

# Global External Semiconductor Photomask Market Growth 2026-2032

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## Abstracts

The global External Semiconductor Photomask market size is predicted to grow from US\$ 3085 million in 2025 to US\$ 4960 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

External semiconductor photomasks are special photomasks independently designed, R&D and manufactured by professional third-party photomask vendors, and commercially supplied to semiconductor manufacturers such as wafer fabs and IDMs. As the core component for precise circuit pattern transfer in semiconductor lithography processes, they are distinguished from in-house semiconductor photomasks independently produced and used only for internal manufacturing by semiconductor enterprises. They are mainly adapted to the production of various semiconductor devices including logic chips, memory chips, power semiconductors, RF chips and MEMS devices, covering the full technical nodes of mature and advanced semiconductor processes. Mature process models cost thousands to tens of thousands of USD; advanced DUV photomasks exceed 100,000 USD per unit; EUV photomasks for cutting-edge nodes surge over 1,000,000 USD, with prices rising exponentially by process precision and defect control standards. Industrial Chain: Upstream: high-purity quartz blanks, MoSi/Chrome films, e-beam writers and high-precision inspection equipment. Midstream: leading third-party manufacturers and in-house fab production. Downstream: logic/memory chips, power semiconductors, RF chips and MEMS devices, with core technologies and capacity concentrated in upstream international suppliers and midstream top manufacturers.

## Market Drivers

Cost and efficiency optimization demands of semiconductor enterprises: The production

of semiconductor photomasks requires huge investment in ultra-high-end equipment such as e-beam writers and high-precision inspection instruments with extremely high capital and technical thresholds. The third-party supply model helps semiconductor enterprises avoid redundant equipment investment, reduce the mask supporting cost per chip by virtue of the vendors' economies of scale, and focus on core manufacturing and process R&D.

**Capacity and category expansion of the semiconductor industry:** The booming development of global AI, computing power, automotive electronics and the Internet of Things drives the sustained surge in demand for semiconductor chips. The capacity expansion of wafer fabs and the diversification of chip categories boost the overall demand for semiconductor photomasks. Small and medium-sized wafer fabs and specialty process foundries lack in-house manufacturing capabilities, becoming the core demand entities for external semiconductor photomasks.

**Technological iteration of advanced semiconductor processes:** The continuous evolution of logic and memory chips to advanced processes such as 3nm/2nm leads to a sharp increase in demand for high-precision, low-defect semiconductor photomasks with optical proximity correction (OPC). Leading third-party vendors can quickly meet the stringent technical requirements of advanced processes by virtue of long-term technical accumulation, making up for the technical shortcomings of some semiconductor enterprises.

**Deepened specialized division of the semiconductor industry chain:** Semiconductor manufacturing processes are becoming increasingly complex, and the lithography link has higher requirements for the customization and timeliness of photomasks. Wafer fabs tend to outsource the photomask link to professional third parties to realize efficient supply chain collaboration and improve the overall yield and delivery efficiency of chip production.

**Global promotion of localized semiconductor layout:** Countries around the world are accelerating the construction of semiconductor industry chain autonomy. The construction of local wafer fabs drives the release of demand for local external semiconductor photomasks. Meanwhile, policy support for local third-party photomask enterprises to achieve technological breakthroughs further improves the supporting capacity of regional semiconductor supply chains.

## Market Challenges

Extremely high technical barriers for advanced processes: The manufacturing of external semiconductor photomasks for advanced processes (especially DUV/EUV photomasks for 7nm and below nodes) involves core technologies such as high-purity quartz blanks, ultra-precision pattern fabrication, phase shift mask (PSM) technology and EUV reflective layer preparation, which require long-term R&D accumulation and continuous large capital investment, making it difficult for small and medium-sized third-party vendors to achieve technological breakthroughs.

High supply chain dependence and prominent risks: The core raw materials (high-purity quartz blanks, MoSi light-shielding films) and core production equipment (high-end e-beam writers) for advanced external semiconductor photomasks are mostly monopolized by a small number of international enterprises. Geopolitical frictions and trade barriers are likely to cause supply disruptions of raw materials and equipment, affecting the stable production of vendors.

