

## AI Server Electronic Cloth



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The rapid growth of the AI industry is reshaping not only the markets for chips, servers, and cloud computing, but also the entire chain of supporting materials.



Alongside memory, power, water, and political capital, AI data center builders and major component manufacturers are now contending with a new bottleneck in their supply chains: Glass cloth.



AI servers are driving explosive demand, and low-dielectric electronic yarn holds a promising future. The explosive growth of AI technology has become a core driver: The surge in ...



Notably, glass fiber fabric is not just for AI servers. Today, it is used in a broad array of electronics—from high-end PCBs and IC substrates to smartphones, servers, and network boards.



A critical shortage of electronic cloth, a key material for AI servers, has driven inventories at some producers below 10 days, causing sustained monthly price hikes.



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As a result, high-quality electronic fiberglass cloth is becoming increasingly important in the production of high-layer-count PCBs used in AI servers, GPUs, and networking equipment.



Honghe Technology, one of the few mainland electronic-grade glass cloth producers, reported 2025 net profit growth of 745-889%, driven entirely by AI demand. The investment logic is ...



Electronic glass cloth, a core material inside copper-clad laminates used for server PCBs, has seen its fourth price increase of 2026 as AI server demand pushes deeper into the electronics ...



Caitong's main points are as follows: 1) The penetration rate of AI servers is accelerating, PCB prosperity continues to rise, driving the demand volume for electronic cloth in the Shanghai and ...



Fiberglass electronic cloth is the core substrate of high-frequency, high-speed PCBs, and the nerve network of AI servers and high-end computing equipment. Whether it's NVIDIA's high-end ...

## Contact Us

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