

Global Pellicle Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

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Abstracts

According to our (Global Info Research) latest study, the global Pellicle market size was valued at US\$ 910 million in 2024 and is forecast to a readjusted size of USD 1520 million by 2031 with a CAGR of 7.6% during review period.

The pellicle is a part of the photomask. As a covering, the pellicle is suspended above the photomask to form a physical barrier. Even if particles fall on it, they will not touch the mask itself. The pellicle can effectively prevent mask contamination and plays a vital role in improving production efficiency and chip quality.

A pellicle is a thin membrane stretched over an aluminum frame and glued to the photomask to protect it from contaminants, such as particles. Even if particles sit on the membrane, they are not printed on the wafer/ flat panel displays because they are out of focus during the exposure from the lithography process.

The process of preparing this Pellicle is also full of scientific and technological content. Usually, precise vacuum coating technology such as physical vapor deposition (PVD) or chemical vapor deposition (CVD) is used to form a uniform and dense film on the surface of the mask. This process requires precise control of parameters such as temperature, pressure and gas flow to ensure the quality and performance of the film.

Global key Pellicle players cover Mitsui Chemicals, Shin-Etsu, FINE SEMITECH, Micro Lithography, Inc., S&S Tech and INKO, etc. In terms of revenue, the global 3 largest companies occupied for a share nearly 85.67% in 2023.

From the perspective of downstream fields, the semiconductor field occupies a dominant position, accounting for about 74.17% in 2023. In semiconductor

manufacturing, the role of this Pellicle is far more than simple physical protection. It can also effectively reduce the diffraction effect in the lithography process and improve the imaging quality. Especially in extreme ultraviolet lithography (EUVL) technology, due to the extremely short wavelength of the light source (about 13.5nm), the traditional penetrating mask can no longer be used. At this time, the reflective mask and its Pellicle have become the key technology.

It is worth noting that with the continuous advancement of chip manufacturing technology, the requirements for the mask Pellicle are getting higher and higher. For example, in advanced processes of 7nm and below, the size of the pattern on the mask may be only tens of nanometers, which puts extremely stringent requirements on the uniformity and defect control of the Pellicle.

Globally, Asia (especially China, Taiwan, and South Korea) dominates the mask protective film market. China is playing an increasingly important role in the world. As China develops in the field of semiconductor manufacturing, the demand for mask protective films in the region is also increasing.

This report is a detailed and comprehensive analysis for global Pellicle market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Pellicle market size and forecasts, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (USD/Sqm), 2020-2031

Global Pellicle market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (USD/Sqm), 2020-2031

Global Pellicle market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (USD/Sqm), 2020-2031

Global Pellicle market shares of main players, shipments in revenue (\$ Million), sales

quantity (K Sqm), and ASP (USD/Sqm), 2020-2025

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Pellicle

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Pellicle market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include MITSUI Chemical, FINE SEMITECH, NEPCO, Shin-Etsu, INKO, S&S Tech, Canatu, Micro Lithography Inc (MLI), etc.

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

Market Segmentation

Pellicle market is split by Type and by Application. For the period 2020-2031, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Pellicle for Quartz Mask

Pellicle for Soda Mask

Market segment by Application

Semiconductor

FPD

Others

Major players covered

MITSUI Chemical

FINE SEMITECH

NEPCO

Shin-Etsu

INKO

S&S Tech

Canatu

Micro Lithography Inc (MLI)

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Pellicle product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Pellicle, with price, sales quantity, revenue, and global market share of Pellicle from 2020 to 2025.

Chapter 3, the Pellicle competitive situation, sales quantity, revenue, and global market

share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Pellicle breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2020 to 2031.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2020 to 2031.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2020 to 2025. and Pellicle market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Pellicle.

