

Global Photomask Blank 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 Photomask Blank market size was valued at US\$ 3316 million in 2025 and is forecast to a readjusted size of US\$ 5218 million by 2032 with a CAGR of 6.9% during review period.

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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