovoltaic:** Growth ranges from 5.5% to 9.5%. The shift to N-type monocrystalline silicon and advanced battery technologies like TOPCon and XBC increases demand for high-quality quartz crucibles and furnace tubes. Trends focus on improving solar cell efficiency and reducing production costs.

**Others:** Growth is estimated at 3.0% to 6.0%. Niche uses in aerospace and medical devices contribute modestly, with trends toward tailored, high-performance quartz solutions.

## Key Market Players

The Quartz Glass market features a blend of established global leaders and regional specialists.

**Heraeus Covantics:** A German innovator, Heraeus excels in supplying quartz glass for semiconductors, optics, and photovoltaics with cutting-edge technology.

**Tosoh:** Based in Japan, Tosoh provides high-purity quartz for semiconductor and optical applications, leveraging its chemical expertise.

**Shin-Etsu Quartz Products Co. Ltd.:** A Japanese leader, it supports Asia's tech hubs with quartz components for semiconductors and photovoltaics.

**SCHOTT AG:** Headquartered in Germany, SCHOTT expanded its quartz offerings through the 2024 acquisition of QSIL, targeting industrial and optical markets.

**AGC:** A Japanese firm, AGC focuses on precision quartz solutions for electronics and photovoltaics.

**OHARA Corporation:** Based in Japan, OHARA specializes in optical quartz for lenses and scientific instruments.

**CoorsTek:** A U.S. company, CoorsTek supplies quartz components for semiconductor and industrial uses.

**Nikon:** In Japan, Nikon utilizes quartz glass in its advanced optics and imaging systems.

**Hubei Feilihua Quartz Glass Co. Ltd.:** A Chinese manufacturer, it serves the photovoltaic and industrial quartz markets.

**Jiangsu Pacific Quartz Co. Ltd.:** With a 60,000-ton capacity, this Chinese firm is a major supplier for photovoltaics and semiconductors.

### Porter's Five Forces Analysis

The competitive dynamics of the Quartz Glass market can be evaluated using Porter's Five Forces framework.

**Threat of New Entrants:** Low to moderate. High capital requirements, technical expertise, and stringent purity standards pose significant barriers, though emerging Asian players are making inroads with localized strategies.

**Threat of Substitutes:** Low. Few materials rival quartz glass's unique combination of properties, although alternatives like sapphire and specialty

ceramics compete in specific niches.

**Bargaining Power of Buyers:** Moderate. Large semiconductor and photovoltaic firms exert influence due to their scale, but the specialized nature of quartz products limits their options.

**Bargaining Power of Suppliers:** Moderate to high. The supply of high-purity quartz sand and chemical inputs is controlled by a few key players, giving suppliers pricing leverage.

**Industry Rivalry:** High. Intense competition prevails among giants like Heraeus, Tosoh, and Shin-Etsu, with Chinese firms like Jiangsu Pacific Quartz scaling up to challenge market leaders.

## Market Opportunities and Challenges

### Opportunities

The photovoltaic industry's rapid expansion, with installations projected to hit 540 GW by 2028, drives demand for high-purity quartz crucibles and components, especially for N-type monocrystalline silicon.

Semiconductor growth, spurred by AI, HPC, and automotive applications, creates new avenues for ultra-pure quartz in wafer processing.

The rollout of 400G networks and FTTR technology boosts demand for quartz in optical fibers, supporting the digital economy's evolution.

Specialty lighting applications, such as UV disinfection and infrared heating, provide stable growth amid LED disruption.

### Challenges

High production costs and energy-intensive processes constrain scalability and profitability.

Industry consolidation, such as SCHOTT's acquisition of QSIL, heightens

competition and squeezes smaller players.

Supply chain risks, particularly for high-purity quartz sand, threaten production stability.

Competition from alternative materials in optics and semiconductors could erode market share in certain applications.

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