

Global Quartz Masks Market Growth 2026-2032

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Abstracts

The global Quartz Masks market size is predicted to grow from US\$ 3479 million in 2025 to US\$ 5032 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

A quartz mask is a high-precision optical template using high-purity quartz glass as a substrate. A metallic light-shielding layer (usually chromium, Cr) is deposited on the surface, and intricate patterns are formed through photolithography and etching processes. It is primarily used in the pattern transfer process during the manufacturing of semiconductors, display panels, PCBs, MEMS, and optoelectronic devices. Its core function is to project pre-designed micro-circuits or structural patterns onto the surface of wafers, glass substrates, or photosensitive materials using ultraviolet or extreme ultraviolet light in exposure equipment. It is one of the key fundamental materials in modern microelectronics manufacturing.

The upstream of the industry chain mainly includes high-purity quartz substrates, chromium targets, photoresists, coating materials, electron beam exposure equipment, defect detection equipment, and ultra-clean processing materials, among which high-purity quartz glass and EUV mask blanks are core key materials. The midstream consists of quartz mask design, manufacturing, and repair companies, involving high-precision processes such as electron beam exposure, chromium plating, photolithography, etching, defect detection, and pattern repair. The downstream is mainly used in semiconductor wafer manufacturing, OLED/LCD display panels, PCB circuit boards, MEMS devices, optical communication, and micro-nano processing. AI chips, advanced processes (5nm/3nm), EUV lithography, and high-end display panels are becoming the fastest-growing areas for quartz mask demand.

In 2025, global quartz mask sales reached 234,000 pieces, with a production capacity of approximately 334,000 pieces, an average selling price of US\$15,200 per piece, and

an average gross profit margin of 30%-40%.

In terms of products and technology, the quartz mask industry is upgrading from traditional binary photomasks to Phase Shift Masks (PSM), EUV Masks, and high-precision multilayer masks. Current advanced semiconductor processes rely on EUV lithography, requiring nanometer-level flatness, defect rate, and pattern accuracy in quartz substrates. Simultaneously, large-size display panels are driving the expansion of high-generation mask sizes, while advanced packaging, chiplets, and MEMS technologies are driving the demand for high-precision microstructure masks. In the future, the industry will further develop towards low defect rates, high transmittance, ultra-high precision, and intelligent detection, while AI defect detection and automatic repair systems are beginning to enter high-end mask manufacturing processes.

Regarding the policy environment, the restructuring of the global semiconductor supply chain, chip localization, and advanced manufacturing self-sufficiency are profoundly impacting the quartz photomask industry. The United States, Japan, and Europe are increasingly strengthening export controls on advanced lithography and semiconductor equipment, while China continues to increase its support for the localization of semiconductor materials and photomasks. At the same time, global wafer fab expansion, advanced packaging investment, and the growing demand for AI chips are bringing new growth opportunities to the quartz mask industry. However, the industry also faces challenges such as huge equipment investment, rapid technological iteration, high difficulty of EUV process, and long customer certification cycle.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Quartz Masks 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 Quartz Masks.

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

Segmentation by Type:

Binary Mask

Phase Shift Mask

EUV Mask

Attenuated PSM Mask

Segmentation by Accuracy:

≤200nm

200-350nm

≥350nm

Segmentation by Light-Blocking Material:

Chrome Mask

Non-Chrome Mask

Segmentation by Application:

Semiconductor Wafer Manufacturing

OLED/LCD Display Panel Manufacturing

PCB Circuit Board Manufacturing

MEMS Device Manufacturing

Optical Communication

Advanced Packaging

Other

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.

Photronics

Toppan

DNP

Hoya

SK-Electronics

LG Innotek

Tosoh

Shin-Etsu Chemical

Longtu Photomask

QingVi

Taiwan Mask

Newway Photomask

Keystone

Changsha Shaoguang Semiconductor Materials

OMNISUN Information Materials

Feilihua

Zhongtian Technology

Pacific Quartz

Key Questions Addressed in this Report

What is the 10-year outlook for the global Quartz Masks market?

What factors are driving Quartz Masks market growth, globally and by region?

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

How do Quartz Masks market opportunities vary by end market size?

How does Quartz Masks break out by Type, by Application?

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