

# Global Photomask Blank Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Photomask Blank market size is expected to reach \$ 5218 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

In 2025, the global production volume of photomask substrates (also referred to as mask substrates or photomask blanks) is projected to reach 306,500 square meters, with an average price of approximately \$10,514 per square meter.

A photomask blank is a product consisting of a substrate—primarily composed of quartz or soda-lime glass—upon which a thin film of chromium or molybdenum silicide is deposited. This is followed by the application of a photoresist material sensitive to electron beams or lasers; this coating serves to resist etching processes, thereby enabling the formation of intricate circuit patterns. Mask blanks are characterized by several critical attributes, including ultra-high flatness, extremely low defect rates, and high light transmittance. As the ideal photosensitive blank plate for fabricating fine-resolution photomask patterns, mask blanks are produced through a multi-stage manufacturing process—involving coating, photoresist application, and other steps—applied to base materials such as quartz or soda-lime glass. The primary downstream consumers of mask blanks are photomask manufacturers, wafer fabrication plants (fabs), and display panel manufacturers.

The primary market drivers include the following factors:

Growth in demand within the semiconductor industry.

Expansion of downstream applications.

**5G and AI-driven demand:** The surge in demand for high-performance semiconductors across sectors such as 5G base stations, AI chips, and automotive electronics is driving increased production of chips utilizing 28nm and larger process nodes.

**Upgrades in advanced process nodes:** For process nodes below 28nm (e.g., 7nm and 5nm), the precision requirements for mask blanks have escalated to the nanoscale level; consequently, synthetic quartz substrates have emerged as the preferred choice due to their high light transmittance and low coefficient of thermal expansion.

**Accelerated localization and import substitution:** Domestic enterprises (such as Feilihua and Luwei Optoelectronics) have successfully overcome technological barriers; as a result, the domestic production rate has risen from less than 10% in 2018 to 30% in 2025, with projections indicating it will exceed 50% by 2027. Independent third-party photomask manufacturers are expanding their market share, as wafer fabs increase the outsourcing ratio for mature processes (28nm and above) to 47.3%.

## Upgrading the Display Panel Industry

### Trend toward Larger Screens

**Construction of High-Generation Lines:** The proliferation of panel production lines in G8.6 and higher generations (e.g., G10.5 lines) is driving demand for large-format photomask blanks; substrate dimensions have expanded from 1m × 1m in the G5 generation to 3m × 3m in the G11 generation.

**Technological Iteration:** Emerging display technologies—such as AMOLED, LTPO, and LTPS—are raising the precision requirements for photomask substrates to the sub-micron level, thereby fueling demand for high-end substrates.

### Technological Advancement and Material Innovation

#### Advantages of Synthetic Quartz Substrates

**Superior Performance:** Characterized by high purity (impurity content

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