

Global Binary Masks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Binary Masks market size is expected to reach \$ 3713 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

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 studies the global Binary Masks production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Binary Masks and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Binary Masks that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Binary Masks total production and demand, 2021-2032, (K Pcs)

Global Binary Masks total production value, 2021-2032, (USD Million)

Global Binary Masks production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Binary Masks consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Binary Masks domestic production, consumption, key domestic manufacturers and share

Global Binary Masks production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Binary Masks production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Binary Masks production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Binary Masks market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Binary Masks market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Binary Masks Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Binary Masks Market, Segmentation by Type:

4'x4'

6'x6'

9'x9'

24'x30'

Global Binary Masks Market, Segmentation by Substrate Material:

Quartz Substrate

Soda Lime Glass Substrate

Specialty Glass Substrate

Global Binary Masks Market, Segmentation by Mask Format And Transfer Ratio:

1X Master Photomask

Copy Mask

Reduction Reticle

Global Binary Masks Market, Segmentation by Application:

Integrated Circuit Manufacturing

Flat Panel Display Manufacturing

MEMS Manufacturing

Photonic Device Manufacturing

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Binary Masks market?
2. What is the demand of the global Binary Masks market?
3. What is the year over year growth of the global Binary Masks market?
4. What is the production and production value of the global Binary Masks market?
5. Who are the key producers in the global Binary Masks market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Binary Masks Introduction
- 1.2 World Binary Masks Supply & Forecast
 - 1.2.1 World Binary Masks Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Binary Masks Production (2021-2032)
 - 1.2.3 World Binary Masks Pricing Trends (2021-2032)
- 1.3 World Binary Masks Production by Region (Based on Production Site)
 - 1.3.1 World Binary Masks Production Value by Region (2021-2032)
 - 1.3.2 World Binary Masks Production by Region (2021-2032)
 - 1.3.3 World Binary Masks Average Price by Region (2021-2032)
 - 1.3.4 North America Binary Masks Production (2021-2032)
 - 1.3.5 Europe Binary Masks Production (2021-2032)
 - 1.3.6 China Binary Masks Production (2021-2032)
 - 1.3.7 Japan Binary Masks Production (2021-2032)
 - 1.3.8 South Korea Binary Masks Production (2021-2032)
 - 1.3.9 China Taiwan Binary Masks Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Binary Masks Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Binary Masks Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Binary Masks Demand (2021-2032)
- 2.2 World Binary Masks Consumption by Region
 - 2.2.1 World Binary Masks Consumption by Region (2021-2026)
 - 2.2.2 World Binary Masks Consumption Forecast by Region (2027-2032)
- 2.3 United States Binary Masks Consumption (2021-2032)
- 2.4 China Binary Masks Consumption (2021-2032)
- 2.5 Europe Binary Masks Consumption (2021-2032)
- 2.6 Japan Binary Masks Consumption (2021-2032)
- 2.7 South Korea Binary Masks Consumption (2021-2032)
- 2.8 ASEAN Binary Masks Consumption (2021-2032)
- 2.9 India Binary Masks Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Binary Masks Production Value by Manufacturer (2021-2026)

3.2 World Binary Masks Production by Manufacturer (2021-2026)

3.3 World Binary Masks Average Price by Manufacturer (2021-2026)

3.4 Binary Masks Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Binary Masks Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Binary Masks in 2025

3.5.3 Global Concentration Ratios (CR8) for Binary Masks in 2025

3.6 Binary Masks Market: Overall Company Footprint Analysis

3.6.1 Binary Masks Market: Region Footprint

3.6.2 Binary Masks Market: Company Product Type Footprint

3.6.3 Binary Masks Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Binary Masks Production Value Comparison

4.1.1 United States VS China: Binary Masks Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Binary Masks Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Binary Masks Production Comparison

4.2.1 United States VS China: Binary Masks Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Binary Masks Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Binary Masks Consumption Comparison

4.3.1 United States VS China: Binary Masks Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Binary Masks Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Binary Masks Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Binary Masks Manufacturers, Headquarters and Production

