

Global High-NA EUV Mask Pellicle Frame Assembly Market Growth 2026-2032

<https://marketpublishers.com/r/GAD395B56A6BEN.html>

Date: July 2026

Pages: 140

Price: US\$ 3,660.00 (Single User License)

ID: GAD395B56A6BEN

Abstracts

The global High-NA EUV Mask Pellicle Frame Assembly market size is predicted to grow from US\$ 176 million in 2025 to US\$ 1147 million in 2032; it is expected to grow at a CAGR of 30.9% from 2026 to 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.

United States market for High-NA EUV Mask Pellicle Frame Assembly is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for High-NA EUV Mask Pellicle Frame Assembly is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for High-NA EUV Mask Pellicle Frame Assembly is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key High-NA EUV Mask Pellicle Frame Assembly players cover ASML, Carl Zeiss SMT, HOYA Corporation, Toppan, FUJIFILM Corporation, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the "High-NA EUV Mask Pellicle Frame Assembly Industry Forecast" looks at past sales and reviews total world High-NA EUV Mask Pellicle Frame Assembly sales in 2025, providing a comprehensive analysis by region and market sector of projected High-NA EUV Mask Pellicle Frame Assembly sales for 2026 through 2032. With High-NA EUV Mask Pellicle Frame Assembly sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world High-NA EUV Mask Pellicle Frame Assembly industry.

This Insight Report provides a comprehensive analysis of the global High-NA EUV Mask Pellicle Frame Assembly landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on High-NA EUV Mask Pellicle Frame Assembly portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High-NA EUV Mask Pellicle Frame Assembly market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High-NA EUV Mask Pellicle Frame Assembly and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global High-NA EUV Mask Pellicle Frame Assembly.

This report presents a comprehensive overview, market shares, and growth opportunities of High-NA EUV Mask Pellicle Frame Assembly market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

- Silicon Frame Assemblies

- Metal Alloy Frame Assemblies

- Ceramic Composite Frame Assemblies

Segmentation by Assembly Structure:

- Adhesive Bonded Frame Assemblies

- Mechanical Clamping Frame Assemblies

- Integrated Pellicle-Frame Assemblies

Segmentation by Frame Height:

- Low Profile??2 mm?

- Medium Profile?2.1?4 mm?

- High Profile??4 mm?

Segmentation by Application:

High-NA EUV Logic Chip Manufacturing

High-NA EUV Memory Chip Manufacturing

Advanced Foundry Process Development

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ASML

Carl Zeiss SMT

HOYA Corporation

Toppan

FUJIFILM Corporation

AGC Inc.

Entegris

S?SS MicroTec

DuPont

3M

Canatu

Shenzhen Qingyi Photomask

Hubei Dinglong

Jiangsu Pacific Quartz

Beijing NMC Coating Technology

Shanghai Simgui Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global High-NA EUV Mask Pellicle Frame Assembly market?

What factors are driving High-NA EUV Mask Pellicle Frame Assembly market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do High-NA EUV Mask Pellicle Frame Assembly market opportunities vary by end market size?

How does High-NA EUV Mask Pellicle Frame Assembly break out by Type, by Application?

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