High market concentration and solidified competition pattern: The global external semiconductor photomask market is dominated by international leading enterprises such as Toppan, DNP and Photronics, which occupy most of the market share of advanced processes and form long-term stable cooperation with leading semiconductor enterprises such as TSMC, Samsung and Intel. Emerging third-party vendors are difficult to break through the dual barriers of technology and customers.

Stringent product customization and quality control requirements: Different semiconductor devices and process nodes have significant differences in the pattern design, precision and specification requirements of photomasks, requiring vendors to provide highly customized solutions. At the same time, semiconductor manufacturing requires nanoscale defect rates for photomasks, which greatly increases the costs of production, inspection and repair, squeezing the profit margins of vendors.

Long cycle of technical verification and customer certification: As a key core component of chip manufacturing, external semiconductor photomasks need to pass stringent technical verification and product certification to enter the supply chain of wafer fabs, with a cycle usually lasting 1-3 years. It is difficult for emerging third-party vendors to achieve rapid customer breakthrough and market volume release.

LP Information, Inc. (LPI) ' newest research report, the "External Semiconductor Photomask Industry Forecast" looks at past sales and reviews total world External Semiconductor Photomask sales in 2025, providing a comprehensive analysis by region and market sector of projected External Semiconductor Photomask sales for 2026

through 2032. With External Semiconductor Photomask sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world External Semiconductor Photomask industry.

This Insight Report provides a comprehensive analysis of the global External Semiconductor 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 Semiconductor Photomask portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global External Semiconductor Photomask market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for External Semiconductor 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 Semiconductor Photomask.

This report presents a comprehensive overview, market shares, and growth opportunities of External Semiconductor 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:

Logic Chips

Memory Chips

Power Semiconductors

RF Chips

MEMS Devices

Others

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

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 Semiconductor Photomask market?

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

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

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

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

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global External Semiconductor Photomask Annual Sales 2021-2032

- 2.1.2 World Current & Future Analysis for External Semiconductor Photomask by Geographic Region, 2021, 2025 & 2032

- 2.1.3 World Current & Future Analysis for External Semiconductor Photomask by Country/Region, 2021, 2025 & 2032

#### 2.2 External Semiconductor Photomask Segment by Type

- 2.2.1 Quartz Photomask

- 2.2.2 Soda Lime Glass Photomask

- 2.2.3 Others

- 2.2.4 External Semiconductor Photomask Sales by Type

- 2.2.4.1 Global External Semiconductor Photomask Sales Market Share by Type (2021-2026)

- 2.2.4.2 Global External Semiconductor Photomask Revenue and Market Share by Type (2021-2026)

- 2.2.4.3 Global External Semiconductor Photomask Sale Price by Type (2021-2026)

#### 2.3 External Semiconductor Photomask Segment by Lithography Light Source

- 2.3.1 UV Photomask

- 2.3.2 DUV Photomask

- 2.3.3 EUV Photomask

- 2.3.4 Others

- 2.3.5 External Semiconductor Photomask Sales by Lithography Light Source

- 2.3.5.1 Global External Semiconductor Photomask Sales Market Share by Lithography Light Source (2021-2026)

2.3.5.2 Global External Semiconductor Photomask Revenue and Market Share by Lithography Light Source (2021-2026)

2.3.5.3 Global External Semiconductor Photomask Sale Price by Lithography Light Source (2021-2026)

2.4 External Semiconductor Photomask Segment by Process Precision

2.4.1 Advanced Process Photomask

2.4.2 Mature Process Photomask

2.4.3 Low-end Process Photomask

2.4.4 External Semiconductor Photomask Sales by Process Precision

2.4.4.1 Global External Semiconductor Photomask Sales Market Share by Process Precision (2021-2026)

2.4.4.2 Global External Semiconductor Photomask Revenue and Market Share by Process Precision (2021-2026)

2.4.4.3 Global External Semiconductor Photomask Sale Price by Process Precision (2021-2026)

2.5 External Semiconductor Photomask Segment by Application

2.5.1 Logic Chips

2.5.2 Memory Chips

2.5.3 Power Semiconductors

2.5.4 RF Chips

2.5.5 MEMS Devices

2.5.6 Others

2.5.7 External Semiconductor Photomask Sales by Application

2.5.7.1 Global External Semiconductor Photomask Sale Market Share by Application (2021-2026)

2.5.7.2 Global External Semiconductor Photomask Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global External Semiconductor Photomask Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global External Semiconductor Photomask Breakdown Data by Company

