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Global Glass-based Integrated Passive Device Market Growth 2026-2032

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Abstracts

The global Glass-based Integrated Passive Device market size is predicted to grow from US$ 91.47 million in 2025 to US$ 221 million in 2032; it is expected to grow at a CAGR of 13.5% from 2026 to 2032.

Glass-based Integrated Passive Device refers to an integrated passive component platform that uses glass as the primary substrate and integrates passive functions such as resistors, capacitors, inductors and their combinations through thin-film deposition, photolithography, metallization and through-glass-via processes. Compared with conventional discrete passive components or silicon-based integrated passive devices, glass substrates offer favorable dielectric properties, low RF loss, high dimensional stability and strong compatibility with wafer-level and advanced packaging processes. The research scope covers both Planar Glass IPD and 3D TGV Glass IPD architectures, with RC, LC and RLC passive-element combinations supporting functions such as filters, baluns, couplers and impedance-matching networks. Glass-based Integrated Passive Device is increasingly used where miniaturization, RF performance, integration density and package-level system integration are critical, particularly in mobile communications, Wi-Fi and IoT, automotive electronics and radar, satellite communications and aerospace, and advanced packaging.

Key Findings

Global Glass-based Integrated Passive Device shipments were approximately 170 million units in 2025

The average enterprise-level selling price was approximately US$0.55 per unit in 2025

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Gross margins of major manufacturers were generally around 30%–38%

Planar Glass IPD remains the mainstream architecture, while 3D TGV Glass IPD is gaining strategic importance

RF front-end integration and advanced packaging are becoming the most important technology-driven demand directions

Market Trends

Glass-based Integrated Passive Device development is moving from conventional planar passive integration toward higher-density 3D TGV architectures and package-level heterogeneous integration. Product design is increasingly focused on reducing insertion loss, shrinking footprint and improving high-frequency consistency as communication systems move toward higher operating frequencies and more complex RF front-end architectures. At the same time, glass substrates are becoming more closely connected with wafer-level packaging, chiplet integration and advanced substrate technologies, expanding the role of Glass-based Integrated Passive Device from a standalone passive component toward an integrated functional building block inside RF modules and semiconductor packages. The long-term technology direction is therefore shifting from single-function miniaturization toward multi-function passive integration, vertical interconnection and co-design with active semiconductor devices.

Market Dynamics

Drivers

Demand growth is primarily driven by continued RF front-end complexity, higher frequency bands, device miniaturization and the expansion of advanced packaging. Mobile communications, Wi-Fi, IoT and automotive radar require more filters, matching networks, couplers and other passive functions within limited board and package area. Glass substrates provide low-loss electrical characteristics and strong process compatibility, making them increasingly suitable for applications where conventional discrete passive solutions face constraints in size, parasitic effects and integration density.

Restraints

The main restraints are manufacturing complexity, process yield and cost sensitivity.

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Glass handling, thin-film patterning, metallization and TGV formation require tight control over via quality, wafer warpage, adhesion and reliability. Compared with mature ceramic and silicon passive-component supply chains, glass-based processes still have fewer standardized manufacturing platforms and a smaller supplier base. In cost-sensitive consumer applications, conventional discrete components and established silicon IPD solutions can therefore remain highly competitive.

Opportunities

The most attractive opportunities are emerging in 3D TGV integration, RF modules, chiplet-based packages and high-density semiconductor packaging. As package architectures evolve toward shorter interconnects and greater functional integration, glass can serve simultaneously as a low-loss dielectric platform, interconnect carrier and passive integration substrate. This creates opportunities for Glass-based Integrated Passive Device to move deeper into RF front-end modules, system-in-package solutions and advanced package substrates, especially where multiple passive functions can be consolidated into a single integrated structure.

Challenges

The industry still faces challenges in design standardization, mass-production yield, reliability qualification and customer adoption cycles. Performance advantages must be translated into measurable system-level benefits before customers replace mature ceramic, organic-substrate or silicon-based alternatives. In addition, the technical requirements for TGV formation, metallization, passive-element accuracy and package integration vary significantly by application, increasing customization requirements and slowing platform standardization.

Industry Chain Analysis

The upstream industry chain mainly consists of specialty glass substrates, thin-film materials, photoresists, metallization materials, process chemicals, sputtering and deposition equipment, lithography equipment, laser or etching systems for TGV formation, and wafer-level inspection and packaging equipment. The quality of the glass substrate, dielectric characteristics, thermal expansion behavior and surface flatness directly influence RF performance, process stability and manufacturing yield.