Chapter 14 and 15, to describe Pellicle sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Pellicle Consumption Value by Type: 2020 Versus 2024 Versus 2031

1.3.2 Pellicle for Quartz Mask

1.3.3 Pellicle for Soda Mask

1.4 Market Analysis by Application

1.4.1 Overview: Global Pellicle Consumption Value by Application: 2020 Versus 2024 Versus 2031

1.4.2 Semiconductor

1.4.3 FPD

1.4.4 Others

1.5 Global Pellicle Market Size & Forecast

1.5.1 Global Pellicle Consumption Value (2020 & 2024 & 2031)

1.5.2 Global Pellicle Sales Quantity (2020-2031)

1.5.3 Global Pellicle Average Price (2020-2031)

2 MANUFACTURERS PROFILES

2.1 MITSUI Chemical

2.1.1 MITSUI Chemical Details

2.1.2 MITSUI Chemical Major Business

2.1.3 MITSUI Chemical Pellicle Product and Services

2.1.4 MITSUI Chemical Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)

2.1.5 MITSUI Chemical Recent Developments/Updates

2.2 FINE SEMITECH

2.2.1 FINE SEMITECH Details

2.2.2 FINE SEMITECH Major Business

2.2.3 FINE SEMITECH Pellicle Product and Services

2.2.4 FINE SEMITECH Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)

2.2.5 FINE SEMITECH Recent Developments/Updates

2.3 NEPCO

- 2.3.1 NEPCO Details
- 2.3.2 NEPCO Major Business
- 2.3.3 NEPCO Pellicle Product and Services
- 2.3.4 NEPCO Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)
- 2.3.5 NEPCO Recent Developments/Updates
- 2.4 Shin-Etsu
 - 2.4.1 Shin-Etsu Details
 - 2.4.2 Shin-Etsu Major Business
 - 2.4.3 Shin-Etsu Pellicle Product and Services
 - 2.4.4 Shin-Etsu Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)
 - 2.4.5 Shin-Etsu Recent Developments/Updates
- 2.5 INKO
 - 2.5.1 INKO Details
 - 2.5.2 INKO Major Business
 - 2.5.3 INKO Pellicle Product and Services
 - 2.5.4 INKO Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)
 - 2.5.5 INKO Recent Developments/Updates
- 2.6 S&S Tech
 - 2.6.1 S&S Tech Details
 - 2.6.2 S&S Tech Major Business
 - 2.6.3 S&S Tech Pellicle Product and Services
 - 2.6.4 S&S Tech Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)
 - 2.6.5 S&S Tech Recent Developments/Updates
- 2.7 Canatu
 - 2.7.1 Canatu Details
 - 2.7.2 Canatu Major Business
 - 2.7.3 Canatu Pellicle Product and Services
 - 2.7.4 Canatu Pellicle Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2020-2025)
 - 2.7.5 Canatu Recent Developments/Updates
- 2.8 Micro Lithography Inc (MLI)
 - 2.8.1 Micro Lithography Inc (MLI) Details
 - 2.8.2 Micro Lithography Inc (MLI) Major Business
 - 2.8.3 Micro Lithography Inc (MLI) Pellicle Product and Services
 - 2.8.4 Micro Lithography Inc (MLI) Pellicle Sales Quantity, Average Price, Revenue,

Gross Margin and Market Share (2020-2025)

2.8.5 Micro Lithography Inc (MLI) Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: PELLICLE BY MANUFACTURER

3.1 Global Pellicle Sales Quantity by Manufacturer (2020-2025)

3.2 Global Pellicle Revenue by Manufacturer (2020-2025)

3.3 Global Pellicle Average Price by Manufacturer (2020-2025)

3.4 Market Share Analysis (2024)

3.4.1 Producer Shipments of Pellicle by Manufacturer Revenue (\$MM) and Market Share (%): 2024

3.4.2 Top 3 Pellicle Manufacturer Market Share in 2024

3.4.3 Top 6 Pellicle Manufacturer Market Share in 2024

3.5 Pellicle Market: Overall Company Footprint Analysis

3.5.1 Pellicle Market: Region Footprint

3.5.2 Pellicle Market: Company Product Type Footprint

3.5.3 Pellicle Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Pellicle Market Size by Region

4.1.1 Global Pellicle Sales Quantity by Region (2020-2031)

4.1.2 Global Pellicle Consumption Value by Region (2020-2031)

4.1.3 Global Pellicle Average Price by Region (2020-2031)

4.2 North America Pellicle Consumption Value (2020-2031)

4.3 Europe Pellicle Consumption Value (2020-2031)

4.4 Asia-Pacific Pellicle Consumption Value (2020-2031)

4.5 South America Pellicle Consumption Value (2020-2031)

4.6 Middle East & Africa Pellicle Consumption Value (2020-2031)

5 MARKET SEGMENT BY TYPE

5.1 Global Pellicle Sales Quantity by Type (2020-2031)

5.2 Global Pellicle Consumption Value by Type (2020-2031)

5.3 Global Pellicle Average Price by Type (2020-2031)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Pellicle Sales Quantity by Application (2020-2031)
- 6.2 Global Pellicle Consumption Value by Application (2020-2031)
- 6.3 Global Pellicle Average Price by Application (2020-2031)

