

Global DUV 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 DUV Scanners market size was valued at US\$ 14817 million in 2025 and is forecast to a readjusted size of US\$ 24341 million by 2032 with a CAGR of 7.3% during review period.

DUV scanners are core lithography tools in semiconductor manufacturing that transfer circuit patterns from a mask onto wafers through step-and-scan projection with extremely high precision. Their value is not limited to exposure itself, but lies in integrating 193 nm ArF immersion, 193 nm dry ArF, and 248 nm dry KrF light-source routes with projection optics, dual-stage architecture, alignment metrology, focus and leveling control, temperature management, and overlay control into platforms capable of sustained volume production. Official product pages show that these systems serve both critical layers in advanced logic and memory and a broad range of mid-critical and mature-process layers, while also extending into specialty scenarios such as CMOS image sensors. Immersion platforms place greater emphasis on imaging and overlay capability for advanced nodes, whereas dry systems take on wider-volume exposure tasks across more layers with a lower cost of ownership. Across the publicly visible product portfolios, ASML offers a comprehensive TWINSCAN immersion and dry platform family, Nikon covers ArF immersion, dry ArF, and KrF scanners, Canon emphasizes wide-field KrF scanners and full-size CIS exposure, and SMI has publicly disclosed the SSX600 series for 90 nm, 110 nm, and above. As a result, the direct customers for DUV scanners are primarily foundries, IDMs, memory makers, and R&D production lines, while the common delivery model is not a one-time equipment sale, but a combination of tool shipment, installation and acceptance, upgrade packages, process options, software optimization, spare parts, maintenance, and long-term service, with the goal of optimizing yield, throughput, uptime, and cost per pattern transfer at the same time.

The importance of the DUV scanner industry does not lie in being a legacy tool from the pre-EUV era, but in the fact that it still serves as the foundational production platform for the vast majority of semiconductor layers. ASML's official product page makes the industrial logic very clear: within a given chip, only a small number of the most complex layers require EUV, while many more layers are still produced using dry and immersion DUV systems. As long as global capacity additions continue across advanced logic, DRAM, 3D NAND, CMOS image sensors, automotive electronics, and industrial chips, DUV scanners will remain on the main stage of semiconductor manufacturing. More importantly, DUV competitiveness is not defined by resolution alone, but by the balance among resolution, overlay, throughput, uptime, and cost. Nikon centers its product communication on overlay and wafers per hour, Canon combines high productivity with wide-field exposure for CIS applications, and ASML has turned upgrade packages and platform extensibility into a continuous evolution path. Together, these points show that DUV scanners are not static machines, but production platforms that can evolve across both advanced and mature nodes over a long time horizon. Their role in the industry chain therefore remains that of a manufacturing core, not a transitional tool.

From a competitive-structure perspective, DUV scanners are not a standardized market with many participants, but a high-barrier equipment field in which only a very small number of OEMs have maintained core positions for a long time. ASML's strength lies in its full coverage of both immersion and dry platforms and its ability to upgrade installed systems through System Node Enhancement Packages. Nikon retains a complete front-end portfolio spanning ArF immersion, dry ArF, and KrF scanners, and openly publishes key metrics such as resolution, NA, overlay, and throughput, demonstrating system-level capability in precision optics, platform control, and front-end production know-how. Canon has a more focused portfolio, but has built differentiated value in KrF scanners through the combination of high productivity and wide exposure field, especially in CMOS image sensor applications. SMEE's publicly disclosed SSX600 series further indicates that mainland China has already formed a publicly visible domestic supply capability in front-end scan projection equipment for 90 nm, 110 nm, and above. Because this industry requires mastery of optics, motion control, thermal stability, alignment metrology, process adaptation, and long-term service at the same time, the number of integrated OEMs has remained very limited, and that high concentration in turn reinforces both the strategic nature of the industry and the quality of its profit pool.

Looking ahead, the outlook for the DUV scanner industry does not depend solely on the most advanced process nodes, but is also supported by the reshoring of semiconductor

manufacturing, domestic capacity expansion, supply-chain resilience efforts, and the growth of specialty processes. The U.S. Department of Commerce continues to promote manufacturing and supporting capabilities under the CHIPS and Science Act, the European Chips Act emphasizes the reinforcement of the semiconductor ecosystem and supply-chain resilience, and Japan's METI continues to push semiconductor revitalization and the strengthening of related manufacturing systems. The combined result of these policy trends is not merely higher demand for the most cutting-edge equipment, but a broader uplift in mature front-end capacity, specialty processes, advanced packaging, and local equipment qualification. At the same time, production locations will likely remain concentrated in the Netherlands, Japan, and mainland China, while sales and service centers continue to cluster near East Asia and other major global fab hubs. ASML's disclosed site footprint, Nikon's global network, and Canon's service record with TSMC all support that view. In other words, the most attractive part of the industry's future is not a single-point breakout, but a layered expansion driven jointly by high-end immersion platforms, mature dry platforms, dedicated sensor applications, and domestic substitution platforms.

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

Global DUV 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 DUV 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 DUV 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 DUV Scanners

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 DUV 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 Inc., Nikon Corporation, Shanghai Micro Electronics Equipment (Group) Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

DUV 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

248 nm Scanners

193 nm Scanners

Market segment by Exposure Medium

Immersion Scanners

Dry Scanners

Market segment by Technology Route

ArF Scanners

KrF Scanners

Market segment by Application

Logic Chip Manufacturing

Memory Chip Manufacturing

CMOS Image Sensor Manufacturing

Power And Analog Chip Manufacturing

Other Specialty Device Manufacturing

Major players covered

ASML

Canon Inc.

Nikon Corporation

Shanghai Micro Electronics Equipment (Group) Co., Ltd.

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

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

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

Chapter 4, the DUV 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 DUV 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 DUV Scanners.

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

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