The midstream combines glass wafer processing, passive-element design, thin-film fabrication, TGV formation, redistribution, wafer-level packaging and electrical testing. Value creation is concentrated in design capability, process integration, high-frequency

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performance control and production yield rather than in glass material cost alone. Downstream demand comes from RF modules, communication terminals, IoT modules, automotive electronics, radar systems, satellite and aerospace electronics, and advanced semiconductor packaging. As integration increases, the industry chain is gradually shifting from component-level supply toward co-development with module, packaging and semiconductor customers.

Segment Insights

By product architecture, Planar Glass IPD currently represents the more mature and broadly commercialized segment because it offers relatively straightforward process integration and is suitable for filters, baluns, couplers and impedance-matching functions. 3D TGV Glass IPD has a smaller current penetration rate but stronger long-term technology potential because vertical interconnection can improve integration density, shorten electrical paths and support more complex package-level structures.

By passive-element combination, RC, LC and RLC solutions address different electrical functions, while RLC integration generally offers greater functional complexity and higher system-level integration value. By device function, filters, baluns, couplers and impedance-matching networks represent the core commercial forms. The competitive advantage of integrated designs becomes more pronounced as customers seek to replace multiple discrete components with a compact passive network.

Downstream Market Opportunities

The largest downstream opportunities are associated with applications requiring both high-frequency performance and aggressive miniaturization. Mobile communications and Wi-Fi continue to support broad RF demand, while automotive radar, satellite communications and advanced packaging create higher-value opportunities where low loss, dimensional stability and integration density are more critical. Advanced packaging is particularly important because Glass-based Integrated Passive Device can be integrated closer to active dies, potentially reducing interconnect parasitics and enabling more compact system-level architectures.

Regional Insights

Regional development is closely linked to semiconductor manufacturing, RF component ecosystems and advanced packaging capacity. Asia-Pacific has a particularly dense manufacturing base across glass processing, semiconductor packaging and

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communication electronics, supporting rapid commercialization and supply-chain integration. North America retains strengths in advanced glass, RF and packaging technology development, while Europe maintains capabilities in specialty semiconductor, RF and high-reliability electronics.

Regional competition is likely to become increasingly differentiated by manufacturing model. Markets with strong semiconductor packaging ecosystems are better positioned to scale Glass-based Integrated Passive Device production, while technology-focused regions can retain advantages in glass materials, RF design, TGV processes and specialized high-reliability applications. Cross-regional partnerships between glass technology providers, semiconductor companies and advanced packaging firms are therefore expected to remain an important commercialization pathway.

Competitive Landscape Analysis

The competitive landscape of Glass-based Integrated Passive Device is technology-driven and includes integrated semiconductor manufacturers, advanced packaging companies and specialized glass/TGV technology providers. Competitive differentiation is centered on glass process capability, passive-element precision, RF loss control, TGV quality, wafer-level integration and mass-production yield. Established semiconductor and packaging companies benefit from customer relationships and system-integration capabilities, while specialized technology companies can compete through proprietary glass processes, TGV architectures and customized passive designs. As the market moves toward 3D integration and advanced packaging, competition is expected to shift further from individual passive-component performance toward platform-level process capability and co-design with semiconductor packages.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Glass-based Integrated Passive Device landscape and highlights key trends related to product

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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 Glass-based Integrated Passive Device portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Glass-based Integrated Passive Device market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Glass-based Integrated Passive Device 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 Glass-based Integrated Passive Device.

This report presents a comprehensive overview, market shares, and growth opportunities of Glass-based Integrated Passive Device market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Planar Glass IPD

3D TGV Glass IPD

Segmentation by Passive Element Combination:

RC Type

LC Type

RLC Type

Segmentation by Device Function:

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Filters

Baluns

Couplers

Impedance Matching Networks

Segmentation by Application:

Mobile Communications

Wi-Fi & IoT

Automotive Electronics & Radar

Satellite Communications & Aerospace

Advanced Packaging

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

STMicroelectronics

3D Glass Solutions

ASE

Xiamen Sky Semiconductor Technology

Glassmicro (Chongqing) Semiconductor Tech

Suzhou Senwan Electronics Technology

Triassic (Guangdong) Technology

Suzhou Fuyi Electronic Technology

JCET

Key Questions Addressed in this Report

What is the 10-year outlook for the global Glass-based Integrated Passive Device market?

What factors are driving Glass-based Integrated Passive Device market growth, globally and by region?

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

How do Glass-based Integrated Passive Device market opportunities vary by end market size?

How does Glass-based Integrated Passive Device break out by Type, by Application?

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