

Global Third Generation LOW DK3 (Quartz Cloth) Market Growth 2026-2032

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Abstracts

The global Third Generation LOW DK3 (Quartz Cloth) market size is predicted to grow from US\$ 174 million in 2025 to US\$ 857 million in 2032; it is expected to grow at a CAGR of 21.1% from 2026 to 2032.

Electronic cloth is a crucial reinforcing material for copper-clad laminates (CCLs). Its dielectric constant, along with the dielectric constant and dielectric loss properties of the resin, jointly determine the dielectric performance of the CCL. Electronic cloth is classified into three generations: first-generation (alkali-free glass fiber), second-generation (modified glass fiber), and third-generation (Q-cloth/quartz fiber cloth). Third-generation electronic cloth (Q-cloth) uses quartz fiber as its raw material. Traditional electronic cloth uses e-glass fiber, which has a dielectric constant of approximately 7 and a dielectric loss of approximately 6/1000 at 1 MHz. Modified glass fibers such as d, NE, and I have dielectric constants below 4-5 and dielectric losses reduced to 5/10000-6/10000. Quartz fiber, being high-purity silicon dioxide, has a dielectric constant of approximately 3.78 and a theoretical dielectric loss of up to 1/10000, significantly lower than glass fiber, resulting in superior dielectric performance. Driven by the demands for high-speed transmission and large capacity, specialty glass fibers are undergoing product upgrades, transitioning from traditional glass fiber to quartz fiber.

Third Generation Low DK3 (Quartz Cloth) is a high-performance electronic-grade quartz fiber fabric woven from high-purity quartz fibers, resulting in a uniform fabric surface. Its characteristics include ultra-low dielectric constant ($D_k \approx 3.0$), extremely low dielectric loss ($D_f \approx 0.001$), extremely low coefficient of thermal expansion ($CTE \approx 0.5$ ppm/?), and high dimensional stability. This type of quartz cloth is primarily used in high-frequency, high-speed electronic applications, such as copper-clad laminates (CCLs) for millimeter-

wave/terahertz circuits, AI servers, and high-speed optical modules. It represents the latest generation of quartz cloth development, balancing ultra-low signal loss with industrial-scale production capabilities.

Production Capacity Layout:

2025: Feilihua Q-type fabric production capacity: 50,000 meters/month; Sinoma Science & Technology Q-type fabric production capacity: 15,000 meters/month

2026: Feilihua Q-type fabric production capacity target: 30 million square meters (approximately 3 million meters), certified by NVIDIA.

Global production of Third Generation Low DK3 (Quartz Cloth) is projected to reach 6.66 million meters in 2025, with an average selling price of \$15.49-\$38.02 per meter and a gross profit margin of approximately 45%.

Currently, chip manufacturers have carried out research on 224G high-speed interconnect technology. The 224G motherboard is mainly based on high-speed PCB, which has extremely high requirements for the dielectric loss of PCB materials. Data centers are one of the main application areas of 224G, involving servers, network routers, storage and other equipment, which require a large number of high-speed PCBs. In terms of performance comparison, under 10 GHz conditions, the dielectric constant of quartz fiber can be reduced to below 4, and the dielectric loss limit is $2/10000$, while the dielectric loss threshold of traditional glass fiber is $1/1000$. In the copper clad laminate grade standard (such as Panasonic's M5M9), the M9 standard requires a dielectric loss of less than $9/10000$, and it is necessary to break through the bottleneck of $1/1000$. Traditional glass fiber is limited, and the quartz fiber solution has become a clear direction.

The quartz fiber electronic cloth industry is on a rapid growth trajectory, with technological innovation and application expansion continuously driving market development. Fields such as 5G communication, AI, and high-performance computing have placed significantly higher demands on the dielectric properties of high-frequency and high-speed substrates. Quartz fiber electronic cloth, with its extremely low dielectric constant and excellent high-temperature stability, is becoming an important material to replace traditional glass fiber and organic substrates. The strong demand for high-reliability materials in aerospace and defense electronic systems, as well as the standardized requirements for ultra-high purity materials in semiconductor manufacturing equipment, are among the main drivers of industry demand growth.

