

Silicon Nitride Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Type (RBSN, HPSN, SSN, Others), By Product Type (Cutting Tools, Bearings, Others By End User (Medical & Healthcare, Photovoltaic, Others), By Region and Competition

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Abstracts

Global Silicon Nitride Market has valued at USD120.45 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.41% through 2028. Silicon nitride is a remarkable ceramic material known for its distinctive mechanical and thermal properties. With its exceptional resistance to corrosion, abrasion, and various chemicals, silicon nitride has become highly sought-after in numerous industries including aerospace, automotive, and electronics. Its versatility and reliability have made it an integral component in industrial solutions.

In recent years, there has been a growing focus on reducing emissions, leading to an increased use of ceramic components in the development of medium and heavy-duty engines. This shift, coupled with the declining cost of silicon nitride, is expected to drive significant market growth in the future. An article published on LinkedIn in February 2019 highlighted the production of nearly 300,000 sintered silicon nitride turbochargers annually, emphasizing the material's significance in aerospace applications.

As environmental concerns continue to rise, there is a growing demand for more sustainable ceramic solutions. Embracing sustainable manufacturing practices for silicon nitride can help minimize its negative impact on the environment while creating new opportunities in the market. Moreover, advancements in biocompatible materials in the medical industry and the expanding electric vehicle market present additional

avenues for growth and innovation.

However, the availability of substitutes poses a potential challenge to the growth of the silicon nitride market. In order to overcome this, players in the market are actively pursuing strategic partnerships, engaging in mergers and acquisitions, and investing in research and development. For example, in October 2022, Denka Company Limited announced plans to increase silicon nitride production capacity by 1.5 times, positioning themselves as a prominent player in the field of environment and energy. Similarly, in November 2022, Kyocera developed a groundbreaking process for manufacturing micro-lasers measuring only 100 micrometers in length. This breakthrough not only lowers manufacturing costs but also simplifies the peeling process.

The COVID-19 pandemic had a significant impact on the silicon nitride market, with production and manufacturing activities being disrupted, leading to a decline in production and subsequent supply shortages worldwide. This resulted in increased prices for silicon nitride and created a demand for substitutes, potentially impeding the growth of the market. However, as the world recovers from the pandemic, the market is poised for a rebound with enhanced production capacity and renewed focus on innovation and sustainability.

Key Market Drivers

Growing Demand of Silicon Nitride in Healthcare Industry

Silicon nitride is a highly durable and thermally stable material with excellent resistance to wear and corrosion. These properties make it an ideal choice for various applications within the healthcare sector, especially in the field of orthopedics and dental implants.

When it comes to orthopedic implants, such as hip and knee replacements, the traditional materials like titanium and stainless steel have been widely used. However, recent advancements have led to the increased use of silicon nitride due to its superior biocompatibility and wear resistance. The use of silicon nitride implants has shown lower wear rates compared to traditional materials, significantly reducing the risk of implant loosening and failure. Moreover, the antibacterial properties of silicon nitride can effectively decrease the risk of post-surgical infections.

In the field of dentistry, silicon nitride is also being utilized for dental implants. The material's high strength and fracture toughness, combined with its excellent biocompatibility, make it a suitable choice for this application. Silicon nitride implants

have been found to exhibit excellent osseointegration, leading to successful long-term outcomes.

Considering the growing elderly population worldwide and the subsequent rise in orthopedic and dental procedures, the demand for silicon nitride in the healthcare sector is expected to continue to increase. Furthermore, ongoing research and development activities are likely to uncover new and innovative applications for silicon nitride within the medical field, further propelling the growth of the market.

In conclusion, the growing demand for silicon nitride in the healthcare industry is a significant driver of the global silicon nitride market. As this material continues to prove its worth in various medical applications, its market is poised to experience substantial expansion in the coming years, driven by advancements in technology and increasing awareness of its benefits.

Growing Demand of Silicon Nitride in Automotive Industry

Silicon nitride is a high-performance ceramic material known for its exceptional thermal stability, wear resistance, and mechanical strength. These outstanding attributes make it an ideal choice for a wide range of automotive applications, especially in critical engine components and high-temperature sensors.

