

Global Phase Shift Masks (PSM) 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 Phase Shift Masks (PSM) market size was valued at US\$ 1204 million in 2025 and is forecast to a readjusted size of US\$ 1892 million by 2032 with a CAGR of 6.6% during review period.

Phase shift masks are high-end mask products used in advanced lithography. Their core function is not merely to block light, but to intentionally modify the phase and intensity distribution of transmitted or reflected light by introducing localized differences in refractive index, transmittance, or structural features on the mask, thereby improving patterning resolution, edge contrast, and depth of focus and addressing the narrowing process window and rising yield-control difficulty in advanced semiconductor and high-definition display manufacturing. In semiconductor applications, Photronics applies embedded attenuated phase-shift masks at 248 nm and 193 nm wavelengths and uses a 6% transmission MoSiON absorber to generate a 180-degree phase shift, supported by dry etch, defect repair, and AIMS verification for advanced processes. In display applications, SK-Electronics and Photronics both combine phase-shift technology with half-tone, multi-tone, or double-layer masks to reduce the number of exposures, shorten panel manufacturing flows, improve display quality, and support large glass substrates and high-generation production lines. At the same time, HOYA and S&S Tech provide blank masks suited to phase-shift masks and high-NA EUV, meaning that upstream blank materials and downstream finished photomasks together form the supply structure of this segment. Typical customers include wafer fabs, IDMs, mask shops, panel manufacturers, and certain electronic device makers. Delivery formats include not only one-time custom mask supply, but also supporting services such as cleaning, recertification, and data-linked order collaboration. In essence, the PSM industry is a specialized photomask segment jointly driven by high-precision materials,

microfabrication, phase-control design, defect management, and coordinated customer delivery.

The essence of the phase shift mask industry is that it turns optical phase control capability into a manufacturable, scalable, and verifiable high-precision product on top of the traditional photomask platform. Its competitiveness therefore does not come only from pattern writing accuracy, but from the combination of materials systems, phase-structure design, etch and cleaning processes, defect repair, metrology verification, and collaborative customer development. Photronics states that embedded attenuated phase-shift masks are already used at 248 nm and 193 nm wavelengths and employ a 6% transmission MoSiON absorber to generate a 180-degree phase shift, thereby improving resolution and depth of focus. SK-Electronics shows from the display side that phase-shift technology not only improves resolution, but can also reduce exposure counts and optimize panel processing through multi-tone and half-tone concepts. Looking further upstream, the phase-shifting blank masks provided by HOYA and S&S Tech indicate that the real barrier in this industry is not a single product point, but a continuous technology chain extending from blank materials to finished masks. Accordingly, PSM is not merely an upgraded version of an ordinary mask, but a systematic product in the advanced lithography era that connects materials, fabrication, metrology, and application validation, and its value is likely to continue expanding as linewidths shrink, display complexity rises, and new process technologies are introduced.

From an industry-structure perspective, phase shift masks are a highly concentrated niche with high qualification thresholds and strong customer lock-in. Japanese companies such as DNP, TOPPAN, HOYA, and SK-Electronics have long cultivated photomasks and related materials, building deep capabilities from precision processing to customer collaboration. DNP explicitly states that it supplies world-class products supporting semiconductor manufacturing, while TOPPAN continues to develop phase shift masks and photomasks for next-generation exposure technologies. At the same time, Photronics in the United States represents a more service-oriented merchant model that goes beyond mask delivery to include recertification, cleaning, data standardization, and online collaborative ordering, making it easier for customers to maintain lead time and yield through multi-site manufacturing and complex process introductions. Companies in Mainland China remain more focused on acceleration and local substitution, with the China Resources Microelectronics system having already disclosed an advanced mask line and incorporated PSM, OPC, and dry-etch capabilities into its manufacturing roadmap. This suggests that future competition will not be driven primarily by the price of a single mask, but rather by who can more reliably provide

advanced blanks, sophisticated structures, fast delivery, and sustained support.

Looking ahead, the outlook for phase shift masks remains structurally positive. First, the advance of semiconductor process technology is far from over. HOYA clearly notes continuing demand for mask blanks suited to phase-shifting masks and high-NA EUV lithography, while TOPPAN is advancing EUV photomask solutions that reduce peripheral reflection and improve dimensional stability. Second, the display market is not a mature stagnant market. HOYA explicitly states that Chinese manufacturers are leading growth in FPD-related demand, that smartphones remain the largest application, and that automotive and wearable devices are expanding their share. Third, policy frameworks are creating additional room for localization and supply-chain buildout. The U.S. CHIPS program provides large-scale semiconductor manufacturing incentives, the European Chips Act is designed to reinforce the local ecosystem and reduce external dependencies, and Chinese local industrial policy explicitly supports photomasks as a key category of advanced semiconductor manufacturing materials. Taken together, as long as global fab expansion continues, advanced logic and high-performance computing keep moving forward, and higher-generation displays and new terminal devices remain on an upgrade path, both PSM and upstream blank masks are well positioned to benefit. The industry's prosperity is therefore more likely to be expressed through structural upgrading than through pure volume expansion alone.

This report is a detailed and comprehensive analysis for global Phase Shift Masks (PSM) 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 Phase Shift Masks (PSM) market size and forecasts, in consumption value (\$ Million), sales quantity (Million Pcs), and average selling prices (US\$/Pcs), 2021-2032

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

Global Phase Shift Masks (PSM) market size and forecasts, by Type and by

Application, in consumption value (\$ Million), sales quantity (Million Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Phase Shift Masks (PSM) market shares of main players, shipments in revenue (\$ Million), sales quantity (Million 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 Phase Shift Masks (PSM)

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 Phase Shift Masks (PSM) 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, SK-Electronics Co., Ltd., S&S Tech Corporation, etc.

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

Market Segmentation

Phase Shift Masks (PSM) 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

Halftone Mask (Attenuated PSM)

Levenson Mask (Alternating PSM)

RimPSM

Sub ResolutionPSM

Self-alignmentPSM

Chrome-lessPSM /All -transparent PSM

Complex PSM

Market segment by Product Level

Phase-Shift Blank Mask

Finished Phase-Shift Photomask

Market segment by Phase-Shift Method

Attenuated Phase-Shift Mask

Alternating Phase-Shift Mask

Other Phase-Shift Structures

Market segment by Application

Semiconductor Integrated Circuit Manufacturing

Flat Panel Display Manufacturing

Power and Discrete Device Manufacturing

MEMS and Sensor Manufacturing

Optoelectronic and Compound Semiconductor Manufacturing

Research and Process Development

Major players covered

Photronics

DNP

Toppan

HOYA

China Resources Microelectronics

SK-Electronics Co., Ltd.

S&S Tech Corporation

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 Phase Shift Masks (PSM) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Phase Shift Masks (PSM), with price, sales quantity, revenue, and global market share of Phase Shift Masks (PSM) from 2021 to 2026.

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

Chapter 4, the Phase Shift Masks (PSM) 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 Phase Shift Masks (PSM) 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 Phase Shift Masks (PSM).

Chapter 14 and 15, to describe Phase Shift Masks (PSM) sales channel, distributors, customers, research findings and conclusion.

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