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Global Glass Cloth for IC Substrate 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 Glass Cloth for IC Substrate competitive dynamics, regional economic interdependencies, and supply chain reconfigurations.Fiberglass fabrics used in IC substrates (IC package substrates / FC-BGA cores) are ultra-thin, highly uniform electronic glass cloths woven from electronic-grade glass yarns such as E-glass, NE-glass, T-glass, L-glass or even quartz fibers, and they serve as both the mechanical backbone and dielectric/CTE-tuning component of ABF/BT resin systems in advanced package substrates. Conventional E-glass fabrics still dominate FR-4 and general HDI PCBs, but IC-substrate-grade materials fall into several distinct categories: (i) low-dielectric (Low-Dk/Low-Df) electronic glass cloths, exemplified by Nittobo?s NE-glass and AGY?s L-Glass, which modify the glass composition (lower CaO/MgO, tailored network modifiers) to significantly reduce dielectric constant and loss tangent and are now widely used in high-speed PCBs and IC packaging to improve signal integrity; (ii) low-CTE electronic glass cloths such as T-glass, featuring high elastic modulus and low coefficient of thermal expansion, which Nittobo, Taiwan Glass and Baotek specifically target at large FC-BGA substrates for CPUs/GPUs/AI accelerators and advanced package substrates in order to minimize CTE mismatch, warpage and solder fatigue; (iii) functional ultra-thin and high-spread fabrics (e.g., 1037/1027/1017 styles), which use finer fibers and spreading techniques to lower void content and reduce fiber-weave-induced skew, thereby improving flatness, dimensional stability and CAF resistance in very high-layer-count substrates?Nan Ya, Grace and other suppliers explicitly highlight high spreading, low hollow fiber and CAF resistance in products positioned for IC substrates, HDI and high-end MLBs; and (iv) emerging quartz or hybrid glass fabrics that push Df even lower and tune CTE more precisely for 112G/224G SerDes, CoWoS/2.5D packages and future glass-core

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substrates. Together with ABF/BT and other advanced resins, these fiberglass fabrics define the dielectric constant/loss, CTE, warpage behavior and reliability of IC substrates and are extensively used in package substrates for CPUs, GPUs, AI accelerators, network switches/routers, SerDes PHYs and HBM stacks, with spill-over into high-speed backplanes, 5G RF boards and high-frequency automotive and industrial electronics.From an industry standpoint, fiberglass fabrics for IC substrates have evolved from generic E-glass electronic cloths into a specialized sub-segment centered on low dielectric properties, low CTE and extreme thinness. Growth is driven by three structural vectors: first, the surge of AI servers, GPU clusters and advanced packaging (CoWoS, HBM, multi-chip FC-BGA) is pushing IC substrates to larger sizes, higher layer counts and more high-speed channels, turning T-glass-type low-CTE, high-modulus cloth into a critical bottleneck material?industry reports note that only Nittobo, Taiwan Glass and Taishan Fiberglass can stably mass-produce low-CTE fiberglass fabric for high-end IC substrates, resulting in a highly concentrated and tight supply; second, 5G infrastructure and data-center switches/routers migrating to 25?112G SerDes make low-Dk/Df fabrics and spread-glass construction a baseline requirement for high-speed CCL and substrates, with materials vendors and PCB houses consistently identifying low Dk/Df as the central trend in next-generation PCB/substrate materials; third, automotive electronics, EV power modules and mission-critical industrial/military systems increase demand for dimensionally stable, low-CTE, CAF-resistant and high-temperature electronic fabrics. Looking ahead, material systems are shifting from E-glass to NE-glass, L-glass, T-glass and eventually quartz-based fibers, often combined with halogen-free, low-polarity resins to further lower Dk/Df for 100G/200G-class signaling; at the same time, fiber diameters and fabric thickness keep shrinking (down toward 3?4 ?m fibers and 5?10 ?m ultra-thin fabrics), with high-spread, low-void constructions used to mitigate fiber-weave effects and enhance stack-up flatness and reliability, while hybrid glass?quartz and glass-core panel technologies blur the boundary between ?glass fabric reinforced organics? and ?glass substrates? in heterogeneous integration. Overall, AI, 5G and automotive electronics will continue to drive high-speed and high-reliability requirements, underpinning robust mid-to-long-term demand for IC-substrate-grade fiberglass fabrics, while long investment cycles and stringent quality barriers mean the segment is likely to remain a seller?s market for several years.Competitively, the market for IC-substrate-grade fiberglass fabrics?especially low-Dk, low-CTE and ultra-thin constructions?is highly concentrated among a handful of Japanese, Taiwanese, US and Chinese players, forming a ?global oligopoly + regional champions + emerging domestic challengers? structure: on the global low-dielectric glass fiber front, key players include Nittobo, Taishan Fiberglass, AGY, Taiwan Glass and Fulltech Fiber Glass, with the top five accounting for a large share of the market; Nittobo leads with its NE-glass (the de-facto standard low-Dk

