

Global Electronic Glass Fabrics Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Electronic Glass Fabrics competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Electronic Glass Fabrics generally refer to woven fabrics made from electronic-grade, alkali-free glass fibers such as E-glass, NE-glass, T-glass, L-glass or even quartz fibers, which are produced by melting and fiberizing glass, twisting the filaments into yarns, weaving them into cloth, and then desizing and finishing the fabrics; they function as the mechanical backbone and dielectric carrier in copper-clad laminates (CCL), printed circuit boards (PCB) and IC package substrates (FC-BGA cores). Nittobo, in its electronic materials business description, explicitly defines glass cloth as a material used to manufacture printed wiring boards for computers, communications devices and switchboards, highlighting its role as the reinforcing layer of PCB substrates. In terms of product types, standard E-glass electronic fabrics (styles such as 7628, 2116, 1080) remain the workhorse for FR-4 and general multilayer boards, differentiated by basis weight and thickness; ultra-thin/high-flatness fabrics (e.g. 1037, 1027, 1017) with thicknesses down in the 10-20 μ m range and filament diameters around 4-6 μ m are used in HDI, IC substrates and very high-layer-count fine-line PCBs, where flatness, low porosity and minimal glass-weave effect are critical; low-dielectric/low-loss fabrics (Low-Dk/Df) are achieved by modifying glass composition (NE-glass, L-glass etc.), reducing alkaline earth oxides such as CaO/MgO to lower the intrinsic dielectric constant and loss tangent of the glass. ResearchAndMarkets, for example, lists D-glass, E-glass, L-glass, NE-glass and S-glass as the main glass types in the Low-Dk/Df electronic glass cloth market, with applications in PCB substrates, HDI, microelectronic packaging and RF devices. For advanced packaging and IC substrates there are also low-CTE, high-modulus fabrics such as T-glass, which provide

lower in-plane CTE and higher stiffness to reduce package warpage and solder fatigue; Panasonic's low-CTE glass cloth-based substrate materials specify an in-plane CTE of 4 ± 6 ppm/ $^{\circ}\text{C}$ and explicitly highlight "low CTE glass cloth" as the enabler of low-warpage IC packages. In addition, special-purpose fabrics (quartz, S-glass, 3D fabrics) serve radar radomes, mmWave antennas and high-temperature electronics. Overall, Electronic Glass Fabrics have evolved from standard E-glass fabrics supporting FR-4 to a family of standard, ultra-thin, low-Dk/Df, low-CTE and quartz/specialty fabrics, with applications not only in smartphones, PCs, servers and automotive PCBs but also in package substrates for CPUs/GPUs/AI accelerators, high-speed backplanes and 5G base-station boards, as well as motor and transformer insulation and other electrical components. Nan Ya Plastics, for instance, describes its Electronic Glass Fabrics "featuring high spreading, low hollow fiber content and excellent CAF resistance" as being widely applied to IC substrates, HDI and MLB materials for IC packages, automotive, communications, mobile phones, notebooks and consumer electronics, while HSLG and other vendors emphasize their use as reinforcement, electrical insulation, thermal insulation and circuit substrate materials, underscoring that electronic glass fabrics are effectively the "rebar and skeleton" of electronic laminates. From an industry perspective, Electronic Glass Fabrics have shifted from being "bulk E-glass cloth for FR-4 PCBs" to a multi-tiered material system encompassing standard, ultra-thin, low-Dk/Df and low-CTE fabrics, with overall volume growing steadily and the mix upgrading rapidly at the high end. Technologically, the first major trend is high-frequency/high-speed signaling: hyperscale data centers, AI servers and 5G infrastructure are rapidly adopting 25G/56G/112G SerDes and 800G/1.6T switches, which, together with low-loss resins, demand ever lower Dk/Df from the glass fabric; NE-glass, L-glass and other low-dielectric glass types are moving from high-end routers and server backplanes into broader PCB and substrate applications, and are widely cited in technical articles as one of the key "material codes" for stable high-speed SerDes performance. The second trend is thinner, flatter and more dimensionally stable fabrics: high-layer-count HDI and ABF substrates require 1037/1027/1017-type ultra-thin fabrics with spread-glass constructions to minimize voids and glass-weave effects, improving drilling performance and impedance uniformity; Nan Ya's explicit segmentation of its product line into standard, ultra thin, low dielectric and low CTE cloth is a clear signal of this "thinning + functionalization" direction. The third is low-CTE/high-modulus and package-level co-optimization: as large FC-BGA, CoWoS and HBM packages proliferate, substrate CTE, warpage and solder fatigue emerge as system-level reliability bottlenecks, and low-CTE, high-modulus fabrics such as T-glass are increasingly viewed as "bottleneck materials for AI-server-class package substrates"; Nittobo's technical disclosures highlight NE-glass as the de facto industry standard for low-dielectric glass, while its special glass cloths (NE/T-glass) are positioned as

