

Global High-NA EUV Mask Pellicle Frame Assembly Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High-NA EUV Mask Pellicle Frame Assembly market size is expected to reach \$ 1110 million by 2032, rising at a market growth of 29.1% CAGR during the forecast period (2026-2032).

In 2025, global High-NA EUV Mask Pellicle Frame Assembly production reached approximately 1,047 sets, with an average global market price of around USD 172,000 per set.

The gross profit margin of major companies in the industry is between 38.64%-64.58%.

In 2025, the global production capacity of High-NA EUV Mask Pellicle Frame Assembly was approximately 1,377 sets.

High-NA EUV Mask Pellicle Frame Assembly is a precision frame and support assembly used to mount and protect pellicles for high numerical aperture extreme ultraviolet lithography masks. It must provide dimensional stability, ultra-low contamination, thermal compatibility and mechanical reliability under EUV exposure and vacuum conditions. The product supports advanced semiconductor mask protection for leading-edge chip manufacturing. The market includes frame assemblies and precision support structures for High-NA EUV pellicles, but excludes complete photomasks, pellicle membranes alone and standard deep ultraviolet pellicle frames.

The industry chain includes precision metals, ceramic materials, ultra-clean coatings, bonding materials, microfabrication components, metrology tools, cleanroom consumables and vacuum-compatible packaging. Midstream production covers precision machining, surface treatment, cleaning, bonding, dimensional inspection,

particle control, thermal testing and cleanroom packaging. Downstream demand comes from advanced lithography mask shops, semiconductor fabs, EUV process development and leading-edge logic or memory manufacturing. Growth is driven by High-NA EUV adoption, tighter defect control, smaller process nodes and demand for highly reliable mask protection.

This report studies the global High-NA EUV Mask Pellicle Frame Assembly production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High-NA EUV Mask Pellicle Frame Assembly and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of High-NA EUV Mask Pellicle Frame Assembly that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High-NA EUV Mask Pellicle Frame Assembly total production and demand, 2021-2032, (Units)

Global High-NA EUV Mask Pellicle Frame Assembly total production value, 2021-2032, (USD Million)

Global High-NA EUV Mask Pellicle Frame Assembly production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global High-NA EUV Mask Pellicle Frame Assembly consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: High-NA EUV Mask Pellicle Frame Assembly domestic production, consumption, key domestic manufacturers and share

Global High-NA EUV Mask Pellicle Frame Assembly production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global High-NA EUV Mask Pellicle Frame Assembly production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global High-NA EUV Mask Pellicle Frame Assembly production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global High-NA EUV Mask Pellicle Frame Assembly market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASML, Carl Zeiss

SMT, HOYA Corporation, Toppan, FUJIFILM Corporation, AGC Inc., Entegris, S?SS MicroTec, DuPont, 3M, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World High-NA EUV Mask Pellicle Frame Assembly market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global High-NA EUV Mask Pellicle Frame Assembly Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High-NA EUV Mask Pellicle Frame Assembly Market, Segmentation by Type:

Silicon Frame Assemblies

Metal Alloy Frame Assemblies

Ceramic Composite Frame Assemblies

Global High-NA EUV Mask Pellicle Frame Assembly Market, Segmentation by Assembly Structure:

Adhesive Bonded Frame Assemblies

Mechanical Clamping Frame Assemblies

Integrated Pellicle-Frame Assemblies

Global High-NA EUV Mask Pellicle Frame Assembly Market, Segmentation by Frame Height:

Low Profile??2 mm?

Medium Profile?2.1?4 mm?

High Profile??4 mm?

Global High-NA EUV Mask Pellicle Frame Assembly Market, Segmentation by Application:

High-NA EUV Logic Chip Manufacturing

High-NA EUV Memory Chip Manufacturing

Advanced Foundry Process Development

Other

Companies Profiled:

ASML

Carl Zeiss SMT

HOYA Corporation

Toppan

FUJIFILM Corporation

AGC Inc.

Entegris

S&S MicroTec

DuPont

3M

Canatu

Shenzhen Qingyi Photomask

Hubei Dinglong

Jiangsu Pacific Quartz

Beijing NMC Coating Technology

Shanghai Simgui Technology

Key Questions Answered:

1. How big is the global High-NA EUV Mask Pellicle Frame Assembly market?
2. What is the demand of the global High-NA EUV Mask Pellicle Frame Assembly market?
3. What is the year over year growth of the global High-NA EUV Mask Pellicle Frame Assembly market?

4. What is the production and production value of the global High-NA EUV Mask Pellicle Frame Assembly market?
5. Who are the key producers in the global High-NA EUV Mask Pellicle Frame Assembly market?
6. What are the growth factors driving the market demand?

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