3.1.1 Global External Semiconductor Photomask Annual Sales by Company (2021-2026)

3.1.2 Global External Semiconductor Photomask Sales Market Share by Company (2021-2026)

3.2 Global External Semiconductor Photomask Annual Revenue by Company (2021-2026)

- 3.2.1 Global External Semiconductor Photomask Revenue by Company (2021-2026)
- 3.2.2 Global External Semiconductor Photomask Revenue Market Share by Company (2021-2026)
- 3.3 Global External Semiconductor Photomask Sale Price by Company
- 3.4 Key Manufacturers External Semiconductor Photomask Producing Area Distribution, Sales Area, Product Type
  - 3.4.1 Key Manufacturers External Semiconductor Photomask Product Location Distribution
  - 3.4.2 Players External Semiconductor Photomask Products Offered
- 3.5 Market Concentration Rate Analysis
  - 3.5.1 Competition Landscape Analysis
  - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

## **4 WORLD HISTORIC REVIEW FOR EXTERNAL SEMICONDUCTOR PHOTOMASK BY GEOGRAPHIC REGION**

- 4.1 World Historic External Semiconductor Photomask Market Size by Geographic Region (2021-2026)
  - 4.1.1 Global External Semiconductor Photomask Annual Sales by Geographic Region (2021-2026)
  - 4.1.2 Global External Semiconductor Photomask Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic External Semiconductor Photomask Market Size by Country/Region (2021-2026)
  - 4.2.1 Global External Semiconductor Photomask Annual Sales by Country/Region (2021-2026)
  - 4.2.2 Global External Semiconductor Photomask Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas External Semiconductor Photomask Sales Growth
- 4.4 APAC External Semiconductor Photomask Sales Growth
- 4.5 Europe External Semiconductor Photomask Sales Growth
- 4.6 Middle East & Africa External Semiconductor Photomask Sales Growth

## **5 AMERICAS**

- 5.1 Americas External Semiconductor Photomask Sales by Country
  - 5.1.1 Americas External Semiconductor Photomask Sales by Country (2021-2026)

- 5.1.2 Americas External Semiconductor Photomask Revenue by Country (2021-2026)
- 5.2 Americas External Semiconductor Photomask Sales by Type (2021-2026)
- 5.3 Americas External Semiconductor Photomask Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC External Semiconductor Photomask Sales by Region
  - 6.1.1 APAC External Semiconductor Photomask Sales by Region (2021-2026)
  - 6.1.2 APAC External Semiconductor Photomask Revenue by Region (2021-2026)
- 6.2 APAC External Semiconductor Photomask Sales by Type (2021-2026)
- 6.3 APAC External Semiconductor Photomask Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

## **7 EUROPE**

- 7.1 Europe External Semiconductor Photomask by Country
  - 7.1.1 Europe External Semiconductor Photomask Sales by Country (2021-2026)
  - 7.1.2 Europe External Semiconductor Photomask Revenue by Country (2021-2026)
- 7.2 Europe External Semiconductor Photomask Sales by Type (2021-2026)
- 7.3 Europe External Semiconductor Photomask Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

## **8 MIDDLE EAST & AFRICA**

- 8.1 Middle East & Africa External Semiconductor Photomask by Country

8.1.1 Middle East & Africa External Semiconductor Photomask Sales by Country (2021-2026)

8.1.2 Middle East & Africa External Semiconductor Photomask Revenue by Country (2021-2026)

8.2 Middle East & Africa External Semiconductor Photomask Sales by Type (2021-2026)

8.3 Middle East & Africa External Semiconductor Photomask Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of External Semiconductor Photomask

10.3 Manufacturing Process Analysis of External Semiconductor Photomask

10.4 Industry Chain Structure of External Semiconductor Photomask

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 External Semiconductor Photomask Distributors

11.3 External Semiconductor Photomask Customer

## **12 WORLD FORECAST REVIEW FOR EXTERNAL SEMICONDUCTOR PHOTOMASK BY GEOGRAPHIC REGION**

12.1 Global External Semiconductor Photomask Market Size Forecast by Region

- 12.1.1 Global External Semiconductor Photomask Forecast by Region (2027-2032)
- 12.1.2 Global External Semiconductor Photomask Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global External Semiconductor Photomask Forecast by Type (2027-2032)
- 12.7 Global External Semiconductor Photomask Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