essential for low-loss, high-reliability boards and substrates in the 5G era. On the demand side, beyond AI and 5G communications, automotive electronics/EVs, industrial control and power electronics are long-term structural drivers, as they require both high-frequency performance and high insulation, temperature resistance and dimensional stability. At the same time, ESG and regulatory pressures are pushing furnace-efficiency improvements, energy savings and lead-free/eco-friendly formulations; the Low-Dk/Df electronic glass cloth market report, for example, explicitly mentions advances in lead-free manufacturing, RoHS-compliant glass cloth solutions, and bio-based/recycled glass fiber composites as emerging trends. In summary, within the broader fiberglass textile market, electronic-grade and Low-Dk/Df fabrics account for a minority of tonnage but carry higher prices and much higher technical barriers, and with sustained build-out in AI servers, high-speed networking, IC substrates and automotive electronics, this sub-segment is expected to remain structurally tight and grow at a mid-to-high single-digit or better CAGR over the coming decade. The competitive landscape of Electronic Glass Fabrics exhibits a dual structure: at the broad fiberglass-fabric level, capacity is widespread across Europe, the US, Japan, Taiwan and China, with relatively fragmented competition, whereas in the electronic-grade, especially Low-Dk/Df and low-CTE ultra-thin cloth niche, the market is effectively an oligopoly dominated by a small set of Japanese, Taiwanese, US and Chinese players. Nittobo (Nitto Boseki) stands out as a technological leader: its NE-glass, developed in the 1990s, has become the de facto standard low-dielectric glass product in the industry, and T-glass targets IC package substrates in smartphones and high-performance servers that require low CTE and low warpage; the company has invested roughly JPY 5 billion to expand special glass cloth capacity (NE/T-glass) for the 5G era and built new special glass cloth lines, while recent news reports note that its price hikes on composite materials deliberately exclude electronic-grade glass fabrics used in IC substrates for AI servers, underscoring the strategic nature and tightness of this product line. Taiwan Glass (TGI), including its Kunshan Taijia base in mainland China, is a major global supplier of electronic glass fabrics, providing standard 7628/2116/1080 cloth as well as low-Dk/low-CTE ultra-thin fabrics; multiple industry and market reports group Taiwan Glass together with Nittobo and Nan Ya as key suppliers to ABF substrates and AI-GPU package substrates. Nan Ya Plastics integrates electronic glass fabrics, CCL and copper foil, and offers a full portfolio of standard, ultra-thin, low dielectric and low-CTE cloth, explicitly targeting IC substrates, HDI and MLB as core applications. In Europe and North America, AGY, BGF Industries and Saint-Gobain/Vetrotex are key suppliers of high-performance and low-dielectric glass fibers and fabrics; AGY's low-dielectric glass fibers are used in high-frequency PCBs, backplanes and RF components, while Vetrotex and BGF serve aerospace, industrial composites and electronic structures. The value chain of Electronic Glass Fabrics can

be decomposed into raw materials and energy ? glass fibers and yarns ? electronic glass fabrics ? CCL/IC-substrate materials ? PCB/IC substrates ? electronic systems. ? Upstream, high-purity silica sand, limestone, boric acid and other glass-forming chemicals, together with natural gas and electricity, are melted in pool furnaces or bushings to produce glass fibers, often with tight control over filament diameter (typically 4-9 μm and even finer for ultra-thin fabrics) and composition (for Low-Dk/Df and low-CTE grades); the fibers are coated with sizings tailored for specific resin systems and then twisted into electronic-grade yarns. In the midstream, these yarns are woven on high-speed looms into plain, twill or multiaxial fabrics and then desized, heat-treated and surface-finished (often with silane coupling agents) to achieve the required flatness, loss-on-ignition, wet-out behavior and dielectric properties; this fabric-making stage is where the differentiation between commodity electronic fabrics and Low-Dk/low-CTE ultra-thin fabrics arises, and is where companies such as Nittobo, Nan Ya, Taiwan Glass, Grace, Taishan and Henan Guangyuan concentrate most of their proprietary know-how. Downstream on one side, CCL and IC-substrate material suppliers impregnate these fabrics with epoxy, BT, ABF or other low-polarity resins and laminate them with copper foils (including HVLP and low-CTE foils) to create high-speed CCL, IC-substrate cores and build-up dielectrics; Panasonic's low-CTE glass cloth-based laminates (e.g. R-G515 series) are a concrete example, combining low-CTE glass cloth with resin to deliver ultra-thin, low-warpage IC substrate materials. On the other side, PCB and IC-substrate manufacturers such as Unimicron, Nan Ya PCB, Ibiden and Shinko process these materials into multilayer PCBs and FC-BGA/FC-CSP substrates, which are then assembled and tested by OSATs and IDMs and finally integrated into servers, GPU accelerators, networking gear, 5G base stations, smartphones and automotive ECUs. The key bottleneck in this chain lies in the midstream electronic glass fabric—particularly Low-Dk/low-CTE ultra-thin cloth—where capex and ramp-up cycles are long and process windows are narrow, leading to concentrated supply and recurring episodes of tightness; this is evident in the fact that Nittobo's recent composite-material price hikes explicitly excluded electronic-grade glass fabrics for AI-server IC substrates and that CICC highlights new special-cloth investments by Sinoma and others as critical to meeting accelerating demand from AI servers and high-speed networking. As additional special-glass-cloth projects in Japan, Taiwan and China ramp in the latter half of the 2020s, high-end electronic glass fabric supply constraints may ease somewhat, but qualification cycles and reliability requirements at top-tier customers mean that the midstream fabric producers will likely remain a strategic choke point and a key margin pool within the broader fiberglass ecosystem.

The global Electronic Glass Fabrics market size was estimated at USD 4636.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.70%

during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Electronic Glass Fabrics market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Electronic Glass Fabrics market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Electronic Glass Fabrics market.

Global Electronic Glass Fabrics Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Nittobo (Nitto Boseki)
Taiwan Glass
AGY
Asahi Kasei
Panasonic
NAN-YA Glass Fabrics
Grace Fabric Technology
Baotek Industrial Materials
Fulltech Fiber Glass Corporation
Henan Guangyuan new material
Sinoma Science & Technology

Market Segmentation (by Type)

Low-CTE Glass Cloth
Low-Dk / Low-Df Glass Cloth
E-glass
Ultra thin cloth
Others

Market Segmentation (by Application)

IC Substrate
PCB/CCL
Others

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance

Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Electronic Glass Fabrics Market
Overview of the regional outlook of the Electronic Glass Fabrics Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Electronic Glass Fabrics Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application,

covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Electronic Glass Fabrics, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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