7 NORTH AMERICA

- 7.1 North America Pellicle Sales Quantity by Type (2020-2031)
- 7.2 North America Pellicle Sales Quantity by Application (2020-2031)
- 7.3 North America Pellicle Market Size by Country
 - 7.3.1 North America Pellicle Sales Quantity by Country (2020-2031)
 - 7.3.2 North America Pellicle Consumption Value by Country (2020-2031)
 - 7.3.3 United States Market Size and Forecast (2020-2031)
 - 7.3.4 Canada Market Size and Forecast (2020-2031)
 - 7.3.5 Mexico Market Size and Forecast (2020-2031)

8 EUROPE

- 8.1 Europe Pellicle Sales Quantity by Type (2020-2031)
- 8.2 Europe Pellicle Sales Quantity by Application (2020-2031)
- 8.3 Europe Pellicle Market Size by Country
 - 8.3.1 Europe Pellicle Sales Quantity by Country (2020-2031)
 - 8.3.2 Europe Pellicle Consumption Value by Country (2020-2031)
 - 8.3.3 Germany Market Size and Forecast (2020-2031)
 - 8.3.4 France Market Size and Forecast (2020-2031)
 - 8.3.5 United Kingdom Market Size and Forecast (2020-2031)
 - 8.3.6 Russia Market Size and Forecast (2020-2031)
 - 8.3.7 Italy Market Size and Forecast (2020-2031)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific Pellicle Sales Quantity by Type (2020-2031)
- 9.2 Asia-Pacific Pellicle Sales Quantity by Application (2020-2031)
- 9.3 Asia-Pacific Pellicle Market Size by Region
 - 9.3.1 Asia-Pacific Pellicle Sales Quantity by Region (2020-2031)
 - 9.3.2 Asia-Pacific Pellicle Consumption Value by Region (2020-2031)
 - 9.3.3 China Market Size and Forecast (2020-2031)
 - 9.3.4 Japan Market Size and Forecast (2020-2031)
 - 9.3.5 South Korea Market Size and Forecast (2020-2031)

- 9.3.6 India Market Size and Forecast (2020-2031)
- 9.3.7 Southeast Asia Market Size and Forecast (2020-2031)
- 9.3.8 Australia Market Size and Forecast (2020-2031)

10 SOUTH AMERICA

- 10.1 South America Pellicle Sales Quantity by Type (2020-2031)
- 10.2 South America Pellicle Sales Quantity by Application (2020-2031)
- 10.3 South America Pellicle Market Size by Country
 - 10.3.1 South America Pellicle Sales Quantity by Country (2020-2031)
 - 10.3.2 South America Pellicle Consumption Value by Country (2020-2031)
 - 10.3.3 Brazil Market Size and Forecast (2020-2031)
 - 10.3.4 Argentina Market Size and Forecast (2020-2031)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Pellicle Sales Quantity by Type (2020-2031)
- 11.2 Middle East & Africa Pellicle Sales Quantity by Application (2020-2031)
- 11.3 Middle East & Africa Pellicle Market Size by Country
 - 11.3.1 Middle East & Africa Pellicle Sales Quantity by Country (2020-2031)
 - 11.3.2 Middle East & Africa Pellicle Consumption Value by Country (2020-2031)
 - 11.3.3 Turkey Market Size and Forecast (2020-2031)
 - 11.3.4 Egypt Market Size and Forecast (2020-2031)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2020-2031)
 - 11.3.6 South Africa Market Size and Forecast (2020-2031)

12 MARKET DYNAMICS

- 12.1 Pellicle Market Drivers
- 12.2 Pellicle Market Restraints
- 12.3 Pellicle Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Pellicle and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Pellicle
- 13.3 Pellicle Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Pellicle Typical Distributors
- 14.3 Pellicle Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Pellicle Consumption Value by Type, (USD Million), 2020 & 2024 & 2031

Table 2. Global Pellicle Consumption Value by Application, (USD Million), 2020 & 2024 & 2031

