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Global 193 nm Scanners Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global 193 nm Scanners market size was valued at US$ 9724 million in 2025 and is forecast to a readjusted size of US$ 15873 million by 2032 with a CAGR of 7.2% during review period.

A 193 nm scanner is a deep ultraviolet lithography system used primarily in front-end wafer fabrication, employing an ArF 193 nm excimer laser and a step-and-scan architecture to transfer high-precision patterns onto 300 mm wafers. It addresses the core manufacturing challenge of balancing resolution, overlay accuracy, CD uniformity, and production throughput for critical and mid-critical layers in advanced logic, DRAM, NAND, image sensors, and selected 3D device and specialty processes. The mainstream technology path is divided into two major routes, dry ArF and ArF immersion. The former continues to serve non-immersion 193 nm fine-patterning layers and selected mature but still precision-demanding patterning tasks, while the latter, supported by 1.35 NA optics, high throughput, low overlay, and compatibility with double and multiple patterning, takes on more advanced-node and higher-criticality volume production layers. Typical customers include foundries, IDMs, memory manufacturers, and selected advanced packaging and R&D lines. The usual commercial model combines tool sales with installation, maintenance, upgrades, productivity optimization, and production support services. Industry barriers are concentrated in projection optics, motion stages, alignment capability, and full-system control.

The most defining characteristic of the 193 nm scanner industry is that it combines extremely high technical barriers, very strong supply concentration, and very long customer qualification cycles. This is not a general equipment segment that can be replicated quickly by a large number of new entrants. Instead, it is a complex high-end

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equipment market built on projection optics, motion stages, alignment and metrology, full-system control, and long-cycle service capability. Based on publicly verifiable official product information, ASML continues to represent the strongest global immersion 193 nm platform capability, with the NXT:2050i and NXT:2100i evolving around overlay performance and multiple-patterning requirements for advanced logic and DRAM. Nikon strengthens coverage of both critical and mid-critical layers through the NSR-S636E and NSR-S625E, while using the NSR-S333F and NSR-S322F to defend the commercial space of dry ArF. Canon, meanwhile, continues its semiconductor lithography equipment business and has brought ArF lithography equipment back into its expansion roadmap. This structure shows that 193 nm scanners are not simply transitional tools displaced by EUV, but rather long-term core infrastructure connecting advanced processes, mature high-precision manufacturing, and multilayer patterning in volume production.

On the demand side, the core value of 193 nm scanners has shifted from merely pursuing smaller feature sizes to optimizing among high resolution, low overlay, capacity release, stable mass production, and process adaptability. Official product disclosures from both ASML and Nikon show that immersion platforms address higher-criticality layers such as advanced logic and DRAM, while dry ArF platforms still maintain clear positions in non-immersion 193 nm layers, logic, memory, sensors, and selected 65 nm-class processes. This means the industry is not driven by a single demand pool, but instead by a layered demand structure in which advanced layers, mid-critical layers, and specialty-device layers coexist. At the same time, image sensors, RF/MEMS, packaging, power devices, and selected specialty manufacturing scenarios are broadening the application scope of 193 nm platforms. Especially when customers prioritize cost per wafer, cross-process versatility, and compatibility with existing production lines, 193 nm scanners can demonstrate attractive return on investment. As a result, the growth logic of the industry over the next several years is more likely to be “advanced demand supporting the ceiling, while broad-based applications raise the floor,” rather than being dependent on a single pull from the most advanced nodes.

From a regional and policy perspective, the 193 nm scanner industry is likely to maintain a clear structure of “a few supply centers with a global demand base.” Production remains concentrated mainly in the Netherlands and Japan, while shipments serve advanced wafer-fabrication customers worldwide and are closely tied to investment cycles in logic, DRAM, NAND, image sensors, and specialty semiconductor manufacturing. Because 193 nm platforms continue to cover critical layers and high-precision volume-production layers, their commercial outlook is not weakened by the presence of EUV. Instead, it is reinforced by multiple patterning, process-layer

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diversification, cost constraints, and the continuity of installed manufacturing bases. It should also be noted that international compliance conditions for advanced manufacturing equipment are increasingly affecting delivery timing and regional sales patterns. ASML's disclosure regarding changes to export licenses for China has already demonstrated that this segment is shaped not only by equipment technology competition, but also by policy, customer mix, and global supply-chain coordination capability. Viewed more optimistically, as long as advanced logic, memory, and specialty semiconductor capacity continues to expand, 193 nm scanners will remain one of the main production tools in many fabs and will continue to unlock new commercial value through service, upgrades, and productivity optimization.

This report is a detailed and comprehensive analysis for global 193 nm Scanners 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 193 nm Scanners market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global 193 nm Scanners market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global 193 nm Scanners market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global 193 nm Scanners market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (US$/Unit), 2021-2026

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 193 nm Scanners

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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 193 nm Scanners 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 ASML, Canon, Nikon, Shanghai Micro Electronics Equipment (SMEE), etc.
This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

193 nm Scanners market is split by Type and by Application. For the period 2021-2032, 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

193 nm Dry Scanners

193 nm Wet Scanners

Market segment by Market Positioning

High-End Advanced Processes

Broad Mature Processes

Market segment by Patterning Complexity

Single-Exposure-Led

Multi-Patterning-Led

Market segment by Application

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Dynamic Random Access Memory (DRAM)

Flash

Logic Devices

Others

Major players covered

ASML

Canon

Nikon

Shanghai Micro Electronics Equipment (SMEE)

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 193 nm Scanners product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of 193 nm Scanners, with price, sales quantity, revenue, and global market share of 193 nm Scanners from 2021 to 2026.

Chapter 3, the 193 nm Scanners competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape

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contrast.

Chapter 4, the 193 nm Scanners breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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 2021 to 2032.

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 2021 to 2026.and 193 nm Scanners market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

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 193 nm Scanners.

Chapter 14 and 15, to describe 193 nm Scanners sales channel, distributors, customers, research findings and conclusion.

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Contents

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3 COMPETITIVE ENVIRONMENT: 193 NM SCANNERS BY MANUFACTURER

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16 APPENDIX

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List Of Tables

LIST OF TABLES

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Table 96. 193 nm Scanners Typical Customers

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List Of Figures

LIST OF FIGURES

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