

# Global Binary Masks Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Binary Masks market size was valued at US\$ 2746 million in 2025 and is forecast to a readjusted size of US\$ 3713 million by 2032 with a CAGR of 4.4% during review period.

In this study, Binary Masks refer to binary photomasks used in semiconductor and related microfabrication processes. Their essence is to form transparent and opaque two-state patterns on a quartz or glass substrate so that circuit layouts or microstructures can be accurately transferred onto wafers or other substrates through lithography. Official product pages show that these masks are typically built on a mask blank, patterned through electron-beam writing, and then completed through development, etching, resist stripping, cleaning, metrology, defect inspection, and repair before release to production. They therefore serve as a critical process carrier in the front end of wafer manufacturing, linking design data to volume exposure. They mainly support mature nodes and specialty processes, while also covering selected advanced-node support scenarios, and their typical customers include logic, analog, discrete devices, power semiconductors, MEMS, photonic devices, flat-panel displays, and research or prototyping users. Common delivery forms include 1X master masks, copy masks, and reduction reticles such as 4X and 5X, while some suppliers also provide data preparation, rule checking, remote data review, online order tracking, cleaning and refurbishment, archive-based remakes, and urgent delivery services. Compared with phase shift masks and EUV reflective masks, binary masks have a simpler structure, more mature manufacturing routes, and clearer advantages in cost and lead time. As a result, they continue to hold a stable and important role in mature-line life extension, specialty-device manufacturing, regional supply-chain buildout, localization, and rapid prototyping.

Binary masks are not a marginal product displaced by advanced lithography. They remain a foundational process carrier that continues to support large-scale production across the semiconductor manufacturing system. Photronics states on its official product pages that its legacy, production-proven binary photomasks and reticles are still supplied worldwide and cover Standard 1X Photomasks, 1X masters and copies, Reduction Reticles, and Ultratech 1X Reticles. Tekscend likewise explains that binary masks are used for patterning where the line width is larger than the exposure wavelength. Taken together, these points show that binary masks have not exited the mainstream of industrial manufacturing. Instead, they continue to support mature nodes, specialty processes, and selected higher-end supporting layers. For fabs, the value lies not only in the mask itself, but in the ability to keep installed lithography tools productive with better cost control and lead-time flexibility, which is why binary masks still have durable demand in analog ICs, power devices, discrete semiconductors, driver ICs, and other application-specific products.

From a business-model and competition standpoint, the binary mask industry does not merely sell patterned glass. It sells integrated delivery capability around customers' manufacturing flow. Photronics' official pages present a structured product system spanning 1X masks, copy masks, reticles, and localized supply, while CR Micro emphasizes complete photomask manufacturing equipment, process flow, quality control, and information security. This indicates that customers are buying a repeatable and reliable manufacturing service chain rather than a one-off item. The suppliers that can build stable capabilities in data handling, mask writing, metrology, inspection, repair, delivery, and customer responsiveness are the ones most likely to win recurring business and regional customer stickiness. That is also why industry barriers are defined not only by capital equipment, but also by accumulated process know-how, defect control, customer qualification cycles, and cross-regional service capability.

From the perspective of regional structure and future opportunity, growth in Binary Masks is more likely to come from mature-node expansion, regional supply-chain restructuring, and specialty-process upgrades than from a pure dependence on the most advanced nodes. Public market research summaries indicate that binary chrome masks still held the largest 43.90% share of the photomask market in 2025, which means this category remains a key anchor for industry cash flow and baseline demand. At the same time, both Tekscend and Photronics continue to present binary masks alongside more advanced mask types on their official sites, confirming that binary masks still occupy an independent place in the value chain. Given Asia's leading role in the photomask market, and the continued investment by suppliers in China, Japan, Korea, Taiwan, and the United States, the clearest future demand drivers are likely to

remain automotive electronics, industrial control, displays, sensors, MEMS, photonic devices, and other high-mix low-volume manufacturing applications.