Site (States, Country)

4.4.2 United States Based Manufacturers Binary Masks Production Value (2021-2026)

4.4.3 United States Based Manufacturers Binary Masks Production (2021-2026)

4.5 China Based Binary Masks Manufacturers and Market Share

4.5.1 China Based Binary Masks Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Binary Masks Production Value (2021-2026)

4.5.3 China Based Manufacturers Binary Masks Production (2021-2026)

4.6 Rest of World Based Binary Masks Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Binary Masks Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Binary Masks Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Binary Masks Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Binary Masks Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 4"x4"

5.2.2 6"x6"

5.2.3 9"x9"

5.2.4 24"x30"

5.3 Market Segment by Type

5.3.1 World Binary Masks Production by Type (2021-2032)

5.3.2 World Binary Masks Production Value by Type (2021-2032)

5.3.3 World Binary Masks Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY SUBSTRATE MATERIAL

6.1 World Binary Masks Market Size Overview by Substrate Material: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Substrate Material

6.2.1 Quartz Substrate

6.2.2 Soda Lime Glass Substrate

6.2.3 Specialty Glass Substrate

6.3 Market Segment by Substrate Material

6.3.1 World Binary Masks Production by Substrate Material (2021-2032)

6.3.2 World Binary Masks Production Value by Substrate Material (2021-2032)

6.3.3 World Binary Masks Average Price by Substrate Material (2021-2032)

7 MARKET ANALYSIS BY MASK FORMAT AND TRANSFER RATIO

7.1 World Binary Masks Market Size Overview by Mask Format And Transfer Ratio:
2021 VS 2025 VS 2032

7.2 Segment Introduction by Mask Format And Transfer Ratio

7.2.1 1X Master Photomask

7.2.2 Copy Mask

7.2.3 Reduction Reticle

7.3 Market Segment by Mask Format And Transfer Ratio

7.3.1 World Binary Masks Production by Mask Format And Transfer Ratio (2021-2032)

7.3.2 World Binary Masks Production Value by Mask Format And Transfer Ratio
(2021-2032)

7.3.3 World Binary Masks Average Price by Mask Format And Transfer Ratio
(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Binary Masks Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Integrated Circuit Manufacturing

8.2.2 Flat Panel Display Manufacturing

8.2.3 MEMS Manufacturing

8.2.4 Photonic Device Manufacturing

8.3 Market Segment by Application

8.3.1 World Binary Masks Production by Application (2021-2032)

8.3.2 World Binary Masks Production Value by Application (2021-2032)

8.3.3 World Binary Masks Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Photonics

9.1.1 Photonics Details

9.1.2 Photonics Major Business

9.1.3 Photonics Binary Masks Product and Services

9.1.4 Photonics Binary Masks Production, Price, Value, Gross Margin and Market
Share (2021-2026)

9.1.5 Photonics Recent Developments/Updates

9.1.6 Photonics Competitive Strengths & Weaknesses

9.2 DNP

9.2.1 DNP Details

9.2.2 DNP Major Business

9.2.3 DNP Binary Masks Product and Services

9.2.4 DNP Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 DNP Recent Developments/Updates

9.2.6 DNP Competitive Strengths & Weaknesses

9.3 Toppan

9.3.1 Toppan Details

9.3.2 Toppan Major Business

9.3.3 Toppan Binary Masks Product and Services

9.3.4 Toppan Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Toppan Recent Developments/Updates

9.3.6 Toppan Competitive Strengths & Weaknesses

9.4 HOYA

9.4.1 HOYA Details

9.4.2 HOYA Major Business

9.4.3 HOYA Binary Masks Product and Services

9.4.4 HOYA Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 HOYA Recent Developments/Updates

9.4.6 HOYA Competitive Strengths & Weaknesses

9.5 China Resources Microelectronics

9.5.1 China Resources Microelectronics Details

9.5.2 China Resources Microelectronics Major Business

9.5.3 China Resources Microelectronics Binary Masks Product and Services

9.5.4 China Resources Microelectronics Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 China Resources Microelectronics Recent Developments/Updates

