

Global Electronic Glass Fabrics for IC Package Substrate Market Growth 2026-2032

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Abstracts

The global Electronic Glass Fabrics for IC Package Substrate market size is predicted to grow from US\$ 584 million in 2025 to US\$ 936 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

Electronic Glass Fabrics used in IC package substrates 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 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, Electronic Glass Fabrics for IC package 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 μm fibers and 5–10 μm 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 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- μ 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 μ 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 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.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Electronic Glass Fabrics for IC Package Substrate 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 Electronic Glass Fabrics for IC Package Substrate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Electronic Glass Fabrics for IC Package Substrate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Electronic Glass Fabrics for IC Package Substrate and breaks down the forecast by Technology, 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 Electronic Glass Fabrics for IC Package Substrate.

This report presents a comprehensive overview, market shares, and growth opportunities of Electronic Glass Fabrics for IC Package Substrate market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Technology:

Low-CTE Glass Cloth

Low-Dk / Low-Df Glass Cloth

E-glass

Quartz Q-glass

Segmentation by Substrate Type:

FCBGA Substrate

FCCSP Substrate

WB-CSP/BGA

Segmentation by End Use:

PCs

Server/Data Center

AI/HPC Chips

Communication

Smart Phone

Wearable and Consumer Electronics

Automotive Electronics

Others

Segmentation by Application:

ABF Substrate

BT Substrate

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Electronic Glass Fabrics for IC Package Substrate market?

What factors are driving Electronic Glass Fabrics for IC Package Substrate market growth, globally and by region?

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

How do Electronic Glass Fabrics for IC Package Substrate market opportunities vary by end market size?

How does Electronic Glass Fabrics for IC Package Substrate break out by Technology, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Electronic Glass Fabrics for IC Package Substrate Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Electronic Glass Fabrics for IC Package Substrate by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Electronic Glass Fabrics for IC Package Substrate by Country/Region, 2021, 2025 & 2032
- 2.2 Electronic Glass Fabrics for IC Package Substrate Segment by Technology
 - 2.2.1 Low-CTE Glass Cloth
 - 2.2.2 Low-Dk / Low-Df Glass Cloth
 - 2.2.3 E-glass
 - 2.2.4 Quartz Q-glass
 - 2.2.5 Electronic Glass Fabrics for IC Package Substrate Sales by Technology
 - 2.2.5.1 Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)
 - 2.2.5.2 Global Electronic Glass Fabrics for IC Package Substrate Revenue and Market Share by Technology (2021-2026)
 - 2.2.5.3 Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Technology (2021-2026)
- 2.3 Electronic Glass Fabrics for IC Package Substrate Segment by Substrate Type
 - 2.3.1 FCBGA Substrate
 - 2.3.2 FCCSP Substrate
 - 2.3.3 WB-CSP/BGA
 - 2.3.4 Electronic Glass Fabrics for IC Package Substrate Sales by Substrate Type

2.3.4.1 Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Substrate Type (2021-2026)

2.3.4.2 Global Electronic Glass Fabrics for IC Package Substrate Revenue and Market Share by Substrate Type (2021-2026)

2.3.4.3 Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Substrate Type (2021-2026)

2.4 Electronic Glass Fabrics for IC Package Substrate Segment by End Use

2.4.1 PCs

2.4.2 Server/Data Center

2.4.3 AI/HPC Chips

2.4.4 Communication

2.4.5 Smart Phone

2.4.6 Wearable and Consumer Electronics

2.4.7 Automotive Electronics

2.4.8 Others

2.4.9 Electronic Glass Fabrics for IC Package Substrate Sales by End Use

2.4.9.1 Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by End Use (2021-2026)