This report is a detailed and comprehensive analysis for global Binary Masks market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Binary Masks market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Binary Masks market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Binary Masks market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Binary Masks market shares of main players, shipments in revenue (\$ Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Binary Masks

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Binary Masks market based on the

following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Photronics, DNP, Toppan, HOYA, China Resources Microelectronics, Taiwan Mask Corporation, PDMC Technology Corporation, Shenzhen Qingyi Photomask Limited, Shenzhen Longtu Photomask Co., Ltd., SK-Electronics Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### Market Segmentation

Binary Masks market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

4'x4'

6'x6'

9'x9'

24'x30'

#### Market segment by Substrate Material

Quartz Substrate

Soda Lime Glass Substrate

Specialty Glass Substrate

#### Market segment by Mask Format And Transfer Ratio

1X Master Photomask

Copy Mask

Reduction Reticle

#### Market segment by Application

Integrated Circuit Manufacturing

Flat Panel Display Manufacturing

MEMS Manufacturing

Photonic Device Manufacturing

#### Major players covered

Photronics

DNP

Toppan

HOYA

China Resources Microelectronics

Taiwan Mask Corporation

PDMC Technology Corporation

Shenzhen Qingyi Photomask Limited

Shenzhen Longtu Photomask Co., Ltd.

SK-Electronics Co., Ltd.

Shineisha Co., Ltd.

Mitani Micronics Co., Ltd.

Micro Image Co., Ltd.

MacDermid Alpha Electronics Solutions

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Binary Masks product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Binary Masks, with price, sales quantity, revenue, and global market share of Binary Masks from 2021 to 2026.

Chapter 3, the Binary Masks competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Binary Masks breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Binary Masks market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Binary Masks.

Chapter 14 and 15, to describe Binary Masks sales channel, distributors, customers, research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

#### 1.1 Product Overview and Scope

#### 1.2 Market Estimation Caveats and Base Year

#### 1.3 Market Analysis by Type

##### 1.3.1 Overview: Global Binary Masks Consumption Value by Type: 2021 Versus 2025 Versus 2032

##### 1.3.2 4"x4"

##### 1.3.3 6"x6"

##### 1.3.4 9"x9"

##### 1.3.5 24"x30"

#### 1.4 Market Analysis by Substrate Material

##### 1.4.1 Overview: Global Binary Masks Consumption Value by Substrate Material: 2021 Versus 2025 Versus 2032

##### 1.4.2 Quartz Substrate

##### 1.4.3 Soda Lime Glass Substrate

##### 1.4.4 Specialty Glass Substrate

#### 1.5 Market Analysis by Mask Format And Transfer Ratio

##### 1.5.1 Overview: Global Binary Masks Consumption Value by Mask Format And Transfer Ratio: 2021 Versus 2025 Versus 2032

##### 1.5.2 1X Master Photomask

##### 1.5.3 Copy Mask

##### 1.5.4 Reduction Reticle

#### 1.6 Market Analysis by Application

##### 1.6.1 Overview: Global Binary Masks Consumption Value by Application: 2021 Versus 2025 Versus 2032

##### 1.6.2 Integrated Circuit Manufacturing

##### 1.6.3 Flat Panel Display Manufacturing

##### 1.6.4 MEMS Manufacturing

##### 1.6.5 Photonic Device Manufacturing

#### 1.7 Global Binary Masks Market Size & Forecast

##### 1.7.1 Global Binary Masks Consumption Value (2021 & 2025 & 2032)

##### 1.7.2 Global Binary Masks Sales Quantity (2021-2032)

##### 1.7.3 Global Binary Masks Average Price (2021-2032)

### 2 MANUFACTURERS PROFILES



## 2.1 Photronics

### 2.1.1 Photronics Details

### 2.1.2 Photronics Major Business

### 2.1.3 Photronics Binary Masks Product and Services

### 2.1.4 Photronics Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.1.5 Photronics Recent Developments/Updates

## 2.2 DNP

### 2.2.1 DNP Details

### 2.2.2 DNP Major Business

### 2.2.3 DNP Binary Masks Product and Services

### 2.2.4 DNP Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.2.5 DNP Recent Developments/Updates

## 2.3 Toppan

### 2.3.1 Toppan Details

### 2.3.2 Toppan Major Business

### 2.3.3 Toppan Binary Masks Product and Services

### 2.3.4 Toppan Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.3.5 Toppan Recent Developments/Updates

## 2.4 HOYA

### 2.4.1 HOYA Details

### 2.4.2 HOYA Major Business

### 2.4.3 HOYA Binary Masks Product and Services

### 2.4.4 HOYA Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.4.5 HOYA Recent Developments/Updates

## 2.5 China Resources Microelectronics

### 2.5.1 China Resources Microelectronics Details

### 2.5.2 China Resources Microelectronics Major Business

### 2.5.3 China Resources Microelectronics Binary Masks Product and Services

### 2.5.4 China Resources Microelectronics Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.5.5 China Resources Microelectronics Recent Developments/Updates

