

Global Third Generation LOW DK3 (Quartz Cloth) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Third Generation LOW DK3 (Quartz Cloth) market size was valued at US\$ 183 million in 2025 and is forecast to a readjusted size of US\$ 847 million by 2032 with a CAGR of 19.8% during review period.

Electronic cloth is a crucial reinforcing material for copper-clad laminates (CCLs). Its dielectric constant, along with the dielectric constant and dielectric loss properties of the resin, jointly determine the dielectric performance of the CCL. Electronic cloth is classified into three generations: first-generation (alkali-free glass fiber), second-generation (modified glass fiber), and third-generation (Q-cloth/quartz fiber cloth). Third-generation electronic cloth (Q-cloth) uses quartz fiber as its raw material. Traditional electronic cloth uses e-glass fiber, which has a dielectric constant of approximately 7 and a dielectric loss of approximately 6/1000 at 1 MHz. Modified glass fibers such as d, NE, and I have dielectric constants below 4-5 and dielectric losses reduced to 5/10000-6/10000. Quartz fiber, being high-purity silicon dioxide, has a dielectric constant of approximately 3.78 and a theoretical dielectric loss of up to 1/10000, significantly lower than glass fiber, resulting in superior dielectric performance. Driven by the demands for high-speed transmission and large capacity, specialty glass fibers are undergoing product upgrades, transitioning from traditional glass fiber to quartz fiber.

Third Generation Low DK3 (Quartz Cloth) is a high-performance electronic-grade quartz fiber fabric woven from high-purity quartz fibers, resulting in a uniform fabric surface. Its characteristics include ultra-low dielectric constant ($D_k \approx 3.0$), extremely low dielectric loss ($D_f \approx 0.001$), extremely low coefficient of thermal expansion ($CTE \approx 0.5 \text{ ppm/}^\circ\text{C}$), and

high dimensional stability. This type of quartz cloth is primarily used in high-frequency, high-speed electronic applications, such as copper-clad laminates (CCLs) for millimeter-wave/terahertz circuits, AI servers, and high-speed optical modules. It represents the latest generation of quartz cloth development, balancing ultra-low signal loss with industrial-scale production capabilities.

Production Capacity Layout:

2025: Feilihua Q-type fabric production capacity: 50,000 meters/month; Sinoma Science & Technology Q-type fabric production capacity: 15,000 meters/month

2026: Feilihua Q-type fabric production capacity target: 30 million square meters (approximately 3 million meters), certified by NVIDIA.

Global production of Third Generation Low DK3 (Quartz Cloth) is projected to reach 6.66 million meters in 2025, with an average selling price of \$15.49-\$38.02 per meter and a gross profit margin of approximately 45%.

Currently, chip manufacturers have carried out research on 224G high-speed interconnect technology. The 224G motherboard is mainly based on high-speed PCB, which has extremely high requirements for the dielectric loss of PCB materials. Data centers are one of the main application areas of 224G, involving servers, network routers, storage and other equipment, which require a large number of high-speed PCBs. In terms of performance comparison, under 10 GHz conditions, the dielectric constant of quartz fiber can be reduced to below 4, and the dielectric loss limit is $2/10000$, while the dielectric loss threshold of traditional glass fiber is $1/1000$. In the copper clad laminate grade standard (such as Panasonic's M5M9), the M9 standard requires a dielectric loss of less than $9/10000$, and it is necessary to break through the bottleneck of $1/1000$. Traditional glass fiber is limited, and the quartz fiber solution has become a clear direction.

The quartz fiber electronic cloth industry is on a rapid growth trajectory, with technological innovation and application expansion continuously driving market development. Fields such as 5G communication, AI, and high-performance computing have placed significantly higher demands on the dielectric properties of high-frequency and high-speed substrates. Quartz fiber electronic cloth, with its extremely low dielectric constant and excellent high-temperature stability, is becoming an important material to replace traditional glass fiber and organic substrates. The strong demand for high-reliability materials in aerospace and defense electronic systems, as well as the

standardized requirements for ultra-high purity materials in semiconductor manufacturing equipment, are among the main drivers of industry demand growth. Meanwhile, continuous technological breakthroughs by major global manufacturers in high-purity quartz fiber preparation, weaving precision, and surface treatment processes will further broaden downstream application boundaries and increase market penetration.

