

Global ArF Lithography Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G803A53115C3EN.html>

Date: June 2026

Pages: 93

Price: US\$ 4,480.00 (Single User License)

ID: G803A53115C3EN

Abstracts

The global ArF Lithography market size is expected to reach \$ 19764 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

ArF Lithography Equipment refers to semiconductor front-end lithography systems that use a 193nm argon fluoride excimer laser to transfer circuit patterns from a photomask onto a photoresist-coated wafer through a high-precision projection optical system. The industry is mainly divided into ArF dry lithography systems and ArF immersion lithography systems, commonly referred to as ArFi. ArF dry systems are primarily used for mature and specialty process nodes, including 65nm, 90nm, and related derivatives, where cost of ownership, installed-base compatibility, and production stability are critical. ArF immersion systems introduce an immersion medium between the projection lens and the wafer to increase the effective numerical aperture and resolution, making them essential for 45nm, 40nm, 28nm, 22nm, 14nm, and many advanced-node non-EUV layers. ASML's DUV product line includes both ArF immersion and dry ArF systems, while Nikon's NSR-S636E ArF immersion scanner uses a 193nm wavelength, a 1.35 NA lens, and is designed for 300mm wafer production in advanced IC manufacturing.

By product type and application, the two core categories are ArF Immersion Scanners and ArF Dry Scanners/Steppers. ArF immersion tools are used in advanced logic, advanced DRAM, HBM-related DRAM processes, selected 3D NAND critical layers, advanced CIS pixel processes, and many critical or mid-critical patterning layers at sub-28nm nodes. Even after EUV adoption at 7nm, 5nm, 3nm, and beyond, ArFi remains heavily used for non-EUV layers, cost-sensitive layers, and multi-patterning steps supported by advanced overlay correction, focus control, and computational lithography. ArF dry tools serve mature logic, MCU, CIS, analog, power, RF, display

driver ICs, memory peripheral layers, and 200mm/300mm mature-node capacity upgrades. Canon's lithography technology description highlights resolution, overlay accuracy, and throughput as the three major performance characteristics affecting lithography equipment productivity, yield, and device performance, which are also the main directions of ArF system improvement.

From a competitive perspective, the global ArF lithography equipment market is a high-barrier oligopoly. Competition is shaped by system-level integration capability, ArF light-source stability, projection-lens technology, dual-stage architecture, high-speed alignment, immersion-fluid control, thermal aberration management, overlay performance, throughput, system availability, and long-term customer support. ASML is the dominant supplier in ArF immersion and advanced DUV lithography, with its TWINSCAN NXT platform covering multiple generations of ArFi systems and continuously improving overlay, productivity, and process complexity. Nikon remains an active supplier of ArF immersion and dry ArF tools, with the NSR-S636E emphasizing wafer warpage and distortion correction for 3D device manufacturing and ultra-high throughput. Canon remains an important lithography equipment supplier, but its current semiconductor lithography lineup is focused more on KrF, i-line, advanced-packaging i-line, and nanoimprint lithography rather than mainstream ArF immersion competition. Regionally, the supply side is concentrated in the Netherlands and Japan, while demand is concentrated in major wafer-fab regions including mainland China, Taiwan, Korea, the United States, Japan, and Europe. ASML's 2024 annual report shows 374 DUV system units recognized in sales and notes that higher DUV immersion shipments contributed to sales growth, indicating the continuing importance of ArF/DUV tools in wafer-fab capital spending.

From a policy and regional-structure perspective, ArF lithography equipment is one of the most strategic and sensitive parts of the semiconductor manufacturing equipment supply chain. The U.S. CHIPS and Science Act created a USD 52 billion investment framework to strengthen domestic semiconductor manufacturing and R&D, with CHIPS for America administering about USD 50 billion of semiconductor incentives and R&D funding. The European Chips Act aims to reinforce the EU semiconductor ecosystem, improve supply-chain resilience, and reduce external dependencies, while Japan's semiconductor revitalization strategy supports domestic advanced manufacturing, materials, equipment, and supply-chain capabilities. At the same time, ArF immersion tools have become a central focus of export-control policy. The Dutch export control framework announced in 2023 applies to ASML's TWINSCAN NXT:2000i and subsequent immersion systems, and ASML has stated that it will comply with Dutch, EU, and U.S. export regulations. These policy dynamics support long-term fab

investments in the U.S., Europe, Japan, and other regions, while increasing uncertainty for mainland China's access to advanced ArF immersion systems, upgrades, maintenance, and capacity expansion.

From an industry-development and trend perspective, ArF lithography is no longer the newest lithography generation, but it remains one of the most important high-volume patterning platforms in global front-end manufacturing. EUV is used mainly for the most critical layers in leading-edge logic and advanced DRAM, while ArF immersion continues to cover a large number of non-EUV layers, cost-sensitive layers, transition-node layers, and multi-patterning layers. ArF dry tools support the broad mature-node, specialty-process, and installed-base upgrade market. Future growth will be driven by AI/HPC-related leading-edge logic investment, HBM and DRAM technology migration, 3D NAND layer-count expansion, mature-node regionalization, recovery in automotive and industrial semiconductor demand, and mainland China's continued investment in mature and selected advanced-node capacity. SEMI forecasts global semiconductor manufacturing equipment sales to grow from USD 133 billion in 2025 to USD 145 billion in 2026 and USD 156 billion in 2027, with WFE remaining the largest equipment segment and foundry/logic, DRAM, NAND, and China capacity expansion supporting demand. For ArF equipment, the long-term trend is not full replacement by EUV, but layered coexistence with EUV at advanced nodes and continued dominance in mature and specialty nodes, with ongoing improvements in overlay, throughput, process correction, availability, and cost of ownership.

This report studies the global ArF Lithography production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for ArF Lithography 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 ArF Lithography that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global ArF Lithography total production and demand, 2021-2032, (Units)

Global ArF Lithography total production value, 2021-2032, (USD Million)

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

Global ArF Lithography consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: ArF Lithography domestic production, consumption, key domestic

manufacturers and share

Global ArF Lithography production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global ArF Lithography production By Lithography Mode, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global ArF Lithography production By Device Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global ArF Lithography 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, Nikon, 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 ArF Lithography market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$ Million/Unit) by manufacturer, By Lithography Mode, and By Device 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 ArF Lithography Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ArF Lithography Market, Segmentation By Lithography Mode:

ArF Immersion Scanners

ArF Dry Scanners

Global ArF Lithography Market, Segmentation By Customer Type:

IDM

Foundry

Memory Manufacturer

Global ArF Lithography Market, Segmentation By Wafer Size:

300 mm Wafer Systems

200 mm Wafer Systems

Global ArF Lithography Market, Segmentation By Device Application:

Logic and Foundry

DRAM & NAND Flash

CMOS Image Sensors

Analog, Power and Specialty IC

Companies Profiled:

ASML

Nikon

Key Questions Answered:

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

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