

Global Lithography Equipment Market Size Study & Forecast, by Type (EUV, DUV), Technology (ArF Scanners, KrF Steppers, i-line Steppers, ArF Immersion, Mask Aligners, Others), and Regional Forecasts 2025-2035

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Abstracts

The Global Lithography Equipment Market is valued at approximately USD 27.66 billion in 2024 and is poised to accelerate at an exceptional CAGR of 42.55% over the forecast period of 2025-2035, supported by historical data from 2023 and 2024, with 2024 established as the base year for estimation. Lithography equipment sits at the very core of semiconductor manufacturing, acting as the technological gatekeeper that enables the continuous miniaturization of integrated circuits. By transferring intricate circuit patterns onto silicon wafers with nanometer-scale precision, these systems underpin the production of advanced chips that power everything from smartphones and data centers to electric vehicles and artificial intelligence workloads. As digitalization deepens across industries, lithography equipment has moved from being a niche capital asset to a strategic enabler of global technological competitiveness.

The market's explosive growth trajectory is being carried forward by surging demand for high-performance semiconductors, rapid expansion of advanced packaging technologies, and aggressive capacity investments by foundries and integrated device manufacturers. As chipmakers race to keep pace with Moore's Law and overcome physical scaling barriers, capital expenditure is being funneled into next-generation lithography platforms that can deliver higher throughput, tighter overlay accuracy, and lower defect densities. At the same time, geopolitical realignments, supply chain localization efforts, and government-backed semiconductor incentive programs are amplifying demand for domestic fabrication capabilities, thereby pulling lithography equipment deeper into long-term industrial policy frameworks. While high system costs

and extended development cycles remain structural challenges, relentless innovation continues to push technological boundaries outward.

The detailed segments and sub-segments included in the report are:

By Type:

Extreme Ultraviolet (EUV)

Deep Ultraviolet (DUV)

By Technology:

ArF Scanners

KrF Steppers

i-line Steppers

ArF Immersion

Mask Aligners

Others

By Application:

Advanced Packaging

LED

MEMs

Power Devices

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the different technology pathways, EUV lithography is expected to dominate the Global Lithography Equipment Market over the forecast horizon. EUV systems have emerged as the cornerstone for manufacturing advanced logic and memory nodes, enabling chipmakers to etch ever-smaller features while maintaining yield and performance benchmarks. As demand for high-density chips used in artificial intelligence accelerators, high-performance computing, and next-generation consumer electronics continues to build up, EUV adoption is being scaled across leading-edge fabs. Although DUV technologies remain indispensable for mature nodes and cost-sensitive applications, EUV's role as the dominant growth engine is becoming increasingly pronounced.

From a revenue standpoint, ArF immersion and EUV-based platforms currently command the largest share of market earnings, reflecting their widespread deployment in both advanced logic and memory fabrication lines. These technologies benefit from strong pricing power, long equipment lifecycles, and recurring service revenues tied to maintenance, upgrades, and system optimization. Meanwhile, KrF and i-line steppers continue to hold relevance in power devices, MEMs, and LED manufacturing, where process maturity and cost efficiency take precedence over extreme miniaturization. This multi-technology landscape underscores a market where legacy and frontier solutions coexist, each serving distinct manufacturing priorities.

The Global Lithography Equipment Market exhibits a highly concentrated yet geographically diverse footprint. Asia Pacific dominates overall demand, driven by the

dense concentration of semiconductor fabs in Taiwan, South Korea, Japan, and China, coupled with sustained investments in capacity expansion and technology migration. North America follows closely, supported by robust R&D ecosystems, strong presence of leading equipment manufacturers, and renewed government focus on semiconductor self-sufficiency. Europe maintains a critical position in the value chain, particularly as a hub for advanced equipment innovation and precision engineering. Meanwhile, Latin America and the Middle East & Africa are gradually emerging as peripheral markets, primarily through downstream electronics manufacturing and strategic technology partnerships.

Major market players included in this report are:

ASML Holding N.V.

Nikon Corporation

Canon Inc.

Applied Materials, Inc.

Tokyo Electron Limited

KLA Corporation

Lam Research Corporation

Hitachi High-Tech Corporation

Samsung Electronics Co., Ltd.

Intel Corporation

TSMC

SCREEN Holdings Co., Ltd.

EV Group

Veeco Instruments Inc.

Carl Zeiss SMT GmbH

Global Lithography Equipment Market Report Scope:

Historical Data ? 2023, 2024

Base Year for Estimation ? 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts? working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market size of different segments and countries in recent years and to forecast future values through 2035. The report is designed to balance qualitative insights with quantitative rigor, offering a panoramic view of industry dynamics across the regions studied. It highlights critical growth drivers, emerging constraints, and high-potential micro-markets, while also providing a detailed assessment of the competitive landscape and technology roadmaps of leading players. By integrating strategic analysis with market intelligence, the study equips stakeholders with the clarity required to navigate the rapidly evolving Global Lithography Equipment Market.

Key Takeaways:

Market estimates and forecasts for 10 years from 2025 to 2035.

Annualized revenue analysis at regional and segment levels.

In-depth geographical assessment with country-level insights.

Competitive landscape analysis featuring major market participants.

Evaluation of key business strategies and future growth opportunities.

Analysis of the competitive structure of the market.

Comprehensive demand-side and supply-side market evaluation.

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