Table 3. MITSUI Chemical Basic Information, Manufacturing Base and Competitors

Table 4. MITSUI Chemical Major Business

Table 5. MITSUI Chemical Pellicle Product and Services

Table 6. MITSUI Chemical Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)

Table 7. MITSUI Chemical Recent Developments/Updates

Table 8. FINE SEMITECH Basic Information, Manufacturing Base and Competitors

Table 9. FINE SEMITECH Major Business

Table 10. FINE SEMITECH Pellicle Product and Services

Table 11. FINE SEMITECH Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)

Table 12. FINE SEMITECH Recent Developments/Updates

Table 13. NEPCO Basic Information, Manufacturing Base and Competitors

Table 14. NEPCO Major Business

Table 15. NEPCO Pellicle Product and Services

Table 16. NEPCO Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)

Table 17. NEPCO Recent Developments/Updates

Table 18. Shin-Etsu Basic Information, Manufacturing Base and Competitors

Table 19. Shin-Etsu Major Business

Table 20. Shin-Etsu Pellicle Product and Services

Table 21. Shin-Etsu Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)

Table 22. Shin-Etsu Recent Developments/Updates

Table 23. INKO Basic Information, Manufacturing Base and Competitors

Table 24. INKO Major Business

Table 25. INKO Pellicle Product and Services

Table 26. INKO Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)

Table 27. INKO Recent Developments/Updates

Table 28. S&S Tech Basic Information, Manufacturing Base and Competitors

Table 29. S&S Tech Major Business
Table 30. S&S Tech Pellicle Product and Services
Table 31. S&S Tech Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)
Table 32. S&S Tech Recent Developments/Updates
Table 33. Canatu Basic Information, Manufacturing Base and Competitors
Table 34. Canatu Major Business
Table 35. Canatu Pellicle Product and Services
Table 36. Canatu Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)
Table 37. Canatu Recent Developments/Updates
Table 38. Micro Lithography Inc (MLI) Basic Information, Manufacturing Base and Competitors
Table 39. Micro Lithography Inc (MLI) Major Business
Table 40. Micro Lithography Inc (MLI) Pellicle Product and Services
Table 41. Micro Lithography Inc (MLI) Pellicle Sales Quantity (K Sqm), Average Price (USD/Sqm), Revenue (USD Million), Gross Margin and Market Share (2020-2025)
Table 42. Micro Lithography Inc (MLI) Recent Developments/Updates
Table 43. Global Pellicle Sales Quantity by Manufacturer (2020-2025) & (K Sqm)
Table 44. Global Pellicle Revenue by Manufacturer (2020-2025) & (USD Million)
Table 45. Global Pellicle Average Price by Manufacturer (2020-2025) & (USD/Sqm)
Table 46. Market Position of Manufacturers in Pellicle, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2024
Table 47. Head Office and Pellicle Production Site of Key Manufacturer
Table 48. Pellicle Market: Company Product Type Footprint
Table 49. Pellicle Market: Company Product Application Footprint
Table 50. Pellicle New Market Entrants and Barriers to Market Entry
Table 51. Pellicle Mergers, Acquisition, Agreements, and Collaborations
Table 52. Global Pellicle Consumption Value by Region (2020-2024-2031) & (USD Million) & CAGR
Table 53. Global Pellicle Sales Quantity by Region (2020-2025) & (K Sqm)
Table 54. Global Pellicle Sales Quantity by Region (2026-2031) & (K Sqm)
Table 55. Global Pellicle Consumption Value by Region (2020-2025) & (USD Million)
Table 56. Global Pellicle Consumption Value by Region (2026-2031) & (USD Million)
Table 57. Global Pellicle Average Price by Region (2020-2025) & (USD/Sqm)
Table 58. Global Pellicle Average Price by Region (2026-2031) & (USD/Sqm)
Table 59. Global Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)
Table 60. Global Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)
Table 61. Global Pellicle Consumption Value by Type (2020-2025) & (USD Million)

Table 62. Global Pellicle Consumption Value by Type (2026-2031) & (USD Million)

Table 63. Global Pellicle Average Price by Type (2020-2025) & (USD/Sqm)

Table 64. Global Pellicle Average Price by Type (2026-2031) & (USD/Sqm)

Table 65. Global Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 66. Global Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 67. Global Pellicle Consumption Value by Application (2020-2025) & (USD Million)