Silicon nitride's remarkable thermal and mechanical properties make it a preferred material for manufacturing engine parts that are subjected to extreme conditions. Its ability to withstand high temperatures and resist wear and corrosion makes it perfect for components like valves, tappets, and turbocharger rotors, ensuring reliable and efficient engine performance.

One of the significant advantages of using silicon nitride components in engines is their ability to operate at higher temperatures compared to their metal counterparts. This capability not only boosts engine efficiency and performance but also contributes to enhanced fuel economy and reduced emissions. The lighter weight of silicon nitride parts further aids in improving overall vehicle fuel efficiency, aligning with the automotive industry's push towards sustainability and environmental consciousness.

In addition to engine components, silicon nitride is increasingly being utilized in the production of high-temperature sensors for automotive exhaust systems. These sensors play a crucial role in monitoring exhaust gas temperatures, enabling precise control of emissions and ensuring optimal engine performance. With stringent emission

regulations in place globally, the demand for high-temperature sensors made from silicon nitride is expected to witness significant growth, further driving the expansion of the silicon nitride market.

Looking towards the future of the automotive industry, the focus is on electrification and hybrid technology, where silicon nitride's exceptional properties can be fully leveraged. For instance, its excellent electrical insulating properties make it highly suitable for use in electric vehicle (EV) power electronics, ensuring efficient and reliable performance.

Furthermore, ongoing research and development activities are continuously uncovering new and innovative applications for silicon nitride within the automotive sector. This constant exploration and discovery of novel uses further propel the growth of the silicon nitride market, ensuring its sustained expansion in the years to come.

In conclusion, the increasing demand for silicon nitride in the automotive industry is a significant driving force behind the global silicon nitride market. As this exceptional material continues to demonstrate its value and versatility in various automotive applications, its market is poised for substantial growth and advancement in the foreseeable future.

Key Market Challenges

Limited Availability of Raw Materials

Silicon nitride, a highly versatile material, is synthesized from raw materials such as silica sand and nitrogen compounds. The quality and availability of these raw materials play a crucial role in determining the properties and overall success of the final silicon nitride product.

Ensuring a steady supply of high-quality raw materials is of paramount importance for the sustained growth and development of the silicon nitride market. However, the limited availability of these raw materials presents a significant challenge on a global scale. This multifaceted issue encompasses various factors, including geographical distribution, extraction difficulties, and environmental concerns.

Silica sand, a primary raw material used in the production of silicon nitride, is not evenly distributed worldwide. Certain regions possess abundant reserves, while others face scarcity. This uneven distribution can lead to disruptions in the supply chain, ultimately affecting the production capacity of silicon nitride.

The extraction of silica sand itself can be challenging due to a variety of factors. Environmental regulations, aimed at mitigating the negative impacts of extraction, along with technical difficulties, can hinder the extraction process and limit the availability of this essential raw material.

Moreover, the extraction and processing of silica sand can have significant environmental implications. These activities can disrupt natural habitats and contribute to water pollution, among other concerns. In response to these environmental challenges, stricter regulations have been implemented, further restricting the availability of raw materials for silicon nitride production.

By addressing these complex issues surrounding the availability and quality of raw materials, the silicon nitride industry can enhance its sustainability, promote responsible sourcing practices, and ensure the long-term viability of this versatile material.

Key Market Trends

Advancements in Ceramic Matrix Composites

Ceramic Matrix Composites (CMCs) are advanced materials that consist of a ceramic matrix combined with a ceramic or metal reinforcement. These composites are widely recognized for their exceptional properties, including high-temperature stability, light weight, and superior strength. As a result, they have found extensive use in various industrial applications where performance and reliability are paramount.

Among the different types of CMCs, silicon nitride-based composites have emerged as strong contenders for structural applications, particularly in cutting tools. This is due to their outstanding thermal and mechanical properties, which enable them to withstand high temperatures and demanding operating conditions.

In recent years, there have been significant advancements in CMC technology, leading to a broader range of applications across various sectors. One notable area is the automotive industry, where there is a growing demand for lightweight materials with exceptional strength. This demand has spurred the development and utilization of silicon nitride-based CMCs, as they offer a compelling solution to meet the industry's requirements.

