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Global Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging Market Growth 2026-2032

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Abstracts

The global Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market size is predicted to grow from US$ 550 million in 2025 to US$ 861 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging, also referred to as Low-CTE electronic cloth or T-glass fabric in industry terminology, is a specialized high-end electronic-grade glass fiber fabric engineered for advanced semiconductor packaging applications. The material is defined by its coefficient of thermal expansion (CTE), typically maintained below 3 ppm/°C, which is precisely matched to the thermal expansion characteristics of silicon-based chips. This CTE compatibility is critical in AI chip packaging environments, where high-power computing generates significant temperature fluctuations during operation. The low-CTE property effectively mitigates warpage of packaging substrates and prevents solder joint fatigue failure, ensuring long-term interconnection reliability. Beyond thermal management, the material exhibits excellent dimensional stability, high elastic modulus, low dielectric loss, and superior mechanical strength. It serves as an indispensable reinforcement material in IC substrates and packaging substrates for 2.5D and 3D advanced packaging architectures, including CoWoS (Chip-on-Wafer-on-Substrate) and SoIC (System-on-Integrated-Chips) platforms. The product scope of this study primarily covers Low-CTE electronic cloth fabricated from glass fiber yarns through weaving processes, with thickness specifications ranging from ultra-thin grades (?0.03mm) to standard thicknesses, intended for AI chip packaging and related high-reliability semiconductor applications. The research object excludes standard E-glass fabrics without CTE optimization, general-purpose PCB reinforcement materials, and non-packaging applications of glass fiber textiles.

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Key Findings

Global production of Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging reached approximately 630,000 kilometers in 2025

The global average market price for this product stood at approximately US$890 per kilometer in 2025

Global total production capacity reached 780,000 kilometers in 2025, with an industry average gross margin of 25%

Nittobo dominates the global supply with an estimated 85-90% market share, while Chinese manufacturers are rapidly expanding capacity

Demand for Low-CTE electronic cloth is growing at a faster rate than Low-Dk electronic cloth, driven by CoWoS advanced packaging adoption

Market Trends

The Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market is undergoing a profound transformation driven by the exponential growth of AI computing power and the proliferation of advanced packaging technologies. The industry is witnessing three concurrent trends reshaping the product landscape. First, product performance is being pushed to new limits, with leading manufacturers developing next-generation T-glass fabrics targeting a CTE of 2.0 ppm, representing approximately a 30% reduction from the current 2.8 ppm standard. Second, the market is experiencing a clear bifurcation toward ultra-thin specifications (?0.03mm) for high-end smartphone and edge AI applications, alongside thicker grades for AI server and data center infrastructure. Third, the industry is witnessing an accelerated transition from glass-based fabrics toward quartz-based solutions (Q-cloth), which offer superior dielectric properties and even lower thermal expansion coefficients, positioning them as the preferred material for next-generation AI platforms such as NVIDIA Rubin and 1.6T switches. This technological evolution is accompanied by a structural shift in the supply chain, as downstream customers including NVIDIA, Apple, Google, and Amazon have begun directly engaging with material suppliers to secure long-term supply agreements, bypassing traditional intermediary channels.Market Dynamics

Drivers: The primary growth driver for the Low-CTE electronic cloth market is the explosive demand from AI chip manufacturers adopting CoWoS and other advanced

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packaging technologies. As AI chips increase in size and complexity, with GPU, TPU, and ASIC designs incorporating multiple chiplets and high-bandwidth memory stacks, the thermal management challenges intensify proportionally. The industry has observed that AI servers require three to five times more electronic cloth than traditional servers, with the material specification shifting from standard E-glass to Low-CTE variants. Additionally, the expanding application of Low-CTE electronic cloth in premium smartphones—particularly for applications processor substrates—has broadened the demand base beyond data center infrastructure. The deepening penetration of AI capabilities into edge devices is expected to sustain demand growth across multiple end-market segments.

Restraints: Supply-side constraints represent the most significant near-term restraint on market growth. The production of Low-CTE electronic cloth involves complex manufacturing processes, including high-temperature melting at approximately 1,300°C using expensive platinum equipment, and the drawing of glass fibers that must be thinner than human hair with zero bubbles and perfect circularity. The specialty glass formulations required for Low-CTE properties differ substantially from standard E-glass compositions, requiring dedicated melting furnaces and precise process control. Furthermore, advanced weaving looms—particularly the JAT910 model from Toyota—are essential for producing high-quality electronic cloth, and delivery lead times of 18 to 24 months have created a secondary bottleneck that constrains industry-wide capacity expansion. The limited number of qualified suppliers and the extended qualification cycles for new entrants further restrict supply responsiveness.