### 13.1 Tekscend Photomask

- 13.1.1 Tekscend Photomask Company Information
- 13.1.2 Tekscend Photomask External Semiconductor Photomask Product Portfolios and Specifications
- 13.1.3 Tekscend Photomask External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Tekscend Photomask Main Business Overview
- 13.1.5 Tekscend Photomask Latest Developments

### 13.2 Photronics

- 13.2.1 Photronics Company Information
- 13.2.2 Photronics External Semiconductor Photomask Product Portfolios and Specifications
- 13.2.3 Photronics External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Photronics Main Business Overview
- 13.2.5 Photronics Latest Developments

### 13.3 DNP

- 13.3.1 DNP Company Information
- 13.3.2 DNP External Semiconductor Photomask Product Portfolios and Specifications
- 13.3.3 DNP External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 DNP Main Business Overview
- 13.3.5 DNP Latest Developments

### 13.4 Hoya

- 13.4.1 Hoya Company Information
- 13.4.2 Hoya External Semiconductor Photomask Product Portfolios and Specifications
- 13.4.3 Hoya External Semiconductor Photomask Sales, Revenue, Price and Gross

## Margin (2021-2026)

13.4.4 Hoya Main Business Overview

13.4.5 Hoya Latest Developments

## 13.5 SK-Electronics

13.5.1 SK-Electronics Company Information

13.5.2 SK-Electronics External Semiconductor Photomask Product Portfolios and Specifications

13.5.3 SK-Electronics External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 SK-Electronics Main Business Overview

13.5.5 SK-Electronics Latest Developments

## 13.6 Taiwan Mask

13.6.1 Taiwan Mask Company Information

13.6.2 Taiwan Mask External Semiconductor Photomask Product Portfolios and Specifications

13.6.3 Taiwan Mask External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Taiwan Mask Main Business Overview

13.6.5 Taiwan Mask Latest Developments

## 13.7 ShenZheng QingVi

13.7.1 ShenZheng QingVi Company Information

13.7.2 ShenZheng QingVi External Semiconductor Photomask Product Portfolios and Specifications

13.7.3 ShenZheng QingVi External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 ShenZheng QingVi Main Business Overview

13.7.5 ShenZheng QingVi Latest Developments

## 13.8 Newway Photomask

13.8.1 Newway Photomask Company Information

13.8.2 Newway Photomask External Semiconductor Photomask Product Portfolios and Specifications

13.8.3 Newway Photomask External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Newway Photomask Main Business Overview

13.8.5 Newway Photomask Latest Developments

## 13.9 Compugraphics

13.9.1 Compugraphics Company Information

13.9.2 Compugraphics External Semiconductor Photomask Product Portfolios and Specifications

13.9.3 Compugraphics External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Compugraphics Main Business Overview

13.9.5 Compugraphics Latest Developments

13.10 Nippon Filcon

13.10.1 Nippon Filcon Company Information

13.10.2 Nippon Filcon External Semiconductor Photomask Product Portfolios and Specifications

13.10.3 Nippon Filcon External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Nippon Filcon Main Business Overview

13.10.5 Nippon Filcon Latest Developments

13.11 Shenzhen Longtu Photomask

13.11.1 Shenzhen Longtu Photomask Company Information

13.11.2 Shenzhen Longtu Photomask External Semiconductor Photomask Product Portfolios and Specifications

13.11.3 Shenzhen Longtu Photomask External Semiconductor Photomask Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Shenzhen Longtu Photomask Main Business Overview