2.4.9.2 Global Electronic Glass Fabrics for IC Package Substrate Revenue and Market Share by End Use (2021-2026)

2.4.9.3 Global Electronic Glass Fabrics for IC Package Substrate Sale Price by End Use (2021-2026)

2.5 Electronic Glass Fabrics for IC Package Substrate Segment by Application

2.5.1 ABF Substrate

2.5.2 BT Substrate

2.5.3 Electronic Glass Fabrics for IC Package Substrate Sales by Application

2.5.3.1 Global Electronic Glass Fabrics for IC Package Substrate Sale Market Share by Application (2021-2026)

2.5.3.2 Global Electronic Glass Fabrics for IC Package Substrate Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Electronic Glass Fabrics for IC Package Substrate Breakdown Data by Company

3.1.1 Global Electronic Glass Fabrics for IC Package Substrate Annual Sales by Company (2021-2026)

3.1.2 Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Company (2021-2026)

3.2 Global Electronic Glass Fabrics for IC Package Substrate Annual Revenue by Company (2021-2026)

3.2.1 Global Electronic Glass Fabrics for IC Package Substrate Revenue by Company (2021-2026)

3.2.2 Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Company (2021-2026)

3.3 Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Company

3.4 Key Manufacturers Electronic Glass Fabrics for IC Package Substrate Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Electronic Glass Fabrics for IC Package Substrate Product Location Distribution

3.4.2 Players Electronic Glass Fabrics for IC Package Substrate Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ELECTRONIC GLASS FABRICS FOR IC PACKAGE SUBSTRATE BY GEOGRAPHIC REGION

4.1 World Historic Electronic Glass Fabrics for IC Package Substrate Market Size by Geographic Region (2021-2026)

4.1.1 Global Electronic Glass Fabrics for IC Package Substrate Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Electronic Glass Fabrics for IC Package Substrate Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Electronic Glass Fabrics for IC Package Substrate Market Size by Country/Region (2021-2026)

4.2.1 Global Electronic Glass Fabrics for IC Package Substrate Annual Sales by Country/Region (2021-2026)

4.2.2 Global Electronic Glass Fabrics for IC Package Substrate Annual Revenue by Country/Region (2021-2026)

4.3 Americas Electronic Glass Fabrics for IC Package Substrate Sales Growth

4.4 APAC Electronic Glass Fabrics for IC Package Substrate Sales Growth

4.5 Europe Electronic Glass Fabrics for IC Package Substrate Sales Growth

4.6 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales

Growth

5 AMERICAS

5.1 Americas Electronic Glass Fabrics for IC Package Substrate Sales by Country

5.1.1 Americas Electronic Glass Fabrics for IC Package Substrate Sales by Country (2021-2026)

5.1.2 Americas Electronic Glass Fabrics for IC Package Substrate Revenue by Country (2021-2026)

5.2 Americas Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026)

5.3 Americas Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Electronic Glass Fabrics for IC Package Substrate Sales by Region

6.1.1 APAC Electronic Glass Fabrics for IC Package Substrate Sales by Region (2021-2026)

6.1.2 APAC Electronic Glass Fabrics for IC Package Substrate Revenue by Region (2021-2026)

6.2 APAC Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026)

6.3 APAC Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Electronic Glass Fabrics for IC Package Substrate by Country

7.1.1 Europe Electronic Glass Fabrics for IC Package Substrate Sales by Country (2021-2026)

7.1.2 Europe Electronic Glass Fabrics for IC Package Substrate Revenue by Country (2021-2026)

7.2 Europe Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026)

7.3 Europe Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate by Country

8.1.1 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Country (2021-2026)

8.1.2 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Revenue by Country (2021-2026)

8.2 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026)

8.3 Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Electronic Glass Fabrics for IC Package Substrate

10.3 Manufacturing Process Analysis of Electronic Glass Fabrics for IC Package Substrate

10.4 Industry Chain Structure of Electronic Glass Fabrics for IC Package Substrate

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Electronic Glass Fabrics for IC Package Substrate Distributors

