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Global EUV Lithography Metrology and Inspection Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global EUV Lithography Metrology and Inspection Equipment market size is expected to reach $ 10044 million by 2032, rising at a market growth of 10.3% CAGR during the forecast period (2026-2032).

EUV lithography metrology and inspection equipment refers to specialized process-control systems used around 13.5 nm extreme ultraviolet lithography to inspect, measure, review, calibrate and control EUV mask blanks, patterned EUV reticles, EUV pellicles, post-lithography and post-etch wafer patterns, and critical lithography process windows. These systems measure and analyze printable defects, critical dimensions, overlay error, pattern placement, reflectivity, phase, film parameters, material properties, three-dimensional profiles and particle contamination. Key technology routes include actinic EUV or soft X-ray inspection, electron-beam imaging, CD-SEM, e-beam inspection and review, optical overlay metrology, optical critical dimension scatterometry, ellipsometry, atomic force microscopy, offline TEM / STEM review, automated defect classification and process-control analytics. The equipment is primarily used in EUV mask manufacturing, wafer-fab incoming reticle quality assurance, scanner and process recipe setup, after-develop and after-etch CD control, overlay control, stochastic defect monitoring, high-NA EUV process development and advanced-node yield ramp.

EUV lithography metrology and inspection equipment should be understood as a mission-critical process-control layer rather than a narrow group of laboratory measurement instruments. The transition from DUV to EUV introduces a reflective multilayer mask architecture, 13.5 nm exposure wavelength, stochastic defects, thinner resists, tighter overlay budgets and a much narrower process window. As a result, fabs

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and mask shops must control not only conventional CD and overlay metrics, but also printable mask defects, mask blank defects, pellicle particles, pattern placement errors, resist profile variation, post-etch CD behavior and defect repeatability across EUV layers. This is why the proper industry scope must include EUV mask and mask blank inspection, reticle registration and flatness metrology, actinic EUV inspection, wafer CD-SEM, e-beam inspection and review, optical overlay, OCD, AFM-based 3D metrology and selected offline high-resolution review systems. Official product evidence from leading suppliers shows that these systems are no longer optional R&D tools; they are deeply embedded in EUV process development, mask qualification, incoming reticle QA and high-volume manufacturing process control.

Demand growth is driven by the increasing number of EUV layers, the transition toward high-NA EUV, advanced logic node migration, advanced DRAM patterning and the need to reduce yield-learning cycles. The demand base is concentrated in leading-edge foundries, logic IDMs, advanced memory manufacturers, EUV mask shops, mask blank suppliers and pellicle-related suppliers. ASML?s 2025 disclosure of 48 EUV system shipments and 208 metrology and inspection system shipments indicates a structural linkage between EUV scanner deployment and process-control equipment demand. Industry association forecasts for continued wafer fab equipment growth further support a positive demand backdrop for EUV-related metrology and inspection.

Technology competition is shifting from single-tool accuracy toward hybrid, high-throughput and data-rich process control. On the mask side, actinic inspection and through-pellicle capability become more important because non-actinic methods may not fully predict wafer printability. On the wafer side, CD-SEM, e-beam review, OCD, optical overlay, AFM and material metrology must be combined to control stochastic defects, resist profile variation and complex 3D structures. High-NA EUV amplifies these challenges by tightening depth of focus and resist process margins. Regional localization efforts will create opportunities for Chinese and regional suppliers in adjacent CD-SEM, optical metrology and defect inspection segments, but the highest-end EUV-dedicated tools will likely remain concentrated among established US, Japanese and European suppliers over the next several years.

From the policy environment and regional supply chain perspective, EUV lithography metrology and inspection equipment has become a strategic control point in the advanced semiconductor ecosystem. Export-control policies in the United States, Japan and allied jurisdictions are tightening access to advanced semiconductor manufacturing equipment, including certain metrology and inspection tools used for advanced-node production. At the same time, the EU?s semiconductor policy framework emphasizes

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supply-chain resilience, technological sovereignty and reduced dependence on external sources. These policy signals reinforce the strategic value of EUV-related process-control equipment, because mask inspection, reticle metrology, CD-SEM, e-beam review, overlay metrology and high-NA EUV 3D metrology directly affect whether leading-edge fabs can ramp yield at 3 nm, 2 nm and beyond. From a regional supply-chain standpoint, the industry remains structurally concentrated in the United States, Japan and Europe, while Korea, Israel and a small number of specialized European start-ups contribute niche capabilities in AFM, materials metrology and 3D process control. China is accelerating domestic substitution in adjacent inspection and metrology segments such as CD-SEM, e-beam inspection, optical metrology, OCD, film metrology and wafer defect inspection, but publicly available evidence still suggests that the highest-end EUV-dedicated tools, especially actinic EUV mask inspection and high-NA EUV process-control platforms, remain dominated by established overseas suppliers. As a result, regionalization will increase investment in local service, application support and selected domestic equipment platforms, but the core supply chain for EUV-specific metrology and inspection is likely to remain highly concentrated over the medium term.

