

Global Pellicles for EUV Reticles 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 Pellicles for EUV Reticles market size was valued at US\$ 81.1 million in 2024 and is forecast to a readjusted size of USD 174 million by 2031 with a CAGR of 8.4% during review period.

A pellicle for EUV reticles is a membrane used to protect a photomask from contamination while permitting high extreme ultraviolet lithography (EUV) transmission. It is an important part of the lithography process used to create semiconductors.

Initially, the pellicle was a single-layer structure with a core layer made of polysilicon. Since 2021, EUV pellicle have adopted composite materials. Its key components now consist of alternating molybdenum disilicide (MoSi₂) and silicon (Si) layers to form a multi-layer structure. EUV transmittance (EUVT) is a key performance indicator of EUV pellicle. The transition from a single-layer structure to a multi-layer structure has increased EUVT from about 82% to about 90%. The next generation of film technology will go beyond structural changes (from single-layer to multi-layer) and introduce material advances, leading to the emergence of CNT pellicle.

Driven by advances in artificial intelligence (AI) and computing technology, the semiconductor industry's demand for advanced chips continues to grow, with the fastest growth in chips below 7nm manufactured using EUV technology. In advanced processes of 7nm and below, the pattern size on the mask may be only tens of nanometers, which places extremely strict requirements on the uniformity and defect control of the Pellicle. The next generation of high-power EUV lithography machines operates at more than 500W, and EUV films are needed to protect the photomask from particle contamination during chip production.

In recent years, the phenomenon of chipmakers adopting extreme ultraviolet (EUV) processes in their advanced chip manufacturing is rapidly increasing. To meet this growing demand, many companies are developing protective films for EUV processes.

ASML launched its first EUV pellicle in 2019 and licensed the technology to Mitsui Chemicals, which began mass sales in 2021. Since then, ASML has made improvements to its pellicle. It is reported that Mitsui Chemicals' next-generation CNT pellicle production facility will be completed by the end of 2025.

In 2021, South Korean company S&S Tech developed a pellicle with a transmittance of more than 90%. FST's EUV pellicle is still in the development stage.

Canatu has been working with Imec since 2015 to develop CNT pellicle to meet performance targets such as life and transmittance, thermal durability, permeability and strength.

This report is a detailed and comprehensive analysis for global Pellicles for EUV Reticles 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 Pellicles for EUV Reticles market size and forecasts, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2020-2031

Global Pellicles for EUV Reticles market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2020-2031

Global Pellicles for EUV Reticles market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2020-2031

Global Pellicles for EUV Reticles market shares of main players, shipments in revenue

(\$ Million), sales quantity (Sq m), and ASP (US\$/Sq m), 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 Pellicles for EUV Reticles

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 Pellicles for EUV Reticles 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 Chemicals, S&S Tech, Canatu, TSMC, FST, etc.

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

Market Segmentation

Pellicles for EUV Reticles 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

?90% Transmission Rate

?90% Transmission Rate

Market segment by Application

IDM

Foundry

Major players covered

Mitsui Chemicals

S&S Tech

Canatu

TSMC

FST

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 Pellicles for EUV Reticles product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Pellicles for EUV Reticles competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Pellicles for EUV Reticles 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 Pellicles for EUV Reticles 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 Pellicles for EUV Reticles.

Chapter 14 and 15, to describe Pellicles for EUV Reticles sales channel, distributors, customers, research findings and conclusion.

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