11.3 Electronic Glass Fabrics for IC Package Substrate Customer

12 WORLD FORECAST REVIEW FOR ELECTRONIC GLASS FABRICS FOR IC PACKAGE SUBSTRATE BY GEOGRAPHIC REGION

12.1 Global Electronic Glass Fabrics for IC Package Substrate Market Size Forecast by Region

12.1.1 Global Electronic Glass Fabrics for IC Package Substrate Forecast by Region (2027-2032)

12.1.2 Global Electronic Glass Fabrics for IC Package Substrate Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Electronic Glass Fabrics for IC Package Substrate Forecast by Technology (2027-2032)

12.7 Global Electronic Glass Fabrics for IC Package Substrate Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Nittobo (Nitto Boseki)

13.1.1 Nittobo (Nitto Boseki) Company Information

13.1.2 Nittobo (Nitto Boseki) Electronic Glass Fabrics for IC Package Substrate

Product Portfolios and Specifications

13.1.3 Nittobo (Nitto Boseki) Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Nittobo (Nitto Boseki) Main Business Overview

13.1.5 Nittobo (Nitto Boseki) Latest Developments

13.2 Taiwan Glass

13.2.1 Taiwan Glass Company Information

13.2.2 Taiwan Glass Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

13.2.3 Taiwan Glass Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Taiwan Glass Main Business Overview

13.2.5 Taiwan Glass Latest Developments

13.3 AGY

13.3.1 AGY Company Information

13.3.2 AGY Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

13.3.3 AGY Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 AGY Main Business Overview

13.3.5 AGY Latest Developments

13.4 Asahi Kasei

13.4.1 Asahi Kasei Company Information

13.4.2 Asahi Kasei Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

13.4.3 Asahi Kasei Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Asahi Kasei Main Business Overview

13.4.5 Asahi Kasei Latest Developments

13.5 Panasonic

13.5.1 Panasonic Company Information

13.5.2 Panasonic Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

13.5.3 Panasonic Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Panasonic Main Business Overview

13.5.5 Panasonic Latest Developments

13.6 NAN-YA Glass Fabrics

13.6.1 NAN-YA Glass Fabrics Company Information

13.6.2 NAN-YA Glass Fabrics Electronic Glass Fabrics for IC Package Substrate
Product Portfolios and Specifications

13.6.3 NAN-YA Glass Fabrics Electronic Glass Fabrics for IC Package Substrate
Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 NAN-YA Glass Fabrics Main Business Overview

13.6.5 NAN-YA Glass Fabrics Latest Developments

13.7 Grace Fabric Technology

13.7.1 Grace Fabric Technology Company Information

13.7.2 Grace Fabric Technology Electronic Glass Fabrics for IC Package Substrate
Product Portfolios and Specifications

13.7.3 Grace Fabric Technology Electronic Glass Fabrics for IC Package Substrate
Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Grace Fabric Technology Main Business Overview

13.7.5 Grace Fabric Technology Latest Developments

13.8 Baotek Industrial Materials

13.8.1 Baotek Industrial Materials Company Information

13.8.2 Baotek Industrial Materials Electronic Glass Fabrics for IC Package Substrate
Product Portfolios and Specifications

13.8.3 Baotek Industrial Materials Electronic Glass Fabrics for IC Package Substrate
Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Baotek Industrial Materials Main Business Overview

13.8.5 Baotek Industrial Materials Latest Developments

13.9 Fulltech Fiber Glass Corporation

13.9.1 Fulltech Fiber Glass Corporation Company Information

13.9.2 Fulltech Fiber Glass Corporation Electronic Glass Fabrics for IC Package
Substrate Product Portfolios and Specifications

13.9.3 Fulltech Fiber Glass Corporation Electronic Glass Fabrics for IC Package
Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Fulltech Fiber Glass Corporation Main Business Overview