Table 68. Global Pellicle Consumption Value by Application (2026-2031) & (USD Million)

Table 69. Global Pellicle Average Price by Application (2020-2025) & (USD/Sqm)

Table 70. Global Pellicle Average Price by Application (2026-2031) & (USD/Sqm)

Table 71. North America Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)

Table 72. North America Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)

Table 73. North America Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 74. North America Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 75. North America Pellicle Sales Quantity by Country (2020-2025) & (K Sqm)

Table 76. North America Pellicle Sales Quantity by Country (2026-2031) & (K Sqm)

Table 77. North America Pellicle Consumption Value by Country (2020-2025) & (USD Million)

Table 78. North America Pellicle Consumption Value by Country (2026-2031) & (USD Million)

Table 79. Europe Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)

Table 80. Europe Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)

Table 81. Europe Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 82. Europe Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 83. Europe Pellicle Sales Quantity by Country (2020-2025) & (K Sqm)

Table 84. Europe Pellicle Sales Quantity by Country (2026-2031) & (K Sqm)

Table 85. Europe Pellicle Consumption Value by Country (2020-2025) & (USD Million)

Table 86. Europe Pellicle Consumption Value by Country (2026-2031) & (USD Million)

Table 87. Asia-Pacific Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)

Table 88. Asia-Pacific Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)

Table 89. Asia-Pacific Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 90. Asia-Pacific Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 91. Asia-Pacific Pellicle Sales Quantity by Region (2020-2025) & (K Sqm)

Table 92. Asia-Pacific Pellicle Sales Quantity by Region (2026-2031) & (K Sqm)

Table 93. Asia-Pacific Pellicle Consumption Value by Region (2020-2025) & (USD Million)

Table 94. Asia-Pacific Pellicle Consumption Value by Region (2026-2031) & (USD Million)

Table 95. South America Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)

Table 96. South America Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)

Table 97. South America Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 98. South America Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 99. South America Pellicle Sales Quantity by Country (2020-2025) & (K Sqm)

Table 100. South America Pellicle Sales Quantity by Country (2026-2031) & (K Sqm)

Table 101. South America Pellicle Consumption Value by Country (2020-2025) & (USD Million)

Table 102. South America Pellicle Consumption Value by Country (2026-2031) & (USD Million)

Table 103. Middle East & Africa Pellicle Sales Quantity by Type (2020-2025) & (K Sqm)

Table 104. Middle East & Africa Pellicle Sales Quantity by Type (2026-2031) & (K Sqm)

Table 105. Middle East & Africa Pellicle Sales Quantity by Application (2020-2025) & (K Sqm)

Table 106. Middle East & Africa Pellicle Sales Quantity by Application (2026-2031) & (K Sqm)

Table 107. Middle East & Africa Pellicle Sales Quantity by Country (2020-2025) & (K Sqm)

Table 108. Middle East & Africa Pellicle Sales Quantity by Country (2026-2031) & (K Sqm)

Table 109. Middle East & Africa Pellicle Consumption Value by Country (2020-2025) & (USD Million)

Table 110. Middle East & Africa Pellicle Consumption Value by Country (2026-2031) & (USD Million)

Table 111. Pellicle Raw Material

Table 112. Key Manufacturers of Pellicle Raw Materials

Table 113. Pellicle Typical Distributors

Table 114. Pellicle Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Pellicle Picture

Figure 2. Global Pellicle Revenue by Type, (USD Million), 2020 & 2024 & 2031

Figure 3. Global Pellicle Revenue Market Share by Type in 2024

Figure 4. Pellicle for Quartz Mask Examples

Figure 5. Pellicle for Soda Mask Examples

Figure 6. Global Pellicle Consumption Value by Application, (USD Million), 2020 & 2024 & 2031

Figure 7. Global Pellicle Revenue Market Share by Application in 2024

Figure 8. Semiconductor Examples

Figure 9. FPD Examples

Figure 10. Others Examples

Figure 11. Global Pellicle Consumption Value, (USD Million): 2020 & 2024 & 2031

Figure 12. Global Pellicle Consumption Value and Forecast (2020-2031) & (USD Million)

Figure 13. Global Pellicle Sales Quantity (2020-2031) & (K Sqm)

Figure 14. Global Pellicle Price (2020-2031) & (USD/Sqm)