9.5.6 China Resources Microelectronics Competitive Strengths & Weaknesses

9.6 Taiwan Mask Corporation

9.6.1 Taiwan Mask Corporation Details

9.6.2 Taiwan Mask Corporation Major Business

9.6.3 Taiwan Mask Corporation Binary Masks Product and Services

9.6.4 Taiwan Mask Corporation Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Taiwan Mask Corporation Recent Developments/Updates

- 9.6.6 Taiwan Mask Corporation Competitive Strengths & Weaknesses
- 9.7 PDMC Technology Corporation
 - 9.7.1 PDMC Technology Corporation Details
 - 9.7.2 PDMC Technology Corporation Major Business
 - 9.7.3 PDMC Technology Corporation Binary Masks Product and Services
 - 9.7.4 PDMC Technology Corporation Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 PDMC Technology Corporation Recent Developments/Updates
 - 9.7.6 PDMC Technology Corporation Competitive Strengths & Weaknesses
- 9.8 Shenzhen Qingyi Photomask Limited
 - 9.8.1 Shenzhen Qingyi Photomask Limited Details
 - 9.8.2 Shenzhen Qingyi Photomask Limited Major Business
 - 9.8.3 Shenzhen Qingyi Photomask Limited Binary Masks Product and Services
 - 9.8.4 Shenzhen Qingyi Photomask Limited Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Shenzhen Qingyi Photomask Limited Recent Developments/Updates
 - 9.8.6 Shenzhen Qingyi Photomask Limited Competitive Strengths & Weaknesses
- 9.9 Shenzhen Longtu Photomask Co., Ltd.
 - 9.9.1 Shenzhen Longtu Photomask Co., Ltd. Details
 - 9.9.2 Shenzhen Longtu Photomask Co., Ltd. Major Business
 - 9.9.3 Shenzhen Longtu Photomask Co., Ltd. Binary Masks Product and Services
 - 9.9.4 Shenzhen Longtu Photomask Co., Ltd. Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Shenzhen Longtu Photomask Co., Ltd. Recent Developments/Updates
 - 9.9.6 Shenzhen Longtu Photomask Co., Ltd. Competitive Strengths & Weaknesses
- 9.10 SK-Electronics Co., Ltd.
 - 9.10.1 SK-Electronics Co., Ltd. Details
 - 9.10.2 SK-Electronics Co., Ltd. Major Business
 - 9.10.3 SK-Electronics Co., Ltd. Binary Masks Product and Services
 - 9.10.4 SK-Electronics Co., Ltd. Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 SK-Electronics Co., Ltd. Recent Developments/Updates
 - 9.10.6 SK-Electronics Co., Ltd. Competitive Strengths & Weaknesses
- 9.11 Shineisha Co., Ltd.
 - 9.11.1 Shineisha Co., Ltd. Details
 - 9.11.2 Shineisha Co., Ltd. Major Business
 - 9.11.3 Shineisha Co., Ltd. Binary Masks Product and Services
 - 9.11.4 Shineisha Co., Ltd. Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.11.5 Shineisha Co., Ltd. Recent Developments/Updates
- 9.11.6 Shineisha Co., Ltd. Competitive Strengths & Weaknesses
- 9.12 Mitani Micronics Co., Ltd.
- 9.12.1 Mitani Micronics Co., Ltd. Details
- 9.12.2 Mitani Micronics Co., Ltd. Major Business
- 9.12.3 Mitani Micronics Co., Ltd. Binary Masks Product and Services
- 9.12.4 Mitani Micronics Co., Ltd. Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 Mitani Micronics Co., Ltd. Recent Developments/Updates
- 9.12.6 Mitani Micronics Co., Ltd. Competitive Strengths & Weaknesses
- 9.13 Micro Image Co., Ltd.
- 9.13.1 Micro Image Co., Ltd. Details
- 9.13.2 Micro Image Co., Ltd. Major Business
- 9.13.3 Micro Image Co., Ltd. Binary Masks Product and Services
- 9.13.4 Micro Image Co., Ltd. Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.13.5 Micro Image Co., Ltd. Recent Developments/Updates
- 9.13.6 Micro Image Co., Ltd. Competitive Strengths & Weaknesses
- 9.14 MacDermid Alpha Electronics Solutions
- 9.14.1 MacDermid Alpha Electronics Solutions Details
- 9.14.2 MacDermid Alpha Electronics Solutions Major Business
- 9.14.3 MacDermid Alpha Electronics Solutions Binary Masks Product and Services
- 9.14.4 MacDermid Alpha Electronics Solutions Binary Masks Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.14.5 MacDermid Alpha Electronics Solutions Recent Developments/Updates
- 9.14.6 MacDermid Alpha Electronics Solutions Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Binary Masks Industry Chain
- 10.2 Binary Masks Upstream Analysis
 - 10.2.1 Binary Masks Core Raw Materials
 - 10.2.2 Main Manufacturers of Binary Masks Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Binary Masks Production Mode
- 10.6 Binary Masks Procurement Model
- 10.7 Binary Masks Industry Sales Model and Sales Channels
 - 10.7.1 Binary Masks Sales Model