13.9.5 Fulltech Fiber Glass Corporation Latest Developments

13.10 Henan Guangyuan new material

13.10.1 Henan Guangyuan new material Company Information

13.10.2 Henan Guangyuan new material Electronic Glass Fabrics for IC Package
Substrate Product Portfolios and Specifications

13.10.3 Henan Guangyuan new material Electronic Glass Fabrics for IC Package
Substrate Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Henan Guangyuan new material Main Business Overview

13.10.5 Henan Guangyuan new material Latest Developments

13.11 Sinoma Science & Technology

- 13.11.1 Sinoma Science & Technology Company Information
- 13.11.2 Sinoma Science & Technology Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications
- 13.11.3 Sinoma Science & Technology Electronic Glass Fabrics for IC Package Substrate Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.11.4 Sinoma Science & Technology Main Business Overview
- 13.11.5 Sinoma Science & Technology Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Electronic Glass Fabrics for IC Package Substrate Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Electronic Glass Fabrics for IC Package Substrate Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Low-CTE Glass Cloth
- Table 4. Major Players of Low-Dk / Low-Df Glass Cloth
- Table 5. Major Players of E-glass
- Table 6. Major Players of Quartz Q-glass
- Table 7. Global Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026) & (K Sqm)
- Table 8. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)
- Table 9. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Technology (2021-2026) & (\$ million)
- Table 10. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Technology (2021-2026)
- Table 11. Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Technology (2021-2026) & (US\$/Sq m)
- Table 12. Major Players of FCBGA Substrate
- Table 13. Major Players of FCCSP Substrate
- Table 14. Major Players of WB-CSP/BGA
- Table 15. Global Electronic Glass Fabrics for IC Package Substrate Sales by Substrate Type (2021-2026) & (K Sqm)
- Table 16. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Substrate Type (2021-2026)
- Table 17. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Substrate Type (2021-2026) & (\$ million)
- Table 18. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Substrate Type (2021-2026)
- Table 19. Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Substrate Type (2021-2026) & (US\$/Sq m)
- Table 20. Major Players of PCs
- Table 21. Major Players of Server/Data Center
- Table 22. Major Players of AI/HPC Chips
- Table 23. Major Players of Communication

Table 24. Major Players of Smart Phone

Table 25. Major Players of Wearable and Consumer Electronics

Table 26. Major Players of Automotive Electronics

Table 27. Major Players of Others

Table 28. Global Electronic Glass Fabrics for IC Package Substrate Sales by End Use (2021-2026) & (K Sqm)

Table 29. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by End Use (2021-2026)

Table 30. Global Electronic Glass Fabrics for IC Package Substrate Revenue by End Use (2021-2026) & (\$ million)

Table 31. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by End Use (2021-2026)

Table 32. Global Electronic Glass Fabrics for IC Package Substrate Sale Price by End Use (2021-2026) & (US\$/Sq m)

Table 33. Global Electronic Glass Fabrics for IC Package Substrate Sale by Application (2021-2026) & (K Sqm)

Table 34. Global Electronic Glass Fabrics for IC Package Substrate Sale Market Share by Application (2021-2026)

Table 35. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Application (2021-2026) & (\$ million)

Table 36. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Application (2021-2026)

Table 37. Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Application (2021-2026) & (US\$/Sq m)

Table 38. Global Electronic Glass Fabrics for IC Package Substrate Sales by Company (2021-2026) & (K Sqm)

Table 39. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Company (2021-2026)

Table 40. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Company (2021-2026) & (\$ millions)

Table 41. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Company (2021-2026)

Table 42. Global Electronic Glass Fabrics for IC Package Substrate Sale Price by Company (2021-2026) & (US\$/Sq m)

Table 43. Key Manufacturers Electronic Glass Fabrics for IC Package Substrate Producing Area Distribution and Sales Area

Table 44. Players Electronic Glass Fabrics for IC Package Substrate Products Offered

