

Photomask Market to 2025 - Global Analysis and Forecasts by Type (Reticle, Working Mask, Master mask and Copy Mask), Application (Semiconductor and IC, Discrete, Optoelectronics, Display Devices, MEMS and Others) and End-user Vertical (Semiconductor & IC and Flat Panel Display)

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Abstracts

Photomask market is expected to reach US\$ 4,949.1 million by 2025 from US\$ 3,320.0 million in 2015. Semiconductor & IC application is expected to continue its dominance. Currently, almost 30% of the photomask are used by semiconductor & IC manufacturing companies. with the prominent growth in the sales of semiconductor devices, the demand for new set of photomasks is also set to increase. Advancement in processor technology by Qualcomm, Intel, AMD and Nvidia is posing a good growth opportunity for the photomask market. Availability of advanced technology for semiconductor packaging such as 3D packaging to shrink the size of semiconductor devices is set to multiply the demand for new photomask sets for the fabrication of these chips. Additionally, implementation of IoT (internet of Things) is further going to increase the penetration of semiconductors and IC in day to day things

Key trend which will predominantly effect the market in coming year is photomask market is integration of robotics. Growing automation in semiconductor and electronics industry has witnessed significant progress over a period. As the market witnesses' growth and adoption of automation, competition is expected to pace up with the aid of innovations in a very short time period. The advent of IoT has become a path breaking business operations methodology. Robotics is expected to play a supplementary role to the development of IoT and semiconductor and electronics systems can be considered as its backbone. IoT will be applied in all industry verticals and rising demands for smart

cities, smart homes, smart buildings and smart infrastructure would further prove to be path breaking for the semiconductor industry. A huge demand for such sensors would be there which is expected to be implemented with a proper Photomasking tool.

Photomask market by end-user vertical is segmented into semiconductor & IC and flat panel display. The Semiconductor & IC end-user includes semiconductor chip fabricating firms or semiconductor foundries. This basically includes players those who manufacture chips, wafer-boards and circuits. Semiconductor forms an integral part of all electronics devices ranging from smartphones, tablets, computers, automotive electronics, healthcare electronics, aerospace electronics and military electronics among others. Photomasks are used to imprint the circuit diagram onto a wafer board or used to imprint circuit diagram. Every new set of board or circuit diagram requires a newer set of photomasks. Photomask are fed into a scanner or aligner and then it is projected onto the wafer board to print the circuit diagram. As electronic components are getting miniaturized, the complexity of fabricating is also getting complex, thus the dependence on photomask to accurately portray the circuit diagram is properly is gaining importance. Additionally, smaller semiconductor chips are fabricated by deploying various layers of small component where each layer require its unique photomask.

The overall market size has been derived using both primary and secondary source. The research process begins with an exhaustive secondary research using internal and external sources to obtain qualitative and quantitative information related to the market. Also, primary interview were conducted with industry participants and commentators in order to validate data and analysis. The participants who typically take part in such a process include industry expert such as VPs, business development managers, market intelligence managers and national sales managers, and external consultant such as valuation experts, research analysts and key opinion leaders specializing in the photomask industry.

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