13.11.5 Shenzhen Longtu Photomask Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

- Table 1. External Semiconductor Photomask Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. External Semiconductor Photomask Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Quartz Photomask
- Table 4. Major Players of Soda Lime Glass Photomask
- Table 5. Major Players of Others
- Table 6. Global External Semiconductor Photomask Sales by Type (2021-2026) & (K Sqm)
- Table 7. Global External Semiconductor Photomask Sales Market Share by Type (2021-2026)
- Table 8. Global External Semiconductor Photomask Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global External Semiconductor Photomask Revenue Market Share by Type (2021-2026)
- Table 10. Global External Semiconductor Photomask Sale Price by Type (2021-2026) & (US\$/Sq m)
- Table 11. Major Players of UV Photomask
- Table 12. Major Players of DUV Photomask
- Table 13. Major Players of EUV Photomask
- Table 14. Major Players of Others
- Table 15. Global External Semiconductor Photomask Sales by Lithography Light Source (2021-2026) & (K Sqm)
- Table 16. Global External Semiconductor Photomask Sales Market Share by Lithography Light Source (2021-2026)
- Table 17. Global External Semiconductor Photomask Revenue by Lithography Light Source (2021-2026) & (\$ million)
- Table 18. Global External Semiconductor Photomask Revenue Market Share by Lithography Light Source (2021-2026)
- Table 19. Global External Semiconductor Photomask Sale Price by Lithography Light Source (2021-2026) & (US\$/Sq m)
- Table 20. Major Players of Advanced Process Photomask
- Table 21. Major Players of Mature Process Photomask
- Table 22. Major Players of Low-end Process Photomask
- Table 23. Global External Semiconductor Photomask Sales by Process Precision

(2021-2026) & (K Sqm)

Table 24. Global External Semiconductor Photomask Sales Market Share by Process Precision (2021-2026)

Table 25. Global External Semiconductor Photomask Revenue by Process Precision (2021-2026) & (\$ million)

Table 26. Global External Semiconductor Photomask Revenue Market Share by Process Precision (2021-2026)

Table 27. Global External Semiconductor Photomask Sale Price by Process Precision (2021-2026) & (US\$/Sq m)

Table 28. Global External Semiconductor Photomask Sale by Application (2021-2026) & (K Sqm)

Table 29. Global External Semiconductor Photomask Sale Market Share by Application (2021-2026)

Table 30. Global External Semiconductor Photomask Revenue by Application (2021-2026) & (\$ million)

Table 31. Global External Semiconductor Photomask Revenue Market Share by Application (2021-2026)

Table 32. Global External Semiconductor Photomask Sale Price by Application (2021-2026) & (US\$/Sq m)

Table 33. Global External Semiconductor Photomask Sales by Company (2021-2026) & (K Sqm)

Table 34. Global External Semiconductor Photomask Sales Market Share by Company (2021-2026)

Table 35. Global External Semiconductor Photomask Revenue by Company (2021-2026) & (\$ millions)

Table 36. Global External Semiconductor Photomask Revenue Market Share by Company (2021-2026)

Table 37. Global External Semiconductor Photomask Sale Price by Company (2021-2026) & (US\$/Sq m)

Table 38. Key Manufacturers External Semiconductor Photomask Producing Area Distribution and Sales Area

Table 39. Players External Semiconductor Photomask Products Offered

Table 40. External Semiconductor Photomask Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 41. New Products and Potential Entrants

Table 42. Market M&A Activity & Strategy

Table 43. Global External Semiconductor Photomask Sales by Geographic Region (2021-2026) & (K Sqm)

Table 44. Global External Semiconductor Photomask Sales Market Share Geographic

## Region (2021-2026)

Table 45. Global External Semiconductor Photomask Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 46. Global External Semiconductor Photomask Revenue Market Share by Geographic Region (2021-2026)

Table 47. Global External Semiconductor Photomask Sales by Country/Region (2021-2026) & (K Sqm)

Table 48. Global External Semiconductor Photomask Sales Market Share by Country/Region (2021-2026)

Table 49. Global External Semiconductor Photomask Revenue by Country/Region (2021-2026) & (\$ millions)

Table 50. Global External Semiconductor Photomask Revenue Market Share by Country/Region (2021-2026)

Table 51. Americas External Semiconductor Photomask Sales by Country (2021-2026) & (K Sqm)

Table 52. Americas External Semiconductor Photomask Sales Market Share by Country (2021-2026)

Table 53. Americas External Semiconductor Photomask Revenue by Country (2021-2026) & (\$ millions)

Table 54. Americas External Semiconductor Photomask Sales by Type (2021-2026) & (K Sqm)

Table 55. Americas External Semiconductor Photomask Sales by Application (2021-2026) & (K Sqm)