## 2.6 Taiwan Mask Corporation

### 2.6.1 Taiwan Mask Corporation Details

### 2.6.2 Taiwan Mask Corporation Major Business

### 2.6.3 Taiwan Mask Corporation Binary Masks Product and Services

- 2.6.4 Taiwan Mask Corporation Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.6.5 Taiwan Mask Corporation Recent Developments/Updates
- 2.7 PDMC Technology Corporation
  - 2.7.1 PDMC Technology Corporation Details
  - 2.7.2 PDMC Technology Corporation Major Business
  - 2.7.3 PDMC Technology Corporation Binary Masks Product and Services
  - 2.7.4 PDMC Technology Corporation Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.7.5 PDMC Technology Corporation Recent Developments/Updates
- 2.8 Shenzhen Qingyi Photomask Limited
  - 2.8.1 Shenzhen Qingyi Photomask Limited Details
  - 2.8.2 Shenzhen Qingyi Photomask Limited Major Business
  - 2.8.3 Shenzhen Qingyi Photomask Limited Binary Masks Product and Services
  - 2.8.4 Shenzhen Qingyi Photomask Limited Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.8.5 Shenzhen Qingyi Photomask Limited Recent Developments/Updates
- 2.9 Shenzhen Longtu Photomask Co., Ltd.
  - 2.9.1 Shenzhen Longtu Photomask Co., Ltd. Details
  - 2.9.2 Shenzhen Longtu Photomask Co., Ltd. Major Business
  - 2.9.3 Shenzhen Longtu Photomask Co., Ltd. Binary Masks Product and Services
  - 2.9.4 Shenzhen Longtu Photomask Co., Ltd. Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.9.5 Shenzhen Longtu Photomask Co., Ltd. Recent Developments/Updates
- 2.10 SK-Electronics Co., Ltd.
  - 2.10.1 SK-Electronics Co., Ltd. Details
  - 2.10.2 SK-Electronics Co., Ltd. Major Business
  - 2.10.3 SK-Electronics Co., Ltd. Binary Masks Product and Services
  - 2.10.4 SK-Electronics Co., Ltd. Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.10.5 SK-Electronics Co., Ltd. Recent Developments/Updates
- 2.11 Shineisha Co., Ltd.
  - 2.11.1 Shineisha Co., Ltd. Details
  - 2.11.2 Shineisha Co., Ltd. Major Business
  - 2.11.3 Shineisha Co., Ltd. Binary Masks Product and Services
  - 2.11.4 Shineisha Co., Ltd. Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.11.5 Shineisha Co., Ltd. Recent Developments/Updates
- 2.12 Mitani Micronics Co., Ltd.

- 2.12.1 Mitani Micronics Co., Ltd. Details
- 2.12.2 Mitani Micronics Co., Ltd. Major Business
- 2.12.3 Mitani Micronics Co., Ltd. Binary Masks Product and Services
- 2.12.4 Mitani Micronics Co., Ltd. Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.12.5 Mitani Micronics Co., Ltd. Recent Developments/Updates
- 2.13 Micro Image Co., Ltd.
  - 2.13.1 Micro Image Co., Ltd. Details
  - 2.13.2 Micro Image Co., Ltd. Major Business
  - 2.13.3 Micro Image Co., Ltd. Binary Masks Product and Services
  - 2.13.4 Micro Image Co., Ltd. Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.13.5 Micro Image Co., Ltd. Recent Developments/Updates
- 2.14 MacDermid Alpha Electronics Solutions
  - 2.14.1 MacDermid Alpha Electronics Solutions Details
  - 2.14.2 MacDermid Alpha Electronics Solutions Major Business
  - 2.14.3 MacDermid Alpha Electronics Solutions Binary Masks Product and Services
  - 2.14.4 MacDermid Alpha Electronics Solutions Binary Masks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.14.5 MacDermid Alpha Electronics Solutions Recent Developments/Updates

