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Global Pellicle Market Growth 2026-2032

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Abstracts

The global Pellicle market size is predicted to grow from US$ 931 million in 2025 to US$ 1588 million in 2032; it is expected to grow at a CAGR of 8.1% from 2026 to 2032.

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

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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.

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

This Insight Report provides a comprehensive analysis of the global Pellicle 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 Pellicle portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Pellicle market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Pellicle 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 Pellicle.

This report presents a comprehensive overview, market shares, and growth opportunities of Pellicle market by product type, application, key manufacturers and key regions and countries.

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Segmentation by Type:

Pellicle for Quartz Mask

Pellicle for Soda Mask

Segmentation by Application:

Semiconductor

FPD

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

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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.

MITSUI Chemical

FINE SEMITECH

NEPCO

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Shin-Etsu

INKO

S&S Tech

Canatu

Micro Lithography Inc (MLI)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Pellicle market?

What factors are driving Pellicle market growth, globally and by region?

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

How do Pellicle market opportunities vary by end market size?

How does Pellicle break out by Type, by Application?

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