

Global Mask Blanks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mask Blanks market size is expected to reach \$ 5272 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

In 2025, the global production of photomask substrates (also known as photomask blanks) will reach 306,500 square meters, with an average price of approximately US\$10,514 per square meter.

Mask Blanks 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. Mask blanks possess key characteristics such as ultra-high flatness, extremely low defect rate, and high light transmittance. They are ideal photosensitive blanks for fabricating fine photomask patterns, obtained through multiple processes including coating and adhesive application from materials such as quartz/soda glass. Downstream users primarily include photomask manufacturers, wafer fabs, and display panel manufacturers.

Global key players of Mask Blanks include Shin-Etsu MicroSi, Inc., HOYA, AGC, S&S Tech and ULCOAT. The top five players hold a share over 93%. In terms of product, low reflectance chrome-film mask blanks are the largest segment, with a share about 66%. And in terms of application, the largest application is Semiconductor, with a share about 82%.

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 Phihua 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 blanks, with substrate sizes expanding from 1m²1m in Generation 5 to 3m²3m in 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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