10.7.2 Binary Masks Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Binary Masks Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Binary Masks Production Value by Region (2021-2026) & (USD Million)

Table 3. World Binary Masks Production Value by Region (2027-2032) & (USD Million)

Table 4. World Binary Masks Production Value Market Share by Region (2021-2026)

Table 5. World Binary Masks Production Value Market Share by Region (2027-2032)

Table 6. World Binary Masks Production by Region (2021-2026) & (K Pcs)

Table 7. World Binary Masks Production by Region (2027-2032) & (K Pcs)

Table 8. World Binary Masks Production Market Share by Region (2021-2026)

Table 9. World Binary Masks Production Market Share by Region (2027-2032)

Table 10. World Binary Masks Average Price by Region (2021-2026) & (US\$/Pcs)

Table 11. World Binary Masks Average Price by Region (2027-2032) & (US\$/Pcs)

Table 12. Binary Masks Major Market Trends

Table 13. World Binary Masks Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Pcs)

Table 14. World Binary Masks Consumption by Region (2021-2026) & (K Pcs)

Table 15. World Binary Masks Consumption Forecast by Region (2027-2032) & (K Pcs)

Table 16. World Binary Masks Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Binary Masks Producers in 2025

Table 18. World Binary Masks Production by Manufacturer (2021-2026) & (K Pcs)

Table 19. Production Market Share of Key Binary Masks Producers in 2025

Table 20. World Binary Masks Average Price by Manufacturer (2021-2026) & (US\$/Pcs)

Table 21. Global Binary Masks Company Evaluation Quadrant

Table 22. World Binary Masks Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Binary Masks Production Site of Key Manufacturer

Table 24. Binary Masks Market: Company Product Type Footprint

Table 25. Binary Masks Market: Company Product Application Footprint

Table 26. Binary Masks Competitive Factors

Table 27. Binary Masks New Entrant and Capacity Expansion Plans

Table 28. Binary Masks Mergers & Acquisitions Activity

Table 29. United States VS China Binary Masks Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Binary Masks Production Comparison, (2021 & 2025

& 2032) & (K Pcs)

Table 31. United States VS China Binary Masks Consumption Comparison, (2021 & 2025 & 2032) & (K Pcs)

Table 32. United States Based Binary Masks Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Binary Masks Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Binary Masks Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Binary Masks Production (2021-2026) & (K Pcs)

Table 36. United States Based Manufacturers Binary Masks Production Market Share (2021-2026)

Table 37. China Based Binary Masks Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Binary Masks Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Binary Masks Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Binary Masks Production, (2021-2026) & (K Pcs)

Table 41. China Based Manufacturers Binary Masks Production Market Share (2021-2026)

Table 42. Rest of World Based Binary Masks Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Binary Masks Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Binary Masks Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Binary Masks Production, (2021-2026) & (K Pcs)

Table 46. Rest of World Based Manufacturers Binary Masks Production Market Share (2021-2026)