### **3 COMPETITIVE ENVIRONMENT: BINARY MASKS BY MANUFACTURER**

- 3.1 Global Binary Masks Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Binary Masks Revenue by Manufacturer (2021-2026)
- 3.3 Global Binary Masks Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
  - 3.4.1 Producer Shipments of Binary Masks by Manufacturer Revenue (\$MM) and Market Share (%): 2025
  - 3.4.2 Top 3 Binary Masks Manufacturer Market Share in 2025
  - 3.4.3 Top 6 Binary Masks Manufacturer Market Share in 2025
- 3.5 Binary Masks Market: Overall Company Footprint Analysis
  - 3.5.1 Binary Masks Market: Region Footprint
  - 3.5.2 Binary Masks Market: Company Product Type Footprint
  - 3.5.3 Binary Masks Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

### **4 CONSUMPTION ANALYSIS BY REGION**

#### 4.1 Global Binary Masks Market Size by Region

4.1.1 Global Binary Masks Sales Quantity by Region (2021-2032)

4.1.2 Global Binary Masks Consumption Value by Region (2021-2032)

4.1.3 Global Binary Masks Average Price by Region (2021-2032)

#### 4.2 North America Binary Masks Consumption Value (2021-2032)

#### 4.3 Europe Binary Masks Consumption Value (2021-2032)

#### 4.4 Asia-Pacific Binary Masks Consumption Value (2021-2032)

#### 4.5 South America Binary Masks Consumption Value (2021-2032)

#### 4.6 Middle East & Africa Binary Masks Consumption Value (2021-2032)

### 5 MARKET SEGMENT BY TYPE

#### 5.1 Global Binary Masks Sales Quantity by Type (2021-2032)

#### 5.2 Global Binary Masks Consumption Value by Type (2021-2032)

#### 5.3 Global Binary Masks Average Price by Type (2021-2032)

### 6 MARKET SEGMENT BY APPLICATION

#### 6.1 Global Binary Masks Sales Quantity by Application (2021-2032)

#### 6.2 Global Binary Masks Consumption Value by Application (2021-2032)

#### 6.3 Global Binary Masks Average Price by Application (2021-2032)

### 7 NORTH AMERICA

#### 7.1 North America Binary Masks Sales Quantity by Type (2021-2032)

#### 7.2 North America Binary Masks Sales Quantity by Application (2021-2032)

#### 7.3 North America Binary Masks Market Size by Country

7.3.1 North America Binary Masks Sales Quantity by Country (2021-2032)

7.3.2 North America Binary Masks Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

### 8 EUROPE

#### 8.1 Europe Binary Masks Sales Quantity by Type (2021-2032)

#### 8.2 Europe Binary Masks Sales Quantity by Application (2021-2032)

#### 8.3 Europe Binary Masks Market Size by Country

- 8.3.1 Europe Binary Masks Sales Quantity by Country (2021-2032)
- 8.3.2 Europe Binary Masks Consumption Value by Country (2021-2032)
- 8.3.3 Germany Market Size and Forecast (2021-2032)
- 8.3.4 France Market Size and Forecast (2021-2032)
- 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
- 8.3.6 Russia Market Size and Forecast (2021-2032)
- 8.3.7 Italy Market Size and Forecast (2021-2032)

## **9 ASIA-PACIFIC**

- 9.1 Asia-Pacific Binary Masks Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Binary Masks Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Binary Masks Market Size by Region
  - 9.3.1 Asia-Pacific Binary Masks Sales Quantity by Region (2021-2032)
  - 9.3.2 Asia-Pacific Binary Masks Consumption Value by Region (2021-2032)
  - 9.3.3 China Market Size and Forecast (2021-2032)
  - 9.3.4 Japan Market Size and Forecast (2021-2032)
  - 9.3.5 South Korea Market Size and Forecast (2021-2032)
  - 9.3.6 India Market Size and Forecast (2021-2032)
  - 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
  - 9.3.8 Australia Market Size and Forecast (2021-2032)

## **10 SOUTH AMERICA**

- 10.1 South America Binary Masks Sales Quantity by Type (2021-2032)
- 10.2 South America Binary Masks Sales Quantity by Application (2021-2032)
- 10.3 South America Binary Masks Market Size by Country
  - 10.3.1 South America Binary Masks Sales Quantity by Country (2021-2032)
  - 10.3.2 South America Binary Masks Consumption Value by Country (2021-2032)
  - 10.3.3 Brazil Market Size and Forecast (2021-2032)
  - 10.3.4 Argentina Market Size and Forecast (2021-2032)

