

Global ABF Substrates for Server & HPC Market Growth 2026-2032

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Abstracts

The global ABF Substrates for Server & HPC market size is predicted to grow from US\$ 1265 million in 2025 to US\$ 3709 million in 2032; it is expected to grow at a CAGR of 16.9% from 2026 to 2032.

ABF (Ajinomoto Build-up Film) substrate (or FC BGA), a type of semiconductor substrate, connects high-integrated semiconductor chips and substrates using flip-chip bumps, enhancing electrical and thermal characteristics. It is mainly used in CPUs (Central Processing Units) and GPUs (Graphics Processing Units) for PCs, servers, networks, and automobiles.

Server ABF Substrates are the most technically challenging among semiconductor substrates, and only a few global companies are capable of mass production of high-end server substrates. Server CPUs and GPUs require multiple semiconductor chips to be installed on a single substrate to accommodate high performance such as improved processing power and signal speed. Therefore, server FCBGA substrates are more than four times the size of standard ABF Substrates for PCs and have more than twice the number of layers, exceeding 20 layers. As such, server ABF Substrates requires advanced manufacturing technology and dedicated facilities to enhance product reliability and production yield due to the large size of the substrate and high number of layers, making it a challenging field for new entrants.

Current the key players of Server ABF Substrates include Ibiden, Unimicron, Nan Ya PCB, Shinko Electric Industries, Kinsus Interconnect Technology, AT&S, and Samsung Electro-Mechanics, etc. Ibiden is the largest manufacturer of ABF substrate.

The server market for data centers is expected to expand thanks to the progress of

digitization, such as the spread of ICT, as well as the evolution of AI and the improvement of the level of autonomous driving. In addition to semiconductor front-end processes (IC chips), the importance and added value of the back-end processes (ABF substrates) are also increasing.

LP Information, Inc. (LPI) ' newest research report, the “ABF Substrates for Server & HPC Industry Forecast” looks at past sales and reviews total world ABF Substrates for Server & HPC sales in 2025, providing a comprehensive analysis by region and market sector of projected ABF Substrates for Server & HPC sales for 2026 through 2032. With ABF Substrates for Server & HPC sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world ABF Substrates for Server & HPC industry.

This Insight Report provides a comprehensive analysis of the global ABF Substrates for Server & HPC landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ABF Substrates for Server & HPC portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global ABF Substrates for Server & HPC market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ABF Substrates for Server & HPC and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ABF Substrates for Server & HPC.

This report presents a comprehensive overview, market shares, and growth opportunities of ABF Substrates for Server & HPC market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

8-16 Layers ABF Substrate

Above 16 Layers ABF Substrate

Segmentation by Application:

Data Centers

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Ibiden

Shinko Electric Industries

Unimicron

Nan Ya PCB

AT&S

Kinsus Interconnect Technology

Samsung Electro-Mechanics

Kyocera

Toppan

Zhen Ding Technology

LG InnoTek

Daeduck Electronics

Zhuhai Access Semiconductor

Shenzhen Fastprint Circuit Tech

Shennan Circuit

Key Questions Addressed in this Report

What is the 10-year outlook for the global ABF Substrates for Server & HPC market?

What factors are driving ABF Substrates for Server & HPC market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ABF Substrates for Server & HPC market opportunities vary by end market size?

How does ABF Substrates for Server & HPC break out by Type, by Application?

The report requires updating with new data and is sent in 48 hours after order is placed.

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