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glass) and T-glass (high-elasticity, low-CTE glass described in its integrated reports as essential to semiconductor package substrates) and continues to invest in new special glass cloth capacity for 5G/AI applications, while Taiwan Glass and Baotek cooperate closely with IC-substrate material makers via T-glass/NE-glass tech-transfer and are widely cited as core suppliers for ABF/FC-BGA substrates used in Nvidia-class GPUs. AGY, through its L-Glass and L-HDI product lines, provides low-Dk/Df, low-CTE fibers targeted at high-frequency PCBs, backplanes, AI-infrastructure boards and IC packaging, and is a key supplier in North American and European high-end markets. In Taiwan, besides Taiwan Glass, Nan Ya Plastics, Baotek, Fulltech and PFG offer electronic glass fabrics, with Nan Ya explicitly positioning its high-spread, low-void, CAF-resistant fabrics for IC substrates, HDI and MLBs. In mainland China, Grace Fabric Technology (603256.SH) focuses on mid-to-high-end electronic-grade fiberglass cloth and classifies its products into low-Dk/Df, low-CTE, high anti-CAF and high-dimension-stability categories, explicitly citing advanced IC packaging and fast-signal-transmission boards as target applications; recent technical and financial coverage notes that Grace has developed 5-?m-class ultra-thin fabrics adopted in high-end electronics including game consoles and smartphones. Brokerage and industry reports further highlight Linzhou Guangyuan, Taishan Fiberglass and Sinoma-backed projects as mainstream domestic suppliers of low-dielectric electronic glass cloth, with new first-generation and second-generation Low-Dk lines under construction and special glass cloth projects of tens of millions of meters per year being announced, all aiming at import substitution against NE-glass/T-glass-class materials. Overall, Japanese and Taiwanese suppliers still dominate the highest-end IC-substrate fabric segment in terms of technology and margins, US players like AGY lead in specialty low-loss fibers for high-frequency and AI infrastructure, while Chinese manufacturers already hold scale advantages in general-purpose electronic fabrics and are rapidly closing the gap in Low-Dk, Low-CTE and ultra-thin fabrics to penetrate global IC-substrate and high-speed PCB supply chains.In the value chain, IC-substrate fiberglass fabrics sit in the middle of a long sequence that runs ?raw materials ? electronic glass yarn ? electronic fabrics ? CCL/IC-substrate materials ? substrate fabs ? OSAT/IDM and system OEMs?: upstream are high-purity silica, alumina, boron oxide and other glass-forming chemicals plus energy (natural gas/electricity), followed by electronic-grade fiber production via pool-furnace or bushing melting and drawing, where fiber diameter (typically 3?6 ?m, even finer for ultra-thin fabrics) and sizing chemistry are tightly controlled to support Low-Dk, Low-CTE and ultra-thin fabric performance; this yarn is then woven, spread, desized and surface-treated in electronic-cloth plants to produce a range of fabric styles from traditional 7628/2116 to ultra-thin 1037/1027/1017 grades, with high strength, heat resistance, flame retardance and electrical insulation specifically tuned for PCBs and IC substrates. These fabrics then flow to CCL and IC-substrate material makers, who impregnate them

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with epoxy, BT, ABF or other low-polarity resin systems and laminate with copper foils (including HVLP and low-CTE foils) to create high-speed CCL, core materials and build-up dielectrics tailored for FC-BGA and IC-substrate applications; downstream, IC-substrate manufacturers such as Ibiden, Shinko, Unimicron, Nan Ya PCB and numerous Taiwanese/Chinese substrate houses convert these materials into package substrates for CPUs, GPUs, AI accelerators, SerDes, HBM and mobile SoCs, which are then assembled and tested by OSATs and IDMs before entering servers, GPU accelerator cards, networking gear, 5G base stations, smartphones and automotive The primary bottleneck in this chain lies in the midstream fabric segment?particularly Low-Dk, Low-CTE and ultra-thin cloth?where capacity expansion requires large capex, long ramp-up times and stringent process control, so high-end suppliers like Nittobo, Taiwan Glass, Taishan and Grace wield significant influence over ABF/BT substrate and high-end PCB supply security and pricing; in response, Japan, Taiwan and China are all investing aggressively in special glass cloth capacity (e.g., Baotek?s T-glass/NE-glass tech-transfer projects, Sinoma and China Jushi?s special electronic cloth projects, and multiple Chinese Low-Dk lines), aiming to localize supply and mitigate material risks as AI, 5G and EV demand drives an unprecedented build-out of high-performance package substrates and glass-reinforced electronics.

The global Glass Cloth for IC Substrate market size was estimated at USD 551.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.80% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Glass Cloth for IC Substrate 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 Glass Cloth for IC Substrate 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.

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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 Glass Cloth for IC Substrate market.

Global Glass Cloth for IC Substrate 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
Quartz Q-glass

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Market Segmentation (by Application)

ABF Substrate
BT Substrate

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 Glass Cloth for IC Substrate Market
Overview of the regional outlook of the Glass Cloth for IC Substrate Market:

Customization of the Report

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Chapter Outline

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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 Glass Cloth for IC Substrate 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 Glass Cloth for IC Substrate, 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.

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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

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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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Contents

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APPLICATION

8 GLASS CLOTH FOR IC SUBSTRATE MARKET SALES BY REGION

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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