## **11 MIDDLE EAST & AFRICA**

- 11.1 Middle East & Africa Binary Masks Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Binary Masks Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Binary Masks Market Size by Country
  - 11.3.1 Middle East & Africa Binary Masks Sales Quantity by Country (2021-2032)
  - 11.3.2 Middle East & Africa Binary Masks Consumption Value by Country (2021-2032)

- 11.3.3 Turkey Market Size and Forecast (2021-2032)
- 11.3.4 Egypt Market Size and Forecast (2021-2032)
- 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
- 11.3.6 South Africa Market Size and Forecast (2021-2032)

## **12 MARKET DYNAMICS**

- 12.1 Binary Masks Market Drivers
- 12.2 Binary Masks Market Restraints
- 12.3 Binary Masks Trends Analysis
- 12.4 Porters Five Forces Analysis
  - 12.4.1 Threat of New Entrants
  - 12.4.2 Bargaining Power of Suppliers
  - 12.4.3 Bargaining Power of Buyers
  - 12.4.4 Threat of Substitutes
  - 12.4.5 Competitive Rivalry

## **13 RAW MATERIAL AND INDUSTRY CHAIN**

- 13.1 Raw Material of Binary Masks and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Binary Masks
- 13.3 Binary Masks Production Process
- 13.4 Industry Value Chain Analysis

## **14 SHIPMENTS BY DISTRIBUTION CHANNEL**

- 14.1 Sales Channel
  - 14.1.1 Direct to End-User
  - 14.1.2 Distributors
- 14.2 Binary Masks Typical Distributors
- 14.3 Binary Masks Typical Customers

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 APPENDIX**

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer





## List Of Tables

### LIST OF TABLES

Table 1. Global Binary Masks Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Binary Masks Consumption Value by Substrate Material, (USD Million), 2021 & 2025 & 2032

Table 3. Global Binary Masks Consumption Value by Mask Format And Transfer Ratio, (USD Million), 2021 & 2025 & 2032

Table 4. Global Binary Masks Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Photronics Basic Information, Manufacturing Base and Competitors

Table 6. Photronics Major Business

Table 7. Photronics Binary Masks Product and Services

Table 8. Photronics Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Photronics Recent Developments/Updates

Table 10. DNP Basic Information, Manufacturing Base and Competitors

Table 11. DNP Major Business

Table 12. DNP Binary Masks Product and Services

Table 13. DNP Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. DNP Recent Developments/Updates

Table 15. Toppan Basic Information, Manufacturing Base and Competitors

Table 16. Toppan Major Business

Table 17. Toppan Binary Masks Product and Services

Table 18. Toppan Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Toppan Recent Developments/Updates

Table 20. HOYA Basic Information, Manufacturing Base and Competitors

Table 21. HOYA Major Business

Table 22. HOYA Binary Masks Product and Services

Table 23. HOYA Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. HOYA Recent Developments/Updates

Table 25. China Resources Microelectronics Basic Information, Manufacturing Base and Competitors

Table 26. China Resources Microelectronics Major Business



Table 27. China Resources Microelectronics Binary Masks Product and Services

Table 28. China Resources Microelectronics Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. China Resources Microelectronics Recent Developments/Updates

Table 30. Taiwan Mask Corporation Basic Information, Manufacturing Base and Competitors

Table 31. Taiwan Mask Corporation Major Business

Table 32. Taiwan Mask Corporation Binary Masks Product and Services

Table 33. Taiwan Mask Corporation Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Taiwan Mask Corporation Recent Developments/Updates

Table 35. PDMC Technology Corporation Basic Information, Manufacturing Base and Competitors

Table 36. PDMC Technology Corporation Major Business

Table 37. PDMC Technology Corporation Binary Masks Product and Services

Table 38. PDMC Technology Corporation Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. PDMC Technology Corporation Recent Developments/Updates

Table 40. Shenzhen Qingyi Photomask Limited Basic Information, Manufacturing Base and Competitors

Table 41. Shenzhen Qingyi Photomask Limited Major Business

Table 42. Shenzhen Qingyi Photomask Limited Binary Masks Product and Services

Table 43. Shenzhen Qingyi Photomask Limited Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Shenzhen Qingyi Photomask Limited Recent Developments/Updates