Table 45. Electronic Glass Fabrics for IC Package Substrate Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 46. New Products and Potential Entrants

Table 47. Market M&A Activity & Strategy

Table 48. Global Electronic Glass Fabrics for IC Package Substrate Sales by Geographic Region (2021-2026) & (K Sqm)

Table 49. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share Geographic Region (2021-2026)

Table 50. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 51. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Geographic Region (2021-2026)

Table 52. Global Electronic Glass Fabrics for IC Package Substrate Sales by Country/Region (2021-2026) & (K Sqm)

Table 53. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country/Region (2021-2026)

Table 54. Global Electronic Glass Fabrics for IC Package Substrate Revenue by Country/Region (2021-2026) & (\$ millions)

Table 55. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Country/Region (2021-2026)

Table 56. Americas Electronic Glass Fabrics for IC Package Substrate Sales by Country (2021-2026) & (K Sqm)

Table 57. Americas Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country (2021-2026)

Table 58. Americas Electronic Glass Fabrics for IC Package Substrate Revenue by Country (2021-2026) & (\$ millions)

Table 59. Americas Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026) & (K Sqm)

Table 60. Americas Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026) & (K Sqm)

Table 61. APAC Electronic Glass Fabrics for IC Package Substrate Sales by Region (2021-2026) & (K Sqm)

Table 62. APAC Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Region (2021-2026)

Table 63. APAC Electronic Glass Fabrics for IC Package Substrate Revenue by Region (2021-2026) & (\$ millions)

Table 64. APAC Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026) & (K Sqm)

Table 65. APAC Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026) & (K Sqm)

Table 66. Europe Electronic Glass Fabrics for IC Package Substrate Sales by Country

(2021-2026) & (K Sqm)

Table 67. Europe Electronic Glass Fabrics for IC Package Substrate Revenue by Country (2021-2026) & (\$ millions)

Table 68. Europe Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026) & (K Sqm)

Table 69. Europe Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026) & (K Sqm)

Table 70. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Country (2021-2026) & (K Sqm)

Table 71. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Country (2021-2026)

Table 72. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Technology (2021-2026) & (K Sqm)

Table 73. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales by Application (2021-2026) & (K Sqm)

Table 74. Key Market Drivers & Growth Opportunities of Electronic Glass Fabrics for IC Package Substrate

Table 75. Key Market Challenges & Risks of Electronic Glass Fabrics for IC Package Substrate

Table 76. Key Industry Trends of Electronic Glass Fabrics for IC Package Substrate

Table 77. Electronic Glass Fabrics for IC Package Substrate Raw Material

Table 78. Key Suppliers of Raw Materials

Table 79. Electronic Glass Fabrics for IC Package Substrate Distributors List

Table 80. Electronic Glass Fabrics for IC Package Substrate Customer List

Table 81. Global Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Region (2027-2032) & (K Sqm)

Table 82. Global Electronic Glass Fabrics for IC Package Substrate Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Americas Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Country (2027-2032) & (K Sqm)

Table 84. Americas Electronic Glass Fabrics for IC Package Substrate Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. APAC Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Region (2027-2032) & (K Sqm)

Table 86. APAC Electronic Glass Fabrics for IC Package Substrate Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 87. Europe Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Country (2027-2032) & (K Sqm)

Table 88. Europe Electronic Glass Fabrics for IC Package Substrate Revenue Forecast

by Country (2027-2032) & (\$ millions)

Table 89. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Country (2027-2032) & (K Sqm)

Table 90. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. Global Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Technology (2027-2032) & (K Sqm)

Table 92. Global Electronic Glass Fabrics for IC Package Substrate Revenue Forecast by Technology (2027-2032) & (\$ millions)

Table 93. Global Electronic Glass Fabrics for IC Package Substrate Sales Forecast by Application (2027-2032) & (K Sqm)