Table 47. World Binary Masks Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Binary Masks Production by Type (2021-2026) & (K Pcs)

Table 49. World Binary Masks Production by Type (2027-2032) & (K Pcs)

Table 50. World Binary Masks Production Value by Type (2021-2026) & (USD Million)

Table 51. World Binary Masks Production Value by Type (2027-2032) & (USD Million)

Table 52. World Binary Masks Average Price by Type (2021-2026) & (US\$/Pcs)

Table 53. World Binary Masks Average Price by Type (2027-2032) & (US\$/Pcs)

Table 54. World Binary Masks Production Value by Substrate Material, (USD Million), 2021 & 2025 & 2032

Table 55. World Binary Masks Production by Substrate Material (2021-2026) & (K Pcs)

Table 56. World Binary Masks Production by Substrate Material (2027-2032) & (K Pcs)

Table 57. World Binary Masks Production Value by Substrate Material (2021-2026) & (USD Million)

Table 58. World Binary Masks Production Value by Substrate Material (2027-2032) & (USD Million)

Table 59. World Binary Masks Average Price by Substrate Material (2021-2026) & (US\$/Pcs)

Table 60. World Binary Masks Average Price by Substrate Material (2027-2032) & (US\$/Pcs)

Table 61. World Binary Masks Production Value by Mask Format And Transfer Ratio, (USD Million), 2021 & 2025 & 2032

Table 62. World Binary Masks Production by Mask Format And Transfer Ratio (2021-2026) & (K Pcs)

Table 63. World Binary Masks Production by Mask Format And Transfer Ratio (2027-2032) & (K Pcs)

Table 64. World Binary Masks Production Value by Mask Format And Transfer Ratio (2021-2026) & (USD Million)

Table 65. World Binary Masks Production Value by Mask Format And Transfer Ratio (2027-2032) & (USD Million)

Table 66. World Binary Masks Average Price by Mask Format And Transfer Ratio (2021-2026) & (US\$/Pcs)

Table 67. World Binary Masks Average Price by Mask Format And Transfer Ratio (2027-2032) & (US\$/Pcs)

Table 68. World Binary Masks Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Binary Masks Production by Application (2021-2026) & (K Pcs)

Table 70. World Binary Masks Production by Application (2027-2032) & (K Pcs)

Table 71. World Binary Masks Production Value by Application (2021-2026) & (USD Million)

Table 72. World Binary Masks Production Value by Application (2027-2032) & (USD Million)

Table 73. World Binary Masks Average Price by Application (2021-2026) & (US\$/Pcs)

Table 74. World Binary Masks Average Price by Application (2027-2032) & (US\$/Pcs)

Table 75. Photonics Basic Information, Manufacturing Base and Competitors

Table 76. Photonics Major Business

Table 77. Photronics Binary Masks Product and Services

Table 78. Photronics Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Photronics Recent Developments/Updates

Table 80. Photronics Competitive Strengths & Weaknesses

Table 81. DNP Basic Information, Manufacturing Base and Competitors

Table 82. DNP Major Business

Table 83. DNP Binary Masks Product and Services

Table 84. DNP Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. DNP Recent Developments/Updates

Table 86. DNP Competitive Strengths & Weaknesses

Table 87. Toppan Basic Information, Manufacturing Base and Competitors

Table 88. Toppan Major Business

Table 89. Toppan Binary Masks Product and Services

Table 90. Toppan Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Toppan Recent Developments/Updates

Table 92. Toppan Competitive Strengths & Weaknesses

Table 93. HOYA Basic Information, Manufacturing Base and Competitors

Table 94. HOYA Major Business

Table 95. HOYA Binary Masks Product and Services

Table 96. HOYA Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. HOYA Recent Developments/Updates

Table 98. HOYA Competitive Strengths & Weaknesses

Table 99. China Resources Microelectronics Basic Information, Manufacturing Base and Competitors

Table 100. China Resources Microelectronics Major Business

Table 101. China Resources Microelectronics Binary Masks Product and Services

Table 102. China Resources Microelectronics Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. China Resources Microelectronics Recent Developments/Updates