Despite the broad market prospects, the industry supply chain still faces significant challenges. High-purity quartz raw material resources are concentrated, and global supply is highly dependent on specific mining areas, leading to high volatility risks in raw material prices. Furthermore, large investments in production equipment, high technological barriers, and difficult equipment maintenance all limit the rapid expansion of new capacity. International trade barriers, intellectual property protection, and regulatory standards (such as REACH and IPC/MIL standards) also increase the uncertainty of cross-border market expansion. Prices remain high, and cost-sensitive application areas such as consumer electronics and low-to-mid-range industrial markets still face substitution threats, limiting the rapid expansion of the industry's overall scale.

Downstream demand is evolving towards high-end and customized products. With global semiconductor manufacturing capacity concentrating in the Asia-Pacific region, especially with the expansion of wafer fabs in China, Japan, and South Korea, the requirements for extremely low metal impurities and repeatable batch quality in electronic-grade quartz fiber cloth are becoming increasingly stringent. Furthermore, future radar systems, high-temperature gas turbine sensors, and next-generation satellite communication equipment will place higher demands on the heat resistance, radiation resistance, and electromagnetic transparency of materials. This will further increase the demand for quartz fiber electronic cloth in the high-end equipment manufacturing sector. Overall, downstream industry demand is trending towards more specialized niche markets with higher technological added value.

This report is a detailed and comprehensive analysis for global Third Generation LOW DK3 (Quartz Cloth) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Third Generation LOW DK3 (Quartz Cloth) market size and forecasts, in consumption value (\$ Million), sales quantity (K Meter), and average selling prices (US\$/Meter), 2021-2032

Global Third Generation LOW DK3 (Quartz Cloth) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Meter), and average selling prices (US\$/Meter), 2021-2032

Global Third Generation LOW DK3 (Quartz Cloth) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Meter), and average selling prices (US\$/Meter), 2021-2032

Global Third Generation LOW DK3 (Quartz Cloth) market shares of main players, shipments in revenue (\$ Million), sales quantity (K Meter), and ASP (US\$/Meter), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Third Generation LOW DK3 (Quartz Cloth)

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Third Generation LOW DK3 (Quartz Cloth) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Shin-Etsu Chemical Co., Ltd.?JP?, Saint-Gobain?FR?, Nittobo?JP?, Xcellent Composites?US?, Shaanxi Light Optoelectronics Material Co., Ltd.?CN?, Sinoma Science and Technology Co., Ltd.?CN?, Grace Fabric Technology Co., Ltd.?CN?, Hubei Feilihua Quartz Glass Co., Ltd.?CN?, Pamica Technology Corporation?CN?, Gansu Tianhong New Materials Co., Ltd.?CN?, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

Third Generation LOW DK3 (Quartz Cloth) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Fiber Diameter 10?m-28?m

Fiber Diameter Less Than 10?m

Market segment by Thickness

Ultra-Thin Quartz Fiber Cloth?? 0.1 mm?

Standard Quartz Fiber Cloth?0.1?0.3 mm?

Others

Market segment by Dielectric Loss

Ultra-Ultra Low?Df ? 0.0009?

Others?Df > 0.0009?

Market segment by Application

Data Center High-Speed ??PCBs

AI Server

5G/6G Base Station RF Modules

Semiconductor Packaging Substrate

Other

Major players covered

Shin-Etsu Chemical Co., Ltd.?JP?

Saint-Gobain?FR?

Nittobo?JP?

Xcellent Composites?US?

Shaanxi Light Optoelectronics Material Co., Ltd.?CN?

Sinoma Science and Technology Co., Ltd.?CN?

Grace Fabric Technology Co., Ltd.?CN?

Hubei Feilihua Quartz Glass Co., Ltd.?CN?

Pamica Technology Corporation?CN?

Gansu Tianhong New Materials Co., Ltd.?CN?

Yaoshitech?CN?

Henan Guangyuan New Material Co., Ltd.?CN?

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Third Generation LOW DK3 (Quartz Cloth) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Third Generation LOW DK3 (Quartz Cloth), with price, sales quantity, revenue, and global market share of Third Generation LOW DK3 (Quartz Cloth) from 2021 to 2026.

Chapter 3, the Third Generation LOW DK3 (Quartz Cloth) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Third Generation LOW DK3 (Quartz Cloth) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Third Generation LOW DK3 (Quartz Cloth) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Third

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Chapter 14 and 15, to describe Third Generation LOW DK3 (Quartz Cloth) sales channel, distributors, customers, research findings and conclusion.

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