

# **Scratch Resistant Glass Market Forecasts to 2030 – Global Analysis By Product (Chemically Strengthened Glass, Sapphire Glass, Tempered Glass and Gorilla Glass), Application (Smartphones & Tablets, Interior Architecture, Electronics, Automotive and Other Applications) and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Scratch Resistant Glass Market is accounted for \$9.77 billion in 2024 and is expected to reach \$20.78 billion by 2030 growing at a CAGR of 13.4% during the forecast period. Scratch-resistant glass is a specially engineered material designed to withstand abrasions and surface damage, making it ideal for applications requiring durability and clarity. Advanced chemical coatings or treatments, like ion exchange processes, are commonly used in the manufacturing of this kind of glass to strengthen the surface and improve its scratch resistance. In applications where preserving a flawless appearance is crucial, such as smartphones, smart watches, automobile windshields, and architectural glazing, it is extensively utilized.

According to the International Data Corporation (IDC), the share of 5G smartphone shipments increased to 79% in 2024, up from 55% in 2023.

Market Dynamics:

Driver:

Growing consumer electronics demand

The need for scratch-resistant glass has increased dramatically due to the growing use of laptops, smartphones, tablets, and smart watches. Customers favor screens that are long-lasting, scratch-resistant, and retain their clarity and beauty even after normal wear and tear. To improve screen protection, businesses like Apple, Samsung, and Xiaomi are constantly incorporating cutting-edge glass technologies like ceramic-based glass and Corning Gorilla Glass. Furthermore, durable glass solutions are needed for gaming laptops and expensive monitors to avoid scratches from extended use. The demand for extremely durable glass materials keeps growing as consumer electronics advance with features like touch-sensitive surfaces and faster refresh rates.

#### Restraint:

##### High production costs and costly raw materials

The high cost of production is one of the main obstacles facing the scratch-resistant glass market, making it challenging for producers to provide affordable solutions. Creating scratch-resistant glass requires sophisticated manufacturing processes like chemical tempering, ion exchange strengthening, and nano-coating applications, all of which call for pricey tools and supplies. The high cost of raw materials such as chemically hardened glass, sapphire glass, and aluminosilicate glass raises production costs. Additionally, sapphire glass—which is renowned for its exceptional scratch resistance—is much costlier to manufacture than regular tempered or Gorilla Glass, which restricts its use in applications where cost is a concern.

#### Opportunity:

##### Growth in the windshield and display industry in the automobile sector

Scratch-resistant glass is being used more often by automakers for touch panels, infotainment systems, instrument clusters, and windshields in an effort to increase longevity. Digital displays have become an essential part of contemporary car interiors as connected and autonomous vehicles have grown in popularity. Over time, scratch-resistant glass preserves screen clarity, lowers glare, and increases visibility, making it a desirable option for automotive applications. Moreover, Gorilla Glass windshields and other cutting-edge glass technologies are being used in high-end luxury cars and electric vehicles (EVs) to improve durability and safety. In the automotive industry, the market for scratch-resistant glass is expected to grow significantly as long as automakers continue to invest in infotainment innovations and smart cockpit designs.

Threat:

### Competitors of alternative materials

Alternative materials that provide scratch resistance at a lower cost, like reinforced plastics, polycarbonate, and hybrid composites, are posing a serious threat to the market. For example, producers of consumer electronics, smartwatches, and automotive dashboards are investigating transparent covers made of polycarbonate, which are lighter than glass and offer impact resistance. Additionally, developments in the production of synthetic sapphire are producing an alternative to traditional scratch-resistant glass, especially in luxury watches and high-end consumer electronics.

### Covid-19 Impact:

The COVID-19 pandemic had a mixed effect on the market for scratch-resistant glass, causing supply chains to break down, manufacturing capacity to be reduced, and product launches to be delayed due to lockdowns and restrictions around the world. Furthermore, the market growth was negatively impacted by the decline in demand for key end-use industries, such as consumer electronics and automotive, due to decreased consumer spending and economic uncertainty, but the pandemic also accelerated digital transformation and remote work trends, increasing sales of smartphones, tablets, and laptops—all of which depend on scratch-resistant glass for durability—and increasing demand for antimicrobial and easily cleaned glass solutions in public spaces and healthcare.