Table 56. APAC External Semiconductor Photomask Sales by Region (2021-2026) & (K Sqm)

Table 57. APAC External Semiconductor Photomask Sales Market Share by Region (2021-2026)

Table 58. APAC External Semiconductor Photomask Revenue by Region (2021-2026) & (\$ millions)

Table 59. APAC External Semiconductor Photomask Sales by Type (2021-2026) & (K Sqm)

Table 60. APAC External Semiconductor Photomask Sales by Application (2021-2026) & (K Sqm)

Table 61. Europe External Semiconductor Photomask Sales by Country (2021-2026) & (K Sqm)

Table 62. Europe External Semiconductor Photomask Revenue by Country (2021-2026) & (\$ millions)

Table 63. Europe External Semiconductor Photomask Sales by Type (2021-2026) & (K Sqm)

Table 64. Europe External Semiconductor Photomask Sales by Application (2021-2026) & (K Sqm)

Table 65. Middle East & Africa External Semiconductor Photomask Sales by Country (2021-2026) & (K Sqm)

Table 66. Middle East & Africa External Semiconductor Photomask Revenue Market Share by Country (2021-2026)

Table 67. Middle East & Africa External Semiconductor Photomask Sales by Type (2021-2026) & (K Sqm)

Table 68. Middle East & Africa External Semiconductor Photomask Sales by Application (2021-2026) & (K Sqm)

Table 69. Key Market Drivers & Growth Opportunities of External Semiconductor Photomask

Table 70. Key Market Challenges & Risks of External Semiconductor Photomask

Table 71. Key Industry Trends of External Semiconductor Photomask

Table 72. External Semiconductor Photomask Raw Material

Table 73. Key Suppliers of Raw Materials

Table 74. External Semiconductor Photomask Distributors List

Table 75. External Semiconductor Photomask Customer List

Table 76. Global External Semiconductor Photomask Sales Forecast by Region (2027-2032) & (K Sqm)

Table 77. Global External Semiconductor Photomask Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Americas External Semiconductor Photomask Sales Forecast by Country (2027-2032) & (K Sqm)

Table 79. Americas External Semiconductor Photomask Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. APAC External Semiconductor Photomask Sales Forecast by Region (2027-2032) & (K Sqm)

Table 81. APAC External Semiconductor Photomask Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 82. Europe External Semiconductor Photomask Sales Forecast by Country (2027-2032) & (K Sqm)

Table 83. Europe External Semiconductor Photomask Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Middle East & Africa External Semiconductor Photomask Sales Forecast by Country (2027-2032) & (K Sqm)

Table 85. Middle East & Africa External Semiconductor Photomask Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Global External Semiconductor Photomask Sales Forecast by Type

(2027-2032) & (K Sqm)

Table 87. Global External Semiconductor Photomask Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 88. Global External Semiconductor Photomask Sales Forecast by Application (2027-2032) & (K Sqm)

Table 89. Global External Semiconductor Photomask Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 90. Tekscend Photomask Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 91. Tekscend Photomask External Semiconductor Photomask Product Portfolios and Specifications

Table 92. Tekscend Photomask External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 93. Tekscend Photomask Main Business

Table 94. Tekscend Photomask Latest Developments

Table 95. Photronics Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 96. Photronics External Semiconductor Photomask Product Portfolios and Specifications

Table 97. Photronics External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 98. Photronics Main Business

Table 99. Photronics Latest Developments

Table 100. DNP Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 101. DNP External Semiconductor Photomask Product Portfolios and Specifications

Table 102. DNP External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 103. DNP Main Business

Table 104. DNP Latest Developments

Table 105. Hoya Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 106. Hoya External Semiconductor Photomask Product Portfolios and Specifications

Table 107. Hoya External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 108. Hoya Main Business

Table 109. Hoya Latest Developments

Table 110. SK-Electronics Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 111. SK-Electronics External Semiconductor Photomask Product Portfolios and Specifications

Table 112. SK-Electronics External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 113. SK-Electronics Main Business

Table 114. SK-Electronics Latest Developments

Table 115. Taiwan Mask Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 116. Taiwan Mask External Semiconductor Photomask Product Portfolios and Specifications

Table 117. Taiwan Mask External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 118. Taiwan Mask Main Business