This report studies the global EUV Lithography Metrology and Inspection Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study
Global EUV Lithography Metrology and Inspection Equipment total production and demand, 2021-2032, (Units)
Global EUV Lithography Metrology and Inspection Equipment total production value, 2021-2032, (USD Million)
Global EUV Lithography Metrology and Inspection Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global EUV Lithography Metrology and Inspection Equipment consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: EUV Lithography Metrology and Inspection Equipment domestic production, consumption, key domestic manufacturers and share

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Global EUV Lithography Metrology and Inspection Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global EUV Lithography Metrology and Inspection Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global EUV Lithography Metrology and Inspection Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global EUV Lithography Metrology and Inspection Equipment 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 Holding N.V., Applied Materials, Inc., KLA Corporation, Carl Zeiss AG, Hitachi High-Tech Corporation, Lasertec Corporation, HORIBA, Ltd., Onto Innovation Inc., Nova Ltd., Park Systems Corp., 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 EUV Lithography Metrology and Inspection Equipment 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 EUV Lithography Metrology and Inspection Equipment Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Global EUV Lithography Metrology and Inspection Equipment Market, Segmentation by Type:

EUV Mask Inspection Equipment

Wafer CD Metrology Equipment

Overlay Metrology Equipment

Other Supporting Metrology Equipment

Global EUV Lithography Metrology and Inspection Equipment Market, Segmentation by Measurement Technology:

Actinic EUV Inspection

CD-SEM Metrology

AFM / Probe Metrology

X-ray / Soft X-ray Metrology

Other

Global EUV Lithography Metrology and Inspection Equipment Market, Segmentation by Equipment Deployment Mode:

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Inline Metrology Equipment

Offline Review Equipment

Global EUV Lithography Metrology and Inspection Equipment Market, Segmentation by Application:

Mask Blank Qualification

Lithography Process Setup

High-NA EUV Process Development

Other

Companies Profiled:

ASML Holding N.V.

Applied Materials, Inc.

KLA Corporation

Carl Zeiss AG

Hitachi High-Tech Corporation

Lasertec Corporation

HORIBA, Ltd.

Onto Innovation Inc.

Nova Ltd.

Park Systems Corp.

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Nearfield Instruments B.V.

EUV Tech, Inc.

Key Questions Answered:
1. How big is the global EUV Lithography Metrology and Inspection Equipment market?
2. What is the demand of the global EUV Lithography Metrology and Inspection Equipment market?
3. What is the year over year growth of the global EUV Lithography Metrology and Inspection Equipment market?
4. What is the production and production value of the global EUV Lithography Metrology and Inspection Equipment market?
5. Who are the key producers in the global EUV Lithography Metrology and Inspection Equipment market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 EUV Lithography Metrology and Inspection Equipment Introduction
1.2 World EUV Lithography Metrology and Inspection Equipment Supply & Forecast
  1.2.1 World EUV Lithography Metrology and Inspection Equipment Production Value (2021 & 2025 & 2032)
  1.2.2 World EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
  1.2.3 World EUV Lithography Metrology and Inspection Equipment Pricing Trends (2021-2032)
1.3 World EUV Lithography Metrology and Inspection Equipment Production by Region (Based on Production Site)
  1.3.1 World EUV Lithography Metrology and Inspection Equipment Production Value by Region (2021-2032)
  1.3.2 World EUV Lithography Metrology and Inspection Equipment Production by Region (2021-2032)
  1.3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Region (2021-2032)
  1.3.4 North America EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
  1.3.5 Europe EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
  1.3.6 Japan EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
  1.3.7 Israel EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
  1.3.8 South Korea EUV Lithography Metrology and Inspection Equipment Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 EUV Lithography Metrology and Inspection Equipment Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 EUV Lithography Metrology and Inspection Equipment Major Market Trends

2 DEMAND SUMMARY

2.1 World EUV Lithography Metrology and Inspection Equipment Demand (2021-2032)
2.2 World EUV Lithography Metrology and Inspection Equipment Consumption by