The Chemically Strengthened Glass segment is expected to be the largest during the forecast period

The Chemically Strengthened Glass segment is expected to account for the largest market share during the forecast period. This dominance stems from its remarkable cost-effectiveness, high scratch resistance, and durability, which make it a popular option in a variety of industries. By substituting larger potassium ions for smaller sodium ions during the ion-exchange process used in its production, a compressive stress layer is created that greatly increases strength and resistance to mechanical damage. Moreover, chemically strengthened glass is widely used in consumer electronics, automotive displays, architectural glazing, and medical devices because it strikes a balance between cost and functionality.

The Smartphones & Tablets segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Smartphones & Tablets segment is predicted to witness the highest growth rate. The growing demand for high-performance mobile devices, growing digitalization, and rising disposable income are all contributing factors to this growth in the global adoption of smartphones and tablets. Because consumers value longevity and durability in their devices, manufacturers have incorporated cutting-edge scratch-resistant glass technologies, like Gorilla Glass and chemically strengthened glass, to improve screen protection. Additionally, the demand for incredibly thin and robust glass solutions has increased due to the trend toward foldable smartphones and bezel-less displays. Sales of smartphones are surging in emerging markets, especially in Asia-Pacific, which is driving up demand for scratch-resistant glass in this market.

Region with largest share:

During the forecast period, the North American region is expected to hold the largest market share, driven by robust demand from sectors like interior architecture, automotive, and consumer electronics. The demand for sophisticated scratch-resistant glass is fuelled by the region's high smartphone penetration rate as well as consumers' preference for high-end, long-lasting devices. Another important factor is the well-established automotive sector in the US and Canada, which is increasingly using scratch-resistant glass in digital dashboards, infotainment screens, and in-car entertainment systems. Furthermore, significant glass producers and technological pioneers based in North America are investing in R&D to improve the robustness and effectiveness of scratch-resistant materials.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rising consumer demand for high-durability products, urbanization, and rapid industrialization. Scratch-resistant glass is essential due to the region's booming consumer electronics industry, especially in China, India, South Korea, and Japan, where smartphone penetration is increasing and high-end devices are becoming more and more popular. Additionally, the rise in electric vehicles and connected car technologies has fuelled the automotive industry's expansion, which has increased the use of durable glass in instrument panels and infotainment systems.

Key players in the market

Some of the key players in Scratch Resistant Glass market include AGC Inc., Schott AG, Corning Incorporated, Guardian Industries Holdings, Saint-Gobain Inc, Murata Manufacturing Co., Ltd., Asahi Glass Co., Ltd., Kyocera Corporation, Fuyao Glass Inc, Crystalwise Technology Inc., Beijing Northglass Technologies Co. Ltd, Central Glass Co., Ltd, Nippon Electric Glass Co., Ltd., Sisecam Inc and Rubicon Technology Inc.

#### Key Developments:

In September 2024, AGC and MEDINET have signed a strategic partnership agreement in the cell therapy CDMO business. In recent years, as the development and introduction of new modalities\*2 such as gene and cell therapeutics has progressed worldwide, efforts to further improve Japan's drug discovery capabilities in this field have been discussed and promoted.

In August 2024, Corning Incorporated and Lumen have announced an agreement for a substantial supply of next-generation optical cable. The agreement reserves 10% of Corning's global fiber capacity for each of the next two years to interconnect AI-enabled data centers. This fiber-dense cable will more than double Lumen's U.S. intercity fiber miles, offering significant capacity to major cloud data centers racing to stay ahead of AI workloads and high bandwidth applications fuelled by massive amounts of data.

In April 2024, Saint-Gobain announces that it has entered into a definitive agreement for the acquisition of the Bailey Group Companies ("Bailey") – consisting of Bailey-Hunt Limited and its subsidiaries – a privately owned manufacturer of metal building solutions for light construction in Canada, for C\$880 million (approximately €600 million) in cash.

#### Products Covered:

Chemically Strengthened Glass

Sapphire Glass

Tempered Glass

Gorilla Glass

#### Applications Covered:

Smartphones & Tablets

Interior Architecture

Electronics

Automotive

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

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Brazil

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Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030

- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

#### Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

##### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

##### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

##### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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