Table 45. Shenzhen Longtu Photomask Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 46. Shenzhen Longtu Photomask Co., Ltd. Major Business

Table 47. Shenzhen Longtu Photomask Co., Ltd. Binary Masks Product and Services

Table 48. Shenzhen Longtu Photomask Co., Ltd. Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Shenzhen Longtu Photomask Co., Ltd. Recent Developments/Updates

Table 50. SK-Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 51. SK-Electronics Co., Ltd. Major Business

|                                                                                                                                                                                 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table 52. SK-Electronics Co., Ltd. Binary Masks Product and Services                                                                                                            |
| Table 53. SK-Electronics Co., Ltd. Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)              |
| Table 54. SK-Electronics Co., Ltd. Recent Developments/Updates                                                                                                                  |
| Table 55. Shineisha Co., Ltd. Basic Information, Manufacturing Base and Competitors                                                                                             |
| Table 56. Shineisha Co., Ltd. Major Business                                                                                                                                    |
| Table 57. Shineisha Co., Ltd. Binary Masks Product and Services                                                                                                                 |
| Table 58. Shineisha Co., Ltd. Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)                   |
| Table 59. Shineisha Co., Ltd. Recent Developments/Updates                                                                                                                       |
| Table 60. Mitani Micronics Co., Ltd. Basic Information, Manufacturing Base and Competitors                                                                                      |
| Table 61. Mitani Micronics Co., Ltd. Major Business                                                                                                                             |
| Table 62. Mitani Micronics Co., Ltd. Binary Masks Product and Services                                                                                                          |
| Table 63. Mitani Micronics Co., Ltd. Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)            |
| Table 64. Mitani Micronics Co., Ltd. Recent Developments/Updates                                                                                                                |
| Table 65. Micro Image Co., Ltd. Basic Information, Manufacturing Base and Competitors                                                                                           |
| Table 66. Micro Image Co., Ltd. Major Business                                                                                                                                  |
| Table 67. Micro Image Co., Ltd. Binary Masks Product and Services                                                                                                               |
| Table 68. Micro Image Co., Ltd. Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026)                 |
| Table 69. Micro Image Co., Ltd. Recent Developments/Updates                                                                                                                     |
| Table 70. MacDermid Alpha Electronics Solutions Basic Information, Manufacturing Base and Competitors                                                                           |
| Table 71. MacDermid Alpha Electronics Solutions Major Business                                                                                                                  |
| Table 72. MacDermid Alpha Electronics Solutions Binary Masks Product and Services                                                                                               |
| Table 73. MacDermid Alpha Electronics Solutions Binary Masks Sales Quantity (K Pcs), Average Price (US\$/Pcs), Revenue (USD Million), Gross Margin and Market Share (2021-2026) |
| Table 74. MacDermid Alpha Electronics Solutions Recent Developments/Updates                                                                                                     |
| Table 75. Global Binary Masks Sales Quantity by Manufacturer (2021-2026) & (K Pcs)                                                                                              |
| Table 76. Global Binary Masks Revenue by Manufacturer (2021-2026) & (USD Million)                                                                                               |
| Table 77. Global Binary Masks Average Price by Manufacturer (2021-2026) & (US\$/Pcs)                                                                                            |
| Table 78. Market Position of Manufacturers in Binary Masks, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025                                                              |
| Table 79. Head Office and Binary Masks Production Site of Key Manufacturer                                                                                                      |

