

Global Photomask Substrate Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Photomask Substrate competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, global sales of photomask substrates will reach 250,000 square meters, with an average selling price of approximately US\$12,400 per square meter. Photomask Substrate are the products which are formed from a chrome or molybdenum silicide based thin film on mainly quartz or soda-lime glass substrate. And they are coated by photosensitive resist materials which sensitive for electron or laser beam and resist for etching process to make circuit patterns. The main market drivers include the following:

1. Growing demand in the semiconductor industry
Expanding downstream applications
5G and AI-driven: Surges in demand for high-performance semiconductors in areas such as 5G base stations, AI chips, and automotive electronics are driving production growth for chips with process technology of 28nm and above.
Advanced process upgrades: Processes below 28nm (such as 7nm and 5nm) require mask substrates with precision down to the nanometer level, with synthetic quartz substrates becoming the preferred choice due to their high transmittance and low thermal expansion coefficient.
Accelerated domestic substitution: Domestic companies (such as Philihua and Luwei Optoelectronics) have broken through technological barriers, increasing the domestic production rate from less than 10% in 2018 to 30% in 2025, and projected to exceed 50% in 2027.
Independent third-party mask manufacturers are expanding their market share, and wafer fabs are increasing the proportion of outsourced manufacturing for mature processes (above 28nm) to 47.3%.
2. Display Panel Industry Upgrade
2. Large-Screen Trend
High-Generation Line Construction: The increase in panel production lines for Generation 8.6 and above (such as Generation 10.5) is driving demand for large photomask substrates, with substrate sizes expanding

from 1m²1m for Generation 5 to 3m²3m for Generation 11. Technological
Iteration: New display technologies such as AMOLED/LTPO/LTPS require submicron
precision for mask substrates, driving demand for high-end substrates. 3. Technological
Advancement and Material Innovation Advantages of Synthetic Quartz
Substrates Excellent Performance: High purity (impurity content

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