Table 94. Global Electronic Glass Fabrics for IC Package Substrate Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 95. Nittobo (Nitto Boseki) Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 96. Nittobo (Nitto Boseki) Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 97. Nittobo (Nitto Boseki) Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 98. Nittobo (Nitto Boseki) Main Business

Table 99. Nittobo (Nitto Boseki) Latest Developments

Table 100. Taiwan Glass Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 101. Taiwan Glass Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 102. Taiwan Glass Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 103. Taiwan Glass Main Business

Table 104. Taiwan Glass Latest Developments

Table 105. AGY Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 106. AGY Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 107. AGY Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 108. AGY Main Business

Table 109. AGY Latest Developments

Table 110. Asahi Kasei Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 111. Asahi Kasei Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 112. Asahi Kasei Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 113. Asahi Kasei Main Business

Table 114. Asahi Kasei Latest Developments

Table 115. Panasonic Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 116. Panasonic Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 117. Panasonic Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 118. Panasonic Main Business

Table 119. Panasonic Latest Developments

Table 120. NAN-YA Glass Fabrics Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 121. NAN-YA Glass Fabrics Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 122. NAN-YA Glass Fabrics Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 123. NAN-YA Glass Fabrics Main Business

Table 124. NAN-YA Glass Fabrics Latest Developments

Table 125. Grace Fabric Technology Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 126. Grace Fabric Technology Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 127. Grace Fabric Technology Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 128. Grace Fabric Technology Main Business

Table 129. Grace Fabric Technology Latest Developments

Table 130. Baotek Industrial Materials Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 131. Baotek Industrial Materials Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 132. Baotek Industrial Materials Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 133. Baotek Industrial Materials Main Business

Table 134. Baotek Industrial Materials Latest Developments

Table 135. Fulltech Fiber Glass Corporation Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 136. Fulltech Fiber Glass Corporation Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 137. Fulltech Fiber Glass Corporation Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 138. Fulltech Fiber Glass Corporation Main Business

Table 139. Fulltech Fiber Glass Corporation Latest Developments

Table 140. Henan Guangyuan new material Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 141. Henan Guangyuan new material Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 142. Henan Guangyuan new material Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 143. Henan Guangyuan new material Main Business

Table 144. Henan Guangyuan new material Latest Developments

Table 145. Sinoma Science & Technology Basic Information, Electronic Glass Fabrics for IC Package Substrate Manufacturing Base, Sales Area and Its Competitors

Table 146. Sinoma Science & Technology Electronic Glass Fabrics for IC Package Substrate Product Portfolios and Specifications

Table 147. Sinoma Science & Technology Electronic Glass Fabrics for IC Package Substrate Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 148. Sinoma Science & Technology Main Business

Table 149. Sinoma Science & Technology Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Electronic Glass Fabrics for IC Package Substrate
- Figure 2. Electronic Glass Fabrics for IC Package Substrate Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Electronic Glass Fabrics for IC Package Substrate Sales Growth Rate 2021-2032 (K Sqm)
- Figure 7. Global Electronic Glass Fabrics for IC Package Substrate Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Electronic Glass Fabrics for IC Package Substrate Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country/Region (2025)
- Figure 10. Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Low-CTE Glass Cloth
- Figure 12. Product Picture of Low-Dk / Low-Df Glass Cloth
- Figure 13. Product Picture of E-glass
- Figure 14. Product Picture of Quartz Q-glass
- Figure 15. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology in 2026
- Figure 16. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Technology (2021-2026)
- Figure 17. Product Picture of FCBGA Substrate
- Figure 18. Product Picture of FCCSP Substrate
- Figure 19. Product Picture of WB-CSP/BGA
- Figure 20. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Substrate Type in 2026
- Figure 21. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Substrate Type (2021-2026)
- Figure 22. Product Picture of PCs
- Figure 23. Product Picture of Server/Data Center
- Figure 24. Product Picture of AI/HPC Chips
- Figure 25. Product Picture of Communication
- Figure 26. Product Picture of Smart Phone