Table 104. China Resources Microelectronics Competitive Strengths & Weaknesses

Table 105. Taiwan Mask Corporation Basic Information, Manufacturing Base and Competitors

Table 106. Taiwan Mask Corporation Major Business

Table 107. Taiwan Mask Corporation Binary Masks Product and Services

Table 108. Taiwan Mask Corporation Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Taiwan Mask Corporation Recent Developments/Updates

Table 110. Taiwan Mask Corporation Competitive Strengths & Weaknesses

Table 111. PDMC Technology Corporation Basic Information, Manufacturing Base and Competitors

Table 112. PDMC Technology Corporation Major Business

Table 113. PDMC Technology Corporation Binary Masks Product and Services

Table 114. PDMC Technology Corporation Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. PDMC Technology Corporation Recent Developments/Updates

Table 116. PDMC Technology Corporation Competitive Strengths & Weaknesses

Table 117. Shenzhen Qingyi Photomask Limited Basic Information, Manufacturing Base and Competitors

Table 118. Shenzhen Qingyi Photomask Limited Major Business

Table 119. Shenzhen Qingyi Photomask Limited Binary Masks Product and Services

Table 120. Shenzhen Qingyi Photomask Limited Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Shenzhen Qingyi Photomask Limited Recent Developments/Updates

Table 122. Shenzhen Qingyi Photomask Limited Competitive Strengths & Weaknesses

Table 123. Shenzhen Longtu Photomask Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 124. Shenzhen Longtu Photomask Co., Ltd. Major Business

Table 125. Shenzhen Longtu Photomask Co., Ltd. Binary Masks Product and Services

Table 126. Shenzhen Longtu Photomask Co., Ltd. Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Shenzhen Longtu Photomask Co., Ltd. Recent Developments/Updates

Table 128. Shenzhen Longtu Photomask Co., Ltd. Competitive Strengths & Weaknesses

Table 129. SK-Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 130. SK-Electronics Co., Ltd. Major Business

Table 131. SK-Electronics Co., Ltd. Binary Masks Product and Services

Table 132. SK-Electronics Co., Ltd. Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133.	SK-Electronics Co., Ltd. Recent Developments/Updates
Table 134.	SK-Electronics Co., Ltd. Competitive Strengths & Weaknesses
Table 135.	Shineisha Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 136.	Shineisha Co., Ltd. Major Business
Table 137.	Shineisha Co., Ltd. Binary Masks Product and Services
Table 138.	Shineisha Co., Ltd. Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139.	Shineisha Co., Ltd. Recent Developments/Updates
Table 140.	Shineisha Co., Ltd. Competitive Strengths & Weaknesses
Table 141.	Mitani Micronics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 142.	Mitani Micronics Co., Ltd. Major Business
Table 143.	Mitani Micronics Co., Ltd. Binary Masks Product and Services
Table 144.	Mitani Micronics Co., Ltd. Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145.	Mitani Micronics Co., Ltd. Recent Developments/Updates
Table 146.	Mitani Micronics Co., Ltd. Competitive Strengths & Weaknesses
Table 147.	Micro Image Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 148.	Micro Image Co., Ltd. Major Business
Table 149.	Micro Image Co., Ltd. Binary Masks Product and Services
Table 150.	Micro Image Co., Ltd. Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151.	Micro Image Co., Ltd. Recent Developments/Updates
Table 152.	Micro Image Co., Ltd. Competitive Strengths & Weaknesses
Table 153.	MacDermid Alpha Electronics Solutions Basic Information, Manufacturing Base and Competitors
Table 154.	MacDermid Alpha Electronics Solutions Major Business
Table 155.	MacDermid Alpha Electronics Solutions Binary Masks Product and Services
Table 156.	MacDermid Alpha Electronics Solutions Binary Masks Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157.	MacDermid Alpha Electronics Solutions Recent Developments/Updates
Table 158.	MacDermid Alpha Electronics Solutions Competitive Strengths & Weaknesses
Table 159.	Global Key Players of Binary Masks Upstream (Raw Materials)
Table 160.	Global Binary Masks Typical Customers
Table 161.	Binary Masks Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Binary Masks Picture