Table 119. Taiwan Mask Latest Developments

Table 120. ShenZheng QingVi Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 121. ShenZheng QingVi External Semiconductor Photomask Product Portfolios and Specifications

Table 122. ShenZheng QingVi External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 123. ShenZheng QingVi Main Business

Table 124. ShenZheng QingVi Latest Developments

Table 125. Newway Photomask Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 126. Newway Photomask External Semiconductor Photomask Product Portfolios and Specifications

Table 127. Newway Photomask External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 128. Newway Photomask Main Business

Table 129. Newway Photomask Latest Developments

Table 130. Compugraphics Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 131. Compugraphics External Semiconductor Photomask Product Portfolios and Specifications

Table 132. Compugraphics External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 133. Compugraphics Main Business

Table 134. Compugraphics Latest Developments

Table 135. Nippon Filcon Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 136. Nippon Filcon External Semiconductor Photomask Product Portfolios and Specifications

Table 137. Nippon Filcon External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 138. Nippon Filcon Main Business

Table 139. Nippon Filcon Latest Developments

Table 140. Shenzhen Longtu Photomask Basic Information, External Semiconductor Photomask Manufacturing Base, Sales Area and Its Competitors

Table 141. Shenzhen Longtu Photomask External Semiconductor Photomask Product Portfolios and Specifications

Table 142. Shenzhen Longtu Photomask External Semiconductor Photomask Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)

Table 143. Shenzhen Longtu Photomask Main Business

Table 144. Shenzhen Longtu Photomask Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of External Semiconductor Photomask
- Figure 2. External Semiconductor Photomask Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global External Semiconductor Photomask Sales Growth Rate 2021-2032 (K Sqm)
- Figure 7. Global External Semiconductor Photomask Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. External Semiconductor Photomask Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. External Semiconductor Photomask Sales Market Share by Country/Region (2025)
- Figure 10. External Semiconductor Photomask Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Quartz Photomask
- Figure 12. Product Picture of Soda Lime Glass Photomask
- Figure 13. Product Picture of Others
- Figure 14. Global External Semiconductor Photomask Sales Market Share by Type in 2026
- Figure 15. Global External Semiconductor Photomask Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of UV Photomask
- Figure 17. Product Picture of DUV Photomask
- Figure 18. Product Picture of EUV Photomask
- Figure 19. Product Picture of Others
- Figure 20. Global External Semiconductor Photomask Sales Market Share by Lithography Light Source in 2026
- Figure 21. Global External Semiconductor Photomask Revenue Market Share by Lithography Light Source (2021-2026)
- Figure 22. Product Picture of Advanced Process Photomask
- Figure 23. Product Picture of Mature Process Photomask
- Figure 24. Product Picture of Low-end Process Photomask
- Figure 25. Global External Semiconductor Photomask Sales Market Share by Process Precision in 2026

Figure 26. Global External Semiconductor Photomask Revenue Market Share by Process Precision (2021-2026)

Figure 27. External Semiconductor Photomask Consumed in Logic Chips

Figure 28. Global External Semiconductor Photomask Market: Logic Chips (2021-2026) & (K Sqm)

Figure 29. External Semiconductor Photomask Consumed in Memory Chips

Figure 30. Global External Semiconductor Photomask Market: Memory Chips (2021-2026) & (K Sqm)

Figure 31. External Semiconductor Photomask Consumed in Power Semiconductors

Figure 32. Global External Semiconductor Photomask Market: Power Semiconductors (2021-2026) & (K Sqm)

Figure 33. External Semiconductor Photomask Consumed in RF Chips

Figure 34. Global External Semiconductor Photomask Market: RF Chips (2021-2026) & (K Sqm)

Figure 35. External Semiconductor Photomask Consumed in MEMS Devices

Figure 36. Global External Semiconductor Photomask Market: MEMS Devices (2021-2026) & (K Sqm)

Figure 37. External Semiconductor Photomask Consumed in Others

Figure 38. Global External Semiconductor Photomask Market: Others (2021-2026) & (K Sqm)

Figure 39. Global External Semiconductor Photomask Sale Market Share by Application (2025)

Figure 40. Global External Semiconductor Photomask Revenue Market Share by Application in 2026

Figure 41. External Semiconductor Photomask Sales by Company in 2026 (K Sqm)

Figure 42. Global External Semiconductor Photomask Sales Market Share by Company in 2026