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Region
2.2.1 World EUV Lithography Metrology and Inspection Equipment Consumption by Region (2021-2026)
2.2.2 World EUV Lithography Metrology and Inspection Equipment Consumption Forecast by Region (2027-2032)
2.3 United States EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.4 China EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.5 Europe EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.6 Japan EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.7 South Korea EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.8 ASEAN EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)
2.9 India EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World EUV Lithography Metrology and Inspection Equipment Production Value by Manufacturer (2021-2026)
3.2 World EUV Lithography Metrology and Inspection Equipment Production by Manufacturer (2021-2026)
3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Manufacturer (2021-2026)
3.4 EUV Lithography Metrology and Inspection Equipment Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
3.5.1 Global EUV Lithography Metrology and Inspection Equipment Industry Rank of Major Manufacturers
3.5.2 Global Concentration Ratios (CR4) for EUV Lithography Metrology and Inspection Equipment in 2025
3.5.3 Global Concentration Ratios (CR8) for EUV Lithography Metrology and Inspection Equipment in 2025
3.6 EUV Lithography Metrology and Inspection Equipment Market: Overall Company Footprint Analysis

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3.6.1 EUV Lithography Metrology and Inspection Equipment Market: Region Footprint
3.6.2 EUV Lithography Metrology and Inspection Equipment Market: Company Product Type Footprint
3.6.3 EUV Lithography Metrology and Inspection Equipment Market: Company Product Application Footprint
3.7 Competitive Environment
3.7.1 Historical Structure of the Industry
3.7.2 Barriers of Market Entry
3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Value Comparison
4.1.1 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Value Comparison (2021 & 2025 & 2032)
4.1.2 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Comparison
4.2.1 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: EUV Lithography Metrology and Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: EUV Lithography Metrology and Inspection Equipment Consumption Comparison
4.3.1 United States VS China: EUV Lithography Metrology and Inspection Equipment Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: EUV Lithography Metrology and Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based EUV Lithography Metrology and Inspection Equipment Manufacturers and Market Share, 2021-2026
4.4.1 United States Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value (2021-2026)
4.4.3 United States Based Manufacturers EUV Lithography Metrology and Inspection

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Equipment Production (2021-2026)
4.5 China Based EUV Lithography Metrology and Inspection Equipment Manufacturers and Market Share
4.5.1 China Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value (2021-2026)
4.5.3 China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production (2021-2026)
4.6 Rest of World Based EUV Lithography Metrology and Inspection Equipment Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World EUV Lithography Metrology and Inspection Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 EUV Mask Inspection Equipment
5.2.2 Wafer CD Metrology Equipment
5.2.3 Overlay Metrology Equipment
5.2.4 Other Supporting Metrology Equipment
5.3 Market Segment by Type
5.3.1 World EUV Lithography Metrology and Inspection Equipment Production by Type (2021-2032)
5.3.2 World EUV Lithography Metrology and Inspection Equipment Production Value by Type (2021-2032)
5.3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY MEASUREMENT TECHNOLOGY

6.1 World EUV Lithography Metrology and Inspection Equipment Market Size Overview by Measurement Technology: 2021 VS 2025 VS 2032

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6.2 Segment Introduction by Measurement Technology
6.2.1 Actinic EUV Inspection
6.2.2 CD-SEM Metrology
6.2.3 AFM / Probe Metrology
6.2.4 X-ray / Soft X-ray Metrology
6.2.5 Other
6.3 Market Segment by Measurement Technology
6.3.1 World EUV Lithography Metrology and Inspection Equipment Production by Measurement Technology (2021-2032)
6.3.2 World EUV Lithography Metrology and Inspection Equipment Production Value by Measurement Technology (2021-2032)
6.3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Measurement Technology (2021-2032)

7 MARKET ANALYSIS BY EQUIPMENT DEPLOYMENT MODE

7.1 World EUV Lithography Metrology and Inspection Equipment Market Size Overview by Equipment Deployment Mode: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Equipment Deployment Mode
7.2.1 Inline Metrology Equipment
7.2.2 Offline Review Equipment
7.3 Market Segment by Equipment Deployment Mode
7.3.1 World EUV Lithography Metrology and Inspection Equipment Production by Equipment Deployment Mode (2021-2032)
7.3.2 World EUV Lithography Metrology and Inspection Equipment Production Value by Equipment Deployment Mode (2021-2032)
7.3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Equipment Deployment Mode (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World EUV Lithography Metrology and Inspection Equipment Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Mask Blank Qualification
8.2.2 Lithography Process Setup
8.2.3 High-NA EUV Process Development
8.2.4 Other
8.3 Market Segment by Application

+357 96 030922
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8.3.1 World EUV Lithography Metrology and Inspection Equipment Production by Application (2021-2032)
8.3.2 World EUV Lithography Metrology and Inspection Equipment Production Value by Application (2021-2032)
8.3.3 World EUV Lithography Metrology and Inspection Equipment Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 ASML Holding N.V.
9.1.1 ASML Holding N.V. Details
9.1.2 ASML Holding N.V. Major Business
9.1.3 