Figure 15. Global Pellicle Sales Quantity Market Share by Manufacturer in 2024

Figure 16. Global Pellicle Revenue Market Share by Manufacturer in 2024

Figure 17. Producer Shipments of Pellicle by Manufacturer Sales (\$MM) and Market Share (%): 2024

Figure 18. Top 3 Pellicle Manufacturer (Revenue) Market Share in 2024

Figure 19. Top 6 Pellicle Manufacturer (Revenue) Market Share in 2024

Figure 20. Global Pellicle Sales Quantity Market Share by Region (2020-2031)

Figure 21. Global Pellicle Consumption Value Market Share by Region (2020-2031)

Figure 22. North America Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 23. Europe Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 24. Asia-Pacific Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 25. South America Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 26. Middle East & Africa Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 27. Global Pellicle Sales Quantity Market Share by Type (2020-2031)

Figure 28. Global Pellicle Consumption Value Market Share by Type (2020-2031)

Figure 29. Global Pellicle Average Price by Type (2020-2031) & (USD/Sqm)

Figure 30. Global Pellicle Sales Quantity Market Share by Application (2020-2031)

Figure 31. Global Pellicle Revenue Market Share by Application (2020-2031)

- Figure 32. Global Pellicle Average Price by Application (2020-2031) & (USD/Sqm)
- Figure 33. North America Pellicle Sales Quantity Market Share by Type (2020-2031)
- Figure 34. North America Pellicle Sales Quantity Market Share by Application (2020-2031)
- Figure 35. North America Pellicle Sales Quantity Market Share by Country (2020-2031)
- Figure 36. North America Pellicle Consumption Value Market Share by Country (2020-2031)
- Figure 37. United States Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 38. Canada Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 39. Mexico Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 40. Europe Pellicle Sales Quantity Market Share by Type (2020-2031)
- Figure 41. Europe Pellicle Sales Quantity Market Share by Application (2020-2031)
- Figure 42. Europe Pellicle Sales Quantity Market Share by Country (2020-2031)
- Figure 43. Europe Pellicle Consumption Value Market Share by Country (2020-2031)
- Figure 44. Germany Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 45. France Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 46. United Kingdom Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 47. Russia Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 48. Italy Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 49. Asia-Pacific Pellicle Sales Quantity Market Share by Type (2020-2031)
- Figure 50. Asia-Pacific Pellicle Sales Quantity Market Share by Application (2020-2031)
- Figure 51. Asia-Pacific Pellicle Sales Quantity Market Share by Region (2020-2031)
- Figure 52. Asia-Pacific Pellicle Consumption Value Market Share by Region (2020-2031)
- Figure 53. China Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 54. Japan Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 55. South Korea Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 56. India Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 57. Southeast Asia Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 58. Australia Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 59. South America Pellicle Sales Quantity Market Share by Type (2020-2031)
- Figure 60. South America Pellicle Sales Quantity Market Share by Application (2020-2031)
- Figure 61. South America Pellicle Sales Quantity Market Share by Country (2020-2031)
- Figure 62. South America Pellicle Consumption Value Market Share by Country (2020-2031)
- Figure 63. Brazil Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 64. Argentina Pellicle Consumption Value (2020-2031) & (USD Million)
- Figure 65. Middle East & Africa Pellicle Sales Quantity Market Share by Type

(2020-2031)

Figure 66. Middle East & Africa Pellicle Sales Quantity Market Share by Application
(2020-2031)

Figure 67. Middle East & Africa Pellicle Sales Quantity Market Share by Country
(2020-2031)

Figure 68. Middle East & Africa Pellicle Consumption Value Market Share by Country
(2020-2031)

Figure 69. Turkey Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 70. Egypt Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 71. Saudi Arabia Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 72. South Africa Pellicle Consumption Value (2020-2031) & (USD Million)

Figure 73. Pellicle Market Drivers

Figure 74. Pellicle Market Restraints

Figure 75. Pellicle Market Trends

Figure 76. Porters Five Forces Analysis

Figure 77. Manufacturing Cost Structure Analysis of Pellicle in 2024

Figure 78. Manufacturing Process Analysis of Pellicle

Figure 79. Pellicle Industrial Chain

Figure 80. Sales Channel: Direct to End-User vs Distributors

Figure 81. Direct Channel Pros & Cons

Figure 82. Indirect Channel Pros & Cons

Figure 83. Methodology

Figure 84. Research Process and Data Source

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