Figure 43. External Semiconductor Photomask Revenue by Company in 2026 (\$ millions)

Figure 44. Global External Semiconductor Photomask Revenue Market Share by Company in 2026

Figure 45. Global External Semiconductor Photomask Sales Market Share by Geographic Region (2021-2026)

Figure 46. Global External Semiconductor Photomask Revenue Market Share by Geographic Region in 2026

Figure 47. Americas External Semiconductor Photomask Sales 2021-2026 (K Sqm)

Figure 48. Americas External Semiconductor Photomask Revenue 2021-2026 (\$ millions)

Figure 49. APAC External Semiconductor Photomask Sales 2021-2026 (K Sqm)

- Figure 50. APAC External Semiconductor Photomask Revenue 2021-2026 (\$ millions)
- Figure 51. Europe External Semiconductor Photomask Sales 2021-2026 (K Sqm)
- Figure 52. Europe External Semiconductor Photomask Revenue 2021-2026 (\$ millions)
- Figure 53. Middle East & Africa External Semiconductor Photomask Sales 2021-2026 (K Sqm)
- Figure 54. Middle East & Africa External Semiconductor Photomask Revenue 2021-2026 (\$ millions)
- Figure 55. Americas External Semiconductor Photomask Sales Market Share by Country in 2026
- Figure 56. Americas External Semiconductor Photomask Revenue Market Share by Country (2021-2026)
- Figure 57. Americas External Semiconductor Photomask Sales Market Share by Type (2021-2026)
- Figure 58. Americas External Semiconductor Photomask Sales Market Share by Application (2021-2026)
- Figure 59. United States External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 60. Canada External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 61. Mexico External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 62. Brazil External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 63. APAC External Semiconductor Photomask Sales Market Share by Region in 2026
- Figure 64. APAC External Semiconductor Photomask Revenue Market Share by Region (2021-2026)
- Figure 65. APAC External Semiconductor Photomask Sales Market Share by Type (2021-2026)
- Figure 66. APAC External Semiconductor Photomask Sales Market Share by Application (2021-2026)
- Figure 67. China External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 68. Japan External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 69. South Korea External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)
- Figure 70. Southeast Asia External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 71. India External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 72. Australia External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 73. China Taiwan External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 74. Europe External Semiconductor Photomask Sales Market Share by Country in 2026

Figure 75. Europe External Semiconductor Photomask Revenue Market Share by Country (2021-2026)

Figure 76. Europe External Semiconductor Photomask Sales Market Share by Type (2021-2026)

Figure 77. Europe External Semiconductor Photomask Sales Market Share by Application (2021-2026)

Figure 78. Germany External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 79. France External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 80. UK External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 81. Italy External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 82. Russia External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 83. Middle East & Africa External Semiconductor Photomask Sales Market Share by Country (2021-2026)

Figure 84. Middle East & Africa External Semiconductor Photomask Sales Market Share by Type (2021-2026)

Figure 85. Middle East & Africa External Semiconductor Photomask Sales Market Share by Application (2021-2026)

Figure 86. Egypt External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 87. South Africa External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 88. Israel External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 89. Turkey External Semiconductor Photomask Revenue Growth 2021-2026 (\$ millions)

Figure 90. GCC Countries External Semiconductor Photomask Revenue Growth

2021-2026 (\$ millions)

Figure 91. Manufacturing Cost Structure Analysis of External Semiconductor Photomask in 2026

Figure 92. Manufacturing Process Analysis of External Semiconductor Photomask

Figure 93. Industry Chain Structure of External Semiconductor Photomask

Figure 94. Channels of Distribution

Figure 95. Global External Semiconductor Photomask Sales Market Forecast by Region (2027-2032)

Figure 96. Global External Semiconductor Photomask Revenue Market Share Forecast by Region (2027-2032)

Figure 97. Global External Semiconductor Photomask Sales Market Share Forecast by Type (2027-2032)

Figure 98. Global External Semiconductor Photomask Revenue Market Share Forecast by Type (2027-2032)

Figure 99. Global External Semiconductor Photomask Sales Market Share Forecast by Application (2027-2032)

Figure 100. Global External Semiconductor Photomask Revenue Market Share Forecast by Application (2027-2032)

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