

# Global External Photomask Market Growth 2026-2032

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## Abstracts

The global External Photomask market size is predicted to grow from US\$ 4170 million in 2025 to US\$ 6607 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

External photomask (also called merchant photomask) refers to a photomask that is independently designed, manufactured, and supplied to downstream customers such as wafer fabs, display panel manufacturers, and PCB factories by professional third - party specialized vendors, rather than being self - produced by integrated device manufacturers (IDMs) or wafer fabs for exclusive internal use. It is a core carrier for pattern transfer in the photolithography process, mainly used in the manufacturing of semiconductors, displays, PCBs, MEMS, and other products, and is an indispensable key component for the mass production of precision electronic devices. Low-end soda-lime glass photomasks cost hundreds of USD per piece; mainstream quartz photomasks range from thousands to tens of thousands of USD; advanced DUV photomasks reach over 100,000 USD; EUV photomasks exceed 1,000,000 USD per piece. Prices rise exponentially with process precision and substrate specifications. Industrial Chain: Upstream covers high-purity quartz/soda-lime glass blanks, light-shielding films, photoresists, and e-beam writing/inspection equipment. Midstream includes third-party manufacturing and in-house production by fabs. Downstream serves semiconductors, display panels, PCBs, MEMS and other fields, with high concentration of core technologies and capacity in upstream materials and midstream leading manufacturers.

## Market Drivers

Cost - effectiveness and resource optimization: The production of photomasks requires huge capital investment in equipment like electron - beam lithography machines and high - end inspection instruments. Third - party suppliers can achieve economies of

scale, reduce the unit cost of photomasks, and help small and medium - sized manufacturers avoid redundant investment and focus on their core manufacturing business.

**Rising demand from advanced semiconductor processes:** The continuous advancement of semiconductor process nodes to 7nm, 5nm, 3nm, and below, along with the wide application of EUV lithography technology, has led to an increasing demand for high - precision, complex - structured photomasks. External photomask vendors, with their professional technical teams and rich experience, can meet the strict technical requirements of advanced processes.

**Booming development of emerging application fields:** The rapid growth of markets such as artificial intelligence (AI), 5G communication, automotive electronics, and high - resolution display panels has driven the expansion of the entire semiconductor and display industry, thereby boosting the demand for external photomasks that match various special - purpose devices.

**Intensified specialization in the industrial chain:** As the manufacturing process of photomasks becomes more complex, the division of labor in the industrial chain is further refined. Wafer fabs are more inclined to outsource photomask production to external professional manufacturers to ensure production efficiency and product quality, which promotes the development of the external photomask market.

**Accelerated localization process:** In many regions, especially in China, the promotion of policies for the localization of the semiconductor industry has provided strong support for the development of local external photomask manufacturers, helping them gradually break through technical barriers and expand the market share.

## Market Challenges

**High technical barriers and complex production processes:** The manufacturing of advanced photomasks, especially EUV photomasks, involves technologies such as ultra - low defect mask blanks, high - precision pattern writing, and complex optical proximity correction (OPC). Mastering these technologies requires long - term R & D accumulation and huge capital investment, which is a major challenge for many external vendors.

**Escalating production and inspection costs:** The cost of producing EUV photomasks is extremely high. The price of a single EUV photomask can reach hundreds of thousands

of US dollars. Meanwhile, the strict defect control requirements in advanced processes have continuously increased the cost of photomask inspection and repair, squeezing the profit margins of manufacturers.

**Intense market competition and high concentration:** The global external photomask market is highly concentrated. International giants like Toppan, DNP, and Photronics have occupied most of the high - end market share by virtue of their technical advantages and stable customer resources. It is difficult for emerging manufacturers to compete with them in the short term.

**Supply chain risks and geopolitical impacts:** The supply of key raw materials (such as high - purity quartz substrates) and core equipment for photomasks is highly concentrated in a few countries and regions. Geopolitical tensions, trade frictions, and other factors may lead to supply disruptions, affecting the stable delivery of external photomasks.

**Shortage of professional talents:** The R & D and production of high - end photomasks require interdisciplinary talents who are proficient in optics, materials, microelectronics, and other fields. The global shortage of such professional talents has restricted the expansion of production capacity and the pace of technological innovation of external photomask manufacturers.

LP Information, Inc. (LPI) ' newest research report, the “External Photomask Industry Forecast” looks at past sales and reviews total world External Photomask sales in 2025, providing a comprehensive analysis by region and market sector of projected External Photomask sales for 2026 through 2032. With External Photomask sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world External Photomask industry.

This Insight Report provides a comprehensive analysis of the global External Photomask landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on External Photomask portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global External Photomask market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for External Photomask and breaks down the forecast by

Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global External Photomask.

This report presents a comprehensive overview, market shares, and growth opportunities of External Photomask market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Quartz Photomask

Soda Lime Glass Photomask

Others

#### Segmentation by Lithography Light Source:

UV Photomask

DUV Photomask

EUV Photomask

Others

#### Segmentation by Process Precision:

Advanced Process Photomask

Mature Process Photomask

Low-end Process Photomask

#### Segmentation by Application:

Semiconductor Chip

Flat Panel Display

Touch Industry

Circuit Board

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Tekscend Photomask

Photronics

DNP

Hoya

SK-Electronics

Taiwan Mask

LG Innotek

ShenZheng QingVi

Newway Photomask

Compugraphics

Nippon Filcon

Shenzhen Longtu Photomask

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global External Photomask market?

What factors are driving External Photomask market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do External Photomask market opportunities vary by end market size?

How does External Photomask break out by Type, by Application?

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