Meanwhile, continuous technological breakthroughs by major global manufacturers in high-purity quartz fiber preparation, weaving precision, and surface treatment processes will further broaden downstream application boundaries and increase market penetration.

Despite the broad market prospects, the industry supply chain still faces significant challenges. High-purity quartz raw material resources are concentrated, and global supply is highly dependent on specific mining areas, leading to high volatility risks in raw material prices. Furthermore, large investments in production equipment, high technological barriers, and difficult equipment maintenance all limit the rapid expansion of new capacity. International trade barriers, intellectual property protection, and regulatory standards (such as REACH and IPC/MIL standards) also increase the uncertainty of cross-border market expansion. Prices remain high, and cost-sensitive application areas such as consumer electronics and low-to-mid-range industrial markets still face substitution threats, limiting the rapid expansion of the industry's overall scale.

Downstream demand is evolving towards high-end and customized products. With global semiconductor manufacturing capacity concentrating in the Asia-Pacific region, especially with the expansion of wafer fabs in China, Japan, and South Korea, the requirements for extremely low metal impurities and repeatable batch quality in electronic-grade quartz fiber cloth are becoming increasingly stringent. Furthermore, future radar systems, high-temperature gas turbine sensors, and next-generation satellite communication equipment will place higher demands on the heat resistance, radiation resistance, and electromagnetic transparency of materials. This will further increase the demand for quartz fiber electronic cloth in the high-end equipment manufacturing sector. Overall, downstream industry demand is trending towards more specialized niche markets with higher technological added value.

LP Information, Inc. (LPI) ' newest research report, the "Third Generation LOW DK3 (Quartz Cloth) Industry Forecast" looks at past sales and reviews total world Third Generation LOW DK3 (Quartz Cloth) sales in 2025, providing a comprehensive analysis by region and market sector of projected Third Generation LOW DK3 (Quartz Cloth) sales for 2026 through 2032. With Third Generation LOW DK3 (Quartz Cloth) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Third Generation LOW DK3 (Quartz Cloth) industry.

This Insight Report provides a comprehensive analysis of the global Third Generation LOW DK3 (Quartz Cloth) 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 Third Generation LOW DK3 (Quartz Cloth) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Third Generation LOW DK3 (Quartz Cloth) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Third Generation LOW DK3 (Quartz Cloth) 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 Third Generation LOW DK3 (Quartz Cloth).

This report presents a comprehensive overview, market shares, and growth opportunities of Third Generation LOW DK3 (Quartz Cloth) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fiber Diameter 10 μ m-28 μ m

Fiber Diameter Less Than 10 μ m

Segmentation by Thickness:

Ultra-Thin Quartz Fiber Cloth?? 0.1 mm?

Standard Quartz Fiber Cloth?0.1?0.3 mm?

Others

Segmentation by Dielectric Loss:

Ultra-Ultra Low?Df ? 0.0009?

Others?Df > 0.0009?

Segmentation by Application:

Data Center High-Speed ??PCBs

AI Server

5G/6G Base Station RF Modules

Semiconductor Packaging Substrate

Other

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.

Shin-Etsu Chemical Co., Ltd.?JP?

Saint-Gobain?FR?

Nittobo?JP?

Xcellent Composites?US?

Shaanxi Lighte Optoelectronics Material Co., Ltd.?CN?

Sinoma Science and Technology Co., Ltd.?CN?

Grace Fabric Technology Co., Ltd.?CN?

Hubei Feilihua Quartz Glass Co., Ltd.?CN?

Pamica Technology Corporation?CN?

Gansu Tianhong New Materials Co., Ltd.?CN?

Yaoshitech?CN?

Henan Guangyuan New Material Co., Ltd.?CN?

Key Questions Addressed in this Report

What is the 10-year outlook for the global Third Generation LOW DK3 (Quartz Cloth) market?

What factors are driving Third Generation LOW DK3 (Quartz Cloth) market growth, globally and by region?

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

How do Third Generation LOW DK3 (Quartz Cloth) market opportunities vary by end market size?

How does Third Generation LOW DK3 (Quartz Cloth) break out by Type, by Application?

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