|                                                                                                   |
|---------------------------------------------------------------------------------------------------|
| Table 80. Binary Masks Market: Company Product Type Footprint                                     |
| Table 81. Binary Masks Market: Company Product Application Footprint                              |
| Table 82. Binary Masks New Market Entrants and Barriers to Market Entry                           |
| Table 83. Binary Masks Mergers, Acquisition, Agreements, and Collaborations                       |
| Table 84. Global Binary Masks Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR |
| Table 85. Global Binary Masks Sales Quantity by Region (2021-2026) & (K Pcs)                      |
| Table 86. Global Binary Masks Sales Quantity by Region (2027-2032) & (K Pcs)                      |
| Table 87. Global Binary Masks Consumption Value by Region (2021-2026) & (USD Million)             |
| Table 88. Global Binary Masks Consumption Value by Region (2027-2032) & (USD Million)             |
| Table 89. Global Binary Masks Average Price by Region (2021-2026) & (US\$/Pcs)                    |
| Table 90. Global Binary Masks Average Price by Region (2027-2032) & (US\$/Pcs)                    |
| Table 91. Global Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)                        |
| Table 92. Global Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)                        |
| Table 93. Global Binary Masks Consumption Value by Type (2021-2026) & (USD Million)               |
| Table 94. Global Binary Masks Consumption Value by Type (2027-2032) & (USD Million)               |
| Table 95. Global Binary Masks Average Price by Type (2021-2026) & (US\$/Pcs)                      |
| Table 96. Global Binary Masks Average Price by Type (2027-2032) & (US\$/Pcs)                      |
| Table 97. Global Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)                 |
| Table 98. Global Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)                 |
| Table 99. Global Binary Masks Consumption Value by Application (2021-2026) & (USD Million)        |
| Table 100. Global Binary Masks Consumption Value by Application (2027-2032) & (USD Million)       |
| Table 101. Global Binary Masks Average Price by Application (2021-2026) & (US\$/Pcs)              |
| Table 102. Global Binary Masks Average Price by Application (2027-2032) & (US\$/Pcs)              |
| Table 103. North America Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)                |
| Table 104. North America Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)                |
| Table 105. North America Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)         |
| Table 106. North America Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)         |
| Table 107. North America Binary Masks Sales Quantity by Country (2021-2026) & (K Pcs)             |
| Table 108. North America Binary Masks Sales Quantity by Country (2027-2032) & (K Pcs)             |

Pcs)

Table 109. North America Binary Masks Consumption Value by Country (2021-2026) & (USD Million)

Table 110. North America Binary Masks Consumption Value by Country (2027-2032) & (USD Million)

Table 111. Europe Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)

Table 112. Europe Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)

Table 113. Europe Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)

Table 114. Europe Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)

Table 115. Europe Binary Masks Sales Quantity by Country (2021-2026) & (K Pcs)

Table 116. Europe Binary Masks Sales Quantity by Country (2027-2032) & (K Pcs)

Table 117. Europe Binary Masks Consumption Value by Country (2021-2026) & (USD Million)

Table 118. Europe Binary Masks Consumption Value by Country (2027-2032) & (USD Million)

Table 119. Asia-Pacific Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)

Table 120. Asia-Pacific Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)

Table 121. Asia-Pacific Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)

Table 122. Asia-Pacific Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)

Table 123. Asia-Pacific Binary Masks Sales Quantity by Region (2021-2026) & (K Pcs)

Table 124. Asia-Pacific Binary Masks Sales Quantity by Region (2027-2032) & (K Pcs)

Table 125. Asia-Pacific Binary Masks Consumption Value by Region (2021-2026) & (USD Million)

Table 126. Asia-Pacific Binary Masks Consumption Value by Region (2027-2032) & (USD Million)

Table 127. South America Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)

Table 128. South America Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)

Table 129. South America Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)

Table 130. South America Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)

Table 131. South America Binary Masks Sales Quantity by Country (2021-2026) & (K Pcs)

Table 132. South America Binary Masks Sales Quantity by Country (2027-2032) & (K Pcs)

Table 133. South America Binary Masks Consumption Value by Country (2021-2026) & (USD Million)

Table 134. South America Binary Masks Consumption Value by Country (2027-2032) & (USD Million)

Table 135. Middle East & Africa Binary Masks Sales Quantity by Type (2021-2026) & (K Pcs)

Table 136. Middle East & Africa Binary Masks Sales Quantity by Type (2027-2032) & (K Pcs)

Table 137. Middle East & Africa Binary Masks Sales Quantity by Application (2021-2026) & (K Pcs)

Table 138. Middle East & Africa Binary Masks Sales Quantity by Application (2027-2032) & (K Pcs)

Table 139. Middle East & Africa Binary Masks Sales Quantity by Country (2021-2026) & (K Pcs)

Table 140. Middle East & Africa Binary Masks Sales Quantity by Country (2027-2032) & (K Pcs)

Table 141. Middle East & Africa Binary Masks Consumption Value by Country (2021-2026) & (USD Million)

Table 142. Middle East & Africa Binary Masks Consumption Value by Country (2027-2032) & (USD Million)