Figure 2. World Binary Masks Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Binary Masks Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Binary Masks Production (2021-2032) & (K Pcs)

Figure 5. World Binary Masks Average Price (2021-2032) & (US\$/Pcs)

Figure 6. World Binary Masks Production Value Market Share by Region (2021-2032)

Figure 7. World Binary Masks Production Market Share by Region (2021-2032)

Figure 8. North America Binary Masks Production (2021-2032) & (K Pcs)

Figure 9. Europe Binary Masks Production (2021-2032) & (K Pcs)

Figure 10. China Binary Masks Production (2021-2032) & (K Pcs)

Figure 11. Japan Binary Masks Production (2021-2032) & (K Pcs)

Figure 12. South Korea Binary Masks Production (2021-2032) & (K Pcs)

Figure 13. China Taiwan Binary Masks Production (2021-2032) & (K Pcs)

Figure 14. Binary Masks Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 17. World Binary Masks Consumption Market Share by Region (2021-2032)

Figure 18. United States Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 19. China Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 20. Europe Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 21. Japan Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 22. South Korea Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 23. ASEAN Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 24. India Binary Masks Consumption (2021-2032) & (K Pcs)

Figure 25. Producer Shipments of Binary Masks by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Binary Masks Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Binary Masks Markets in 2025

Figure 28. United States VS China: Binary Masks Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Binary Masks Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Binary Masks Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Binary Masks Production Market Share 2025

Figure 32. China Based Manufacturers Binary Masks Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Binary Masks Production Market Share 2025

Figure 34. World Binary Masks Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Binary Masks Production Value Market Share by Type in 2025

Figure 36. 4"x4"

Figure 37. 6"x6"

Figure 38. 9"x9"

Figure 39. 24"x30"

Figure 40. World Binary Masks Production Market Share by Type (2021-2032)

Figure 41. World Binary Masks Production Value Market Share by Type (2021-2032)

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

Figure 43. World Binary Masks Production Value by Substrate Material, (USD Million), 2021 & 2025 & 2032

Figure 44. World Binary Masks Production Value Market Share by Substrate Material in 2025

Figure 45. Quartz Substrate

Figure 46. Soda Lime Glass Substrate

Figure 47. Specialty Glass Substrate

Figure 48. World Binary Masks Production Market Share by Substrate Material (2021-2032)

Figure 49. World Binary Masks Production Value Market Share by Substrate Material (2021-2032)

Figure 50. World Binary Masks Average Price by Substrate Material (2021-2032) & (US\$/Pcs)

Figure 51. World Binary Masks Production Value by Mask Format And Transfer Ratio, (USD Million), 2021 & 2025 & 2032

Figure 52. World Binary Masks Production Value Market Share by Mask Format And Transfer Ratio in 2025

Figure 53. 1X Master Photomask

Figure 54. Copy Mask

Figure 55. Reduction Reticle

Figure 56. World Binary Masks Production Market Share by Mask Format And Transfer Ratio (2021-2032)

Figure 57. World Binary Masks Production Value Market Share by Mask Format And Transfer Ratio (2021-2032)

Figure 58. World Binary Masks Average Price by Mask Format And Transfer Ratio (2021-2032) & (US\$/Pcs)

Figure 59. World Binary Masks Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World Binary Masks Production Value Market Share by Application in 2025

Figure 61. Integrated Circuit Manufacturing

Figure 62. Flat Panel Display Manufacturing

Figure 63. MEMS Manufacturing

Figure 64. Photonic Device Manufacturing

Figure 65. World Binary Masks Production Market Share by Application (2021-2032)

Figure 66. World Binary Masks Production Value Market Share by Application (2021-2032)

Figure 67. World Binary Masks Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 68. Binary Masks Industry Chain

Figure 69. Binary Masks Procurement Model

Figure 70. Binary Masks Sales Model

Figure 71. Binary Masks Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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