

Global TGV (Through Glass Via) Foundry Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global TGV (Through Glass Via) Foundry market size is predicted to grow from US\$ 144 million in 2025 to US\$ 493 million in 2032; it is expected to grow at a CAGR of 19.6% from 2026 to 2032.

Through-glass via (TGV) foundry refers to the process of making tiny vertical through holes (usually with a diameter of 10 μ m~100 μ m) on high-quality borosilicate glass or quartz glass substrates through a series of high-precision processes, and filling these through holes with conductive materials (such as copper) to achieve electrical connections. This technology uses laser etching, inductively coupled plasma dry etching and other methods to prepare through holes. It has the advantages of excellent high-frequency electrical properties, strong mechanical stability, low cost, and simple process flow. It has broad application prospects in the fields of precision devices such as Mini/Micro LED direct display and semiconductor advanced packaging substrates. In 2024, global TGV Substrate production reached approximately 4,000 K Pcs, with an average global market price of around US\$ 30 per piece.

TGV substrates exhibit excellent high-frequency electrical properties. The dielectric constant of glass is approximately one-third that of silicon, and the dissipation factor is two to three orders of magnitude lower than silicon. This significantly reduces substrate losses and parasitic effects, ensuring signal integrity. TGV substrate production eliminates the need for complex insulating layer deposition processes, and thinning is not required in the ultra-thin interposer, streamlining the production process and improving efficiency. Due to the readily available availability of large-scale, ultra-thin panel glass and the elimination of the need for insulating layer deposition on the substrate surface or the inner walls of the TGV, production costs are significantly reduced. Even with an interposer thickness less than 100 μ m, warpage remains minimal,

ensuring the stability and reliability of the package structure. TGV substrates offer unique advantages in applications such as RF chips, high-end MEMS sensors, and high-density system integration, making them a preferred choice for next-generation high-frequency chip 3D packaging.

The Through Glass Via (TGV) foundry market is entering a rapid growth phase, driven by demand for high-density interconnects in advanced packaging, photonics, MEMS, and RF modules. Over the next five years, adoption will accelerate as TGV technology enables superior electrical performance, thermal stability, and miniaturization compared to traditional substrates. Asia—especially China, Japan, and South Korea—is expected to lead in scaling production capacity, while North America and Europe focus on high-reliability and defense-related applications. With its high technical barriers and expanding use in 2.5D/3D integration, the TGV foundry segment is projected to achieve strong profitability as yield, automation, and panel-level processing improve.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for TGV (Through Glass Via) Foundry and breaks down the forecast by Size, 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 TGV (Through Glass Via) Foundry.

This report presents a comprehensive overview, market shares, and growth opportunities of TGV (Through Glass Via) Foundry market by product type, application, key players and key regions and countries.

Segmentation by Size:

300mm

200mm

≤150mm

Segmentation by Type:

Panel-Level TGV Substrate

Wafer-Level TGV Substrate

Segmentation by Metallization Methods:

Electroplated Copper Filling

Sputtering Metallization

Nanometallic Slurry Filling

Segmentation by Application:

Consumer Electronics

Automotive Industry

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 analyzing the company's coverage, product portfolio, its market penetration.

Corning

Samtec

Plan Optik

Vitron (LPKF)

WOP

E&R

Kiso Micro

3D Glass Solutions

Nanosystems

NSC

NICHIWA KOGYO

Sky Semiconductor

Jiangxi Woge Optoelectronics

Chengdu Micro-Technology

Hubei W-OLF PHOTOELECTRIC Technology

Sai MicroElectronics

Zhejiang Lante Optics

Suzhou Senwan Electronics Technology

Group Up Industrial

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