Table 143. Binary Masks Raw Material

Table 144. Key Manufacturers of Binary Masks Raw Materials

Table 145. Binary Masks Typical Distributors

Table 146. Binary Masks Typical Customers



## List Of Figures

### LIST OF FIGURES

- Figure 1. Binary Masks Picture
- Figure 2. Global Binary Masks Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Binary Masks Revenue Market Share by Type in 2025
- Figure 4. 4"x4" Examples
- Figure 5. 6"x6" Examples
- Figure 6. 9"x9" Examples
- Figure 7. 24"x30" Examples
- Figure 8. Global Binary Masks Revenue by Substrate Material, (USD Million), 2021 & 2025 & 2032
- Figure 9. Global Binary Masks Revenue Market Share by Substrate Material in 2025
- Figure 10. Quartz Substrate Examples
- Figure 11. Soda Lime Glass Substrate Examples
- Figure 12. Specialty Glass Substrate Examples
- Figure 13. Global Binary Masks Revenue by Mask Format And Transfer Ratio, (USD Million), 2021 & 2025 & 2032
- Figure 14. Global Binary Masks Revenue Market Share by Mask Format And Transfer Ratio in 2025
- Figure 15. 1X Master Photomask Examples
- Figure 16. Copy Mask Examples
- Figure 17. Reduction Reticle Examples
- Figure 18. Global Binary Masks Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 19. Global Binary Masks Revenue Market Share by Application in 2025
- Figure 20. Integrated Circuit Manufacturing Examples
- Figure 21. Flat Panel Display Manufacturing Examples
- Figure 22. MEMS Manufacturing Examples
- Figure 23. Photonic Device Manufacturing Examples
- Figure 24. Global Binary Masks Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 25. Global Binary Masks Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 26. Global Binary Masks Sales Quantity (2021-2032) & (K Pcs)
- Figure 27. Global Binary Masks Price (2021-2032) & (US\$/Pcs)
- Figure 28. Global Binary Masks Sales Quantity Market Share by Manufacturer in 2025
- Figure 29. Global Binary Masks Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of Binary Masks by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 Binary Masks Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 Binary Masks Manufacturer (Revenue) Market Share in 2025

Figure 33. Global Binary Masks Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global Binary Masks Consumption Value Market Share by Region (2021-2032)

Figure 35. North America Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 38. South America Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 40. Global Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 41. Global Binary Masks Consumption Value Market Share by Type (2021-2032)

Figure 42. Global Binary Masks Average Price by Type (2021-2032) & (US\$/Pcs)

Figure 43. Global Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global Binary Masks Revenue Market Share by Application (2021-2032)

Figure 45. Global Binary Masks Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 46. North America Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 47. North America Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America Binary Masks Sales Quantity Market Share by Country (2021-2032)

Figure 49. North America Binary Masks Consumption Value Market Share by Country (2021-2032)

Figure 50. United States Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 54. Europe Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe Binary Masks Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe Binary Masks Consumption Value Market Share by Country (2021-2032)



Figure 57. Germany Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 58. France Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 63. Asia-Pacific Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific Binary Masks Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific Binary Masks Consumption Value Market Share by Region (2021-2032)

Figure 66. China Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 69. India Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 72. South America Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 73. South America Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America Binary Masks Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America Binary Masks Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina Binary Masks Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa Binary Masks Sales Quantity Market Share by Type (2021-2032)

Figure 79. Middle East & Africa Binary Masks Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa Binary Masks Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa Binary Masks Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey Binary Masks Consumption Value (2021-2032) & (USD Million)

- Figure 83. Egypt Binary Masks Consumption Value (2021-2032) & (USD Million)
- Figure 84. Saudi Arabia Binary Masks Consumption Value (2021-2032) & (USD Million)
- Figure 85. South Africa Binary Masks Consumption Value (2021-2032) & (USD Million)
- Figure 86. Binary Masks Market Drivers
- Figure 87. Binary Masks Market Restraints
- Figure 88. Binary Masks Market Trends
- Figure 89. Porters Five Forces Analysis
- Figure 90. Manufacturing Cost Structure Analysis of Binary Masks in 2025
- Figure 91. Manufacturing Process Analysis of Binary Masks
- Figure 92. Binary Masks Industrial Chain
- Figure 93. Sales Channel: Direct to End-User vs Distributors
- Figure 94. Direct Channel Pros & Cons
- Figure 95. Indirect Channel Pros & Cons
- Figure 96. Methodology
- Figure 97. Research Process and Data Source

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