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Global 193 nm Scanners Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G8EF8AA482B0EN.html
Date: April 2026
Pages: 94
Price: US$ 4,480.00 (Single User License)
ID: G8EF8AA482B0EN

Abstracts

The global 193 nm Scanners market size is expected to reach $ 15873 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

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 equipment market built on projection optics, motion stages, alignment and metrology, full-system control, and long-cycle service capability. Based on publicly verifiable official

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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 diversification, cost constraints, and the continuity of installed manufacturing bases. It should also be noted that international compliance conditions for advanced

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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 studies the global 193 nm Scanners production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 193 nm Scanners and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 193 nm Scanners that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 193 nm Scanners total production and demand, 2021-2032, (Units)

Global 193 nm Scanners total production value, 2021-2032, (USD Million)

Global 193 nm Scanners production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global 193 nm Scanners consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: 193 nm Scanners domestic production, consumption, key domestic manufacturers and share

Global 193 nm Scanners production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global 193 nm Scanners production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global 193 nm Scanners production by Application, production, value, CAGR,

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2021-2032, (USD Million) & (Units)

This report profiles key players in the global 193 nm Scanners market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 193 nm Scanners market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 193 nm Scanners Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Global 193 nm Scanners Market, Segmentation by Type:

193 nm Dry Scanners

193 nm Wet Scanners

Global 193 nm Scanners Market, Segmentation by Market Positioning:

High-End Advanced Processes

Broad Mature Processes

Global 193 nm Scanners Market, Segmentation by Patterning Complexity:

Single-Exposure-Led

Multi-Patterning-Led

Global 193 nm Scanners Market, Segmentation by Application:

Dynamic Random Access Memory (DRAM)

Flash

Logic Devices

Others

Companies Profiled:

ASML

Canon

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Nikon

Shanghai Micro Electronics Equipment (SMEE)

Key Questions Answered:

1. How big is the global 193 nm Scanners market?
2. What is the demand of the global 193 nm Scanners market?
3. What is the year over year growth of the global 193 nm Scanners market?
4. What is the production and production value of the global 193 nm Scanners market?
5. Who are the key producers in the global 193 nm Scanners market?
6. What are the growth factors driving the market demand?

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Contents

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4 UNITED STATES VS CHINA VS REST OF THE WORLD

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7 MARKET ANALYSIS BY PATTERNING COMPLEXITY

8 MARKET ANALYSIS BY APPLICATION

9 COMPANY PROFILES

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12 APPENDIX

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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