Moreover, there is an increasing emphasis on sustainable and eco-friendly materials in

today's world. In this context, CMCs have garnered significant attention and adoption due to their inherent environmental benefits. Silicon nitride, in particular, stands out with its superior properties and potential for recycling, aligning perfectly with the current trend towards sustainability.

In conclusion, the advancements in ceramic matrix composites, particularly silicon nitride-based CMCs, are shaping the global silicon nitride market. As these composites continue to evolve and find new applications, the demand for silicon nitride is expected to rise, driving the expansion of the market in the coming years. This presents exciting opportunities for further research and innovation in the field of CMCs, as well as the overall growth of the materials industry.

Segmental Insights

Type Insights

Based on the category of type, the SSN segment emerged as the dominant player in the global market for silicon nitride. Sintered silicon nitride, a high-performance material, is formed by sintering powder compacts in a bed of silicon nitride powder under a high-pressure nitrogen atmosphere. To enhance its properties, additives like magnesium oxide and yttrium oxide are incorporated. With its exceptional thermal shock resistance, wear resistance, and high-temperature strength, sintered silicon nitride finds extensive use in various market applications. These include reciprocating engine components, turbochargers, bearings, metal cutting and shaping tools, and hot metal handling.

In contrast, reaction bonded silicon nitride is made by direct nitridation, which presents challenges in ensuring a complete reaction. Due to this, reaction bonded silicon nitride exhibits a lower density compared to sintered silicon nitride. Another variant, hot pressed silicon nitride, is produced through the hot pressing of silicon nitride, resulting in a material with virtually zero porosity.

Application Insights

The Others segment is projected to experience rapid growth during the forecast period. The largest market for silicon nitrides is in reciprocating engines like diesel and spark-ignited engines, where it is extensively used for combustion and wear parts. These advanced ceramic materials play a crucial role in reducing wear and increasing the efficiency of various engine functions, such as minimizing engine lag and facilitating faster start-up.

According to the Organisation Internationale des Constructeurs d'Automobiles (OICA), the total vehicle production in 2021 reached a staggering value of 57.3 million units, showcasing a remarkable growth of 8.9% compared to the production numbers of 2020. This substantial increase in vehicle production has directly contributed to the rising demand for automotive components, including silicon nitride. As a result, the Silicon Nitride Market is expected to witness significant growth within the forecast period, driven by the expanding automotive industry and its continuous pursuit of innovation and efficiency.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Silicon Nitride Market in 2022, holding the largest market share in terms of value.

The increasing demand for the automotive sector and energy sector in the Asia-Pacific region is primarily being led by China, India, South Korea, and Japan. According to the Organisation Internationale des Constructeurs d'Automobiles (OICA), the Asia-Pacific region had the largest production of motor vehicles in the year 2020, with a total production value of 44.3 million vehicles. China alone contributed about 32% of the global motor vehicle production in 2020, with a production value of 25.3 million units. Japan followed with a production of 8.1 million units, and South Korea with 3.5 million units in 2020.

Moreover, according to British Petroleum (BP), the Asia-Pacific region accounted for 45.5% of the global energy consumption in 2020, equivalent to 253.7 exajoules. This highlights the significant role played by the region in meeting the world's energy needs. As a result, the demand for the Silicon Nitride Market, an important component for these end-use industries, is expected to witness substantial growth in the Asia-Pacific region within the forecast period.

Key Market Players

Ube Industries Ltd

Denka Company Limited

H.C. Starck GmbH

Ceramtec Gmbh

Kyocera Corporation

Development Co Ltd

3m Company

Coorstek Inc

Toshiba Materials Co Ltd

Morgan Advanced Materials PLC

Report Scope:

In this report, the Global Silicon Nitride Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Silicon Nitride Market, By Type:

RBSN

HPSN

SSN

Others

Silicon Nitride Market, By Product Type:

Cutting Tools

Bearings

Others

Silicon Nitride Market, By End User:

Medical & Healthcare

Photovoltaic

Others

Silicon Nitride Market By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Silicon Nitride Market.

Available Customizations:

Global Silicon Nitride Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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