

Global Pellicle Mounter Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G6833B642840EN.html>

Date: August 2026

Pages: 138

Price: US\$ 4,480.00 (Single User License)

ID: G6833B642840EN

Abstracts

The global Pellicle Mounter market size is expected to reach \$ 232 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Wafer film mounters are specialized semiconductor back-end and advanced-packaging equipment used to laminate dicing tape, back-grinding protection tape, DAF-integrated tape, UV tape, LC tape, or other functional films onto wafers, dicing frames, metal rings, carriers, or package substrates. These tools may integrate vacuum mounting, roller mounting, tape tension control, film cutting, frame handling, wafer cassette loading, protection-tape removal, re-mounting, heating, ionization, vision alignment, wafer mapping, SECS/GEM communication, and MES data interfaces.

Based on our research, wafer film mounters represent a small but critical equipment segment within semiconductor back-end processing and advanced packaging. The market is much smaller than dicing saws, grinders, bonders, and die attach equipment, but its impact on wafer breakage, dicing stability, ultra-thin wafer handling, DAF lamination quality, and final packaging yield is material. The core value of the equipment is not simply applying a film; it is the controlled, low-stress, bubble-free, low-contamination, and traceable mounting of wafers, frames, and functional films. As 12-inch wafers, ultra-thin wafers, TAIKO structures, SiP, WLP, PLP, and high-density advanced packaging expand, the industry is moving from manual and semi-automatic tools toward fully automatic vacuum mounting, wafer re-mounting, and integrated thinning-mounting systems.

From the supply side, Japanese suppliers remain the strongest group in high-end wafer mounters. LINTEC, Nitto, DISCO, Takatori, Teikoku Taping System, Ohmiya, and Technovision provide a wide range of manual, semi-automatic, fully automatic, vacuum,

and ultra-thin wafer-capable systems. Taiwan, Korea, Europe, and the United States mainly supply regional, R&D, or medium-volume tools. Mainland Chinese suppliers are entering more rapidly, with SINTAIKE, Shanghai Haizhan, Shanghai Jimei, Hwatsing, and Sowotech building capabilities in wafer mounting, detaping, thinning-mounting integration, and WLP/PLP vacuum film systems. However, the high-end 12-inch fully automatic segment still requires longer validation cycles, stronger ultra-thin wafer handling capability, and more proven high-volume customer references.

This report studies the global Pellicle Mounter production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pellicle Mounter 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 Pellicle Mounter that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pellicle Mounter total production and demand, 2021-2032, (Units)

Global Pellicle Mounter total production value, 2021-2032, (USD Million)

Global Pellicle Mounter production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Pellicle Mounter consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Pellicle Mounter domestic production, consumption, key domestic manufacturers and share

Global Pellicle Mounter production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Pellicle Mounter production by Mounting Method, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Pellicle Mounter production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Pellicle Mounter 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 LINTEC Corporation, Nitto Denko Corporation, DISCO Corporation, Takatori Corporation, Teikoku Taping System Co., Ltd., Longhill Industries Limited, N-TEC Corp., SINTAIKE Semiconductor Equipment (Shanghai) Co., Ltd., CUON Solution Co., Ltd., Ohmiya Ind. Co., Ltd., 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 Pellicle Mounter market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Mounting Method, 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 Pellicle Mounter Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pellicle Mounter Market, Segmentation by Mounting Method:

Roller Mounting

Vacuum Mounting

Non-contact / Low-stress Mounting

Heated / Pressure-assisted Mounting

Global Pellicle Mounter Market, Segmentation by Application:

OSAT and Semiconductor Packaging Houses

IDM Back-end Lines

Foundry Back-end / Wafer-level Packaging Lines

Power Semiconductor and Compound Semiconductor Lines

Advanced Packaging R&D and Pilot Lines

Companies Profiled:

LINTEC Corporation

Nitto Denko Corporation

DISCO Corporation

Takatori Corporation

Teikoku Taping System Co., Ltd.

Longhill Industries Limited

N-TEC Corp.

SINTAIKE Semiconductor Equipment (Shanghai) Co., Ltd.

CUON Solution Co., Ltd.

Ohmiya Ind. Co., Ltd.

Technovision Inc.

Powatec GmbH

UVFAB Systems, Inc.

Shanghai Haizhan Automation Equipment Co., Ltd.

Shanghai Jimei Technology Co., Ltd.

Hwatsing Technology Co., Ltd.

Sowotech Advanced Equipment

Zenvoce Corporation

Key Questions Answered:

1. How big is the global Pellicle Mounter market?
2. What is the demand of the global Pellicle Mounter market?
3. What is the year over year growth of the global Pellicle Mounter market?
4. What is the production and production value of the global Pellicle Mounter market?
5. Who are the key producers in the global Pellicle Mounter market?
6. What are the growth factors driving the market demand?

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