Figure 27. Product Picture of Wearable and Consumer Electronics

Figure 28. Product Picture of Automotive Electronics

Figure 29. Product Picture of Others

Figure 30. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by End Use in 2026

Figure 31. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by End Use (2021-2026)

Figure 32. Electronic Glass Fabrics for IC Package Substrate Consumed in ABF Substrate

Figure 33. Global Electronic Glass Fabrics for IC Package Substrate Market: ABF Substrate (2021-2026) & (K Sqm)

Figure 34. Electronic Glass Fabrics for IC Package Substrate Consumed in BT Substrate

Figure 35. Global Electronic Glass Fabrics for IC Package Substrate Market: BT Substrate (2021-2026) & (K Sqm)

Figure 36. Global Electronic Glass Fabrics for IC Package Substrate Sale Market Share by Application (2025)

Figure 37. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Application in 2026

Figure 38. Electronic Glass Fabrics for IC Package Substrate Sales by Company in 2026 (K Sqm)

Figure 39. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Company in 2026

Figure 40. Electronic Glass Fabrics for IC Package Substrate Revenue by Company in 2026 (\$ millions)

Figure 41. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Company in 2026

Figure 42. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Geographic Region (2021-2026)

Figure 43. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Geographic Region in 2026

Figure 44. Americas Electronic Glass Fabrics for IC Package Substrate Sales 2021-2026 (K Sqm)

Figure 45. Americas Electronic Glass Fabrics for IC Package Substrate Revenue 2021-2026 (\$ millions)

Figure 46. APAC Electronic Glass Fabrics for IC Package Substrate Sales 2021-2026 (K Sqm)

Figure 47. APAC Electronic Glass Fabrics for IC Package Substrate Revenue 2021-2026 (\$ millions)

Figure 48. Europe Electronic Glass Fabrics for IC Package Substrate Sales 2021-2026 (K Sqm)

Figure 49. Europe Electronic Glass Fabrics for IC Package Substrate Revenue 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales 2021-2026 (K Sqm)

Figure 51. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Revenue 2021-2026 (\$ millions)

Figure 52. Americas Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country in 2026

Figure 53. Americas Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Country (2021-2026)

Figure 54. Americas Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)

Figure 55. Americas Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Application (2021-2026)

Figure 56. United States Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Region in 2026

Figure 61. APAC Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Region (2021-2026)

Figure 62. APAC Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)

Figure 63. APAC Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Application (2021-2026)

Figure 64. China Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 67. Southeast Asia Electronic Glass Fabrics for IC Package Substrate Revenue

Growth 2021-2026 (\$ millions)

Figure 68. India Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 69. Australia Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 71. Europe Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country in 2026

Figure 72. Europe Electronic Glass Fabrics for IC Package Substrate Revenue Market Share by Country (2021-2026)

Figure 73. Europe Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)

Figure 74. Europe Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Application (2021-2026)

Figure 75. Germany Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 76. France Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Country (2021-2026)

Figure 81. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Technology (2021-2026)

Figure 82. Middle East & Africa Electronic Glass Fabrics for IC Package Substrate Sales Market Share by Application (2021-2026)

Figure 83. Egypt Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries Electronic Glass Fabrics for IC Package Substrate Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of Electronic Glass Fabrics for IC Package Substrate in 2026

Figure 89. Manufacturing Process Analysis of Electronic Glass Fabrics for IC Package Substrate

Figure 90. Industry Chain Structure of Electronic Glass Fabrics for IC Package Substrate

Figure 91. Channels of Distribution

Figure 92. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Forecast by Region (2027-2032)

Figure 93. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share Forecast by Technology (2027-2032)

Figure 95. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share Forecast by Technology (2027-2032)

Figure 96. Global Electronic Glass Fabrics for IC Package Substrate Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global Electronic Glass Fabrics for IC Package Substrate Revenue Market Share Forecast by Application (2027-2032)

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