Opportunities: A significant market opportunity exists for manufacturers capable of qualifying as second-source suppliers to major AI chip and device manufacturers. With Nittobo's new Fukushima facility not expected to commence production until 2027, and the company's next-generation T-glass not slated for release until 2028, there is a window of opportunity for emerging suppliers to establish themselves in the supply chain. Chinese manufacturers, including Grace Fabric Technology and Sinoma Science & Technology, have already achieved technical breakthroughs and are scaling production. The market is also witnessing opportunities in product differentiation, with quartz-based fabrics (Q-cloth) representing the next frontier in performance, targeting CTE values below 2.0 ppm and superior dielectric properties for 224Gbps and higher signal transmission speeds.

Challenges: The industry faces several significant challenges. The substantial capital investment required for new production lines—with Sinoma Science & Technology committing RMB 1.4 billion for a 35 million meter specialty fabric project and Nittobo

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investing ?15 billion in its Fukushima expansion—creates high barriers to entry and financial risk for capacity expansion. Technology obsolescence risk is elevated as the industry transitions toward quartz-based solutions, potentially rendering glass-based investments less competitive. Supply chain concentration poses a systemic risk, as the industry remains highly dependent on a single dominant supplier and a limited number of specialized equipment vendors. Geopolitical tensions and trade policy uncertainty add another layer of risk, with potential impacts on cross-border supply chains and market access.

Industry Chain Analysis

The industry chain for Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging encompasses three primary tiers. The upstream segment consists of raw material suppliers providing specialty glass formulations, including high-purity silica, alumina, and magnesium oxide, as well as auxiliary materials such as sizing agents. Key upstream considerations include the availability of high-purity quartz sand for quartz-based products and the specialized melting furnaces required for low-CTE glass fiber production. The midstream segment comprises the manufacturing of electronic-grade glass fiber yarn and the subsequent weaving into fabric. This stage involves glass melting, fiber drawing, sizing application, weaving, and heat treatment processes. The manufacturing stage is characterized by high technical barriers, significant capital intensity, and extended qualification cycles. Major global manufacturers operating in this segment include Nittobo, Grace Fabric Technology, Sinoma Science & Technology (through its Taishan Fiberglass subsidiary), Asahi Kasei, Taiwan Glass, and AGY. The downstream segment encompasses copper-clad laminate (CCL) manufacturers who impregnate the electronic cloth with resin systems to produce laminate materials, followed by IC substrate and printed circuit board (PCB) fabricators who incorporate these materials into finished substrates for AI chip packaging. The value creation within this chain is concentrated in the midstream manufacturing stage, where proprietary glass formulations and precision weaving capabilities differentiate product performance and command significant pricing premiums over standard E-glass fabrics.

Segment Insights

The Low Thermal Expansion Coefficient Electronic Cloth market can be segmented along multiple dimensions. By performance classification, the market encompasses three primary grades: Standard E-cloth, which serves as the baseline electronic fabric without CTE optimization; Low-CTE cloth (T-glass), which represents the core focus of this study with CTE values typically below 3 ppm/°C; and Quartz cloth (Q-cloth), which

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offers superior thermal and dielectric performance at a higher cost point. By thickness, products are categorized into ultra-thin (?0.03mm), medium (0.03-0.10mm), and thick (?0.10mm) grades, with ultra-thin products commanding significant technical premiums due to the difficulty of maintaining uniform fiber diameter and defect-free weaving at such minimal thicknesses. By weaving architecture, bidirectional and multidirectional fabrics serve different mechanical reinforcement requirements, with multidirectional constructions offering enhanced dimensional stability for larger chip packages. The Low-CTE segment is experiencing the most rapid growth among performance classifications, driven by the proliferation of CoWoS and other advanced packaging technologies. Within the thickness dimension, ultra-thin grades (?0.03mm) are seeing particularly strong demand from premium smartphone applications, while medium-thickness products dominate AI server and data center applications. The market is also witnessing the emergence of next-generation products, with Nittobo targeting a 2028 launch for T-glass with CTE reduced to 2.0 ppm, representing approximately a 30% improvement over current specifications.

Downstream Market Opportunities

The downstream market for Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging is anchored by three primary application clusters. AI data center infrastructure represents the largest and fastest-growing opportunity, with AI servers requiring three to five times the electronic cloth content of traditional servers, all of which must meet Low-CTE specifications. Within this cluster, the adoption of CoWoS and other advanced packaging technologies for GPU, TPU, and ASIC processors is the primary demand driver. High-end smartphones and consumer electronics constitute the second major application, with Low-CTE electronic cloth being used in applications processor substrates for flagship devices. The third opportunity lies in emerging applications including automotive electronics for advanced driver-assistance systems and aerospace applications requiring high-reliability packaging. The demand growth trajectory across these segments is asymmetric, with AI infrastructure applications exhibiting the steepest growth curve. The total demand for Low-CTE electronic cloth is projected to increase from approximately 670,000 meters in 2025 to 18 million meters in 2026 and exceed 33.6 million meters by 2027. This rapid demand expansion, coupled with constrained supply, is creating significant opportunities for qualified suppliers to capture market share and establish long-term customer relationships.

Regional Insights

The Asia-Pacific region dominates the global market for Low Thermal Expansion

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Coefficient Electronic Cloth for AI Chip Packaging, accounting for the majority of global production capacity and consumption. Japan maintains its position as the technology leader and primary supply source, with Nittobo controlling an estimated 85-90% of the global T-glass market. The company's production base in Fukushima and its Taiwan-based Nittobo Asia Glass Fiber operations constitute the industry's most significant manufacturing footprint. China has emerged as the most dynamic regional market, with multiple domestic manufacturers achieving technical breakthroughs and scaling production capabilities. Grace Fabric Technology has established itself as the world's second-largest T-glass supplier and the only Chinese manufacturer capable of mass-producing ultra-thin T-glass. Sinoma Science & Technology, through its Taishan Fiberglass subsidiary, has invested significantly in Low-CTE production capacity, positioning itself as a comprehensive specialty fabric supplier. Taiwan serves as a critical production hub, hosting Nittobo's Asian manufacturing operations and Taiwan Glass's Low-CTE production lines. The North American and European markets are primarily consumption centers, with limited domestic production capacity, making them dependent on Asian supply sources. The regional competitive dynamics are characterized by Japanese technological leadership, rapid Chinese capacity expansion, and a structural supply-demand imbalance that is expected to persist through 2027.

Competitive Landscape Analysis

The competitive landscape for Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging is characterized by extreme concentration, with a single dominant supplier and a small number of emerging challengers. Nittobo holds an estimated 85-90% share of the global T-glass market, a position built on decades of proprietary glass formulation expertise and precision manufacturing capabilities. The company's T-glass has become the de facto industry standard, with major AI chip manufacturers specifying Nittobo as the preferred or exclusive supplier. Grace Fabric Technology has emerged as the world's second-largest T-glass supplier and the leading Chinese manufacturer in this segment, with its ultra-thin T-glass products having received certification from major downstream customers and entering volume production in 2025. Sinoma Science & Technology, through its Taishan Fiberglass subsidiary, has established itself as a comprehensive specialty electronic fabric supplier with Low-CTE production capabilities, backed by significant capital investment in new production lines. Other notable competitors include Taiwan Glass, which has been actively developing Low-CTE production capacity; Asahi Kasei, which supplies low-dielectric materials and is developing quartz-based cloth; and AGY, which has partnered with JPS Composite Materials on domestic Low-CTE glass fiber fabric production. Emerging Chinese manufacturers including Guangyuan New Materials and International Composites are

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investing heavily in Low-CTE capacity, with Guangyuan having commissioned its Low-CTE production line in October 2025. The competitive dynamics are expected to evolve significantly as new capacity comes online, with the supply-demand imbalance creating opportunities for second-source qualification and market share gains among capable suppliers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging Industry Forecast” looks at past sales and reviews total world Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging sales in 2025, providing a comprehensive analysis by region and market sector of projected Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging sales for 2026 through 2032. With Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging industry.

This Insight Report provides a comprehensive analysis of the global Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging 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 Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging 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 Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Low Thermal Expansion Coefficient Electronic Cloth for AI Chip

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Packaging market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Standard E-cloth

Low-CTE Cloth

Quartz Cloth

Segmentation by Thickness:

?0.03mm

0.03-0.10mm

?0.10mm

Segmentation by Fabric Weave:

Bidirectional

Multidirectional

Segmentation by Application:

Electronics and Semiconductors

Aerospace

Sports Equipment

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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

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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

Sinoma Science & Technology

Grace Fabric Technology Co.,Ltd.

Feilihua

Asahi Kasei

Unitika Ltd.

Changhai Co., Ltd.

Taiwan Glass Group

AGY

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market?

What factors are driving Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market growth, globally and by region?

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

How do Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging market opportunities vary by end market size?

How does Low Thermal Expansion Coefficient Electronic Cloth for AI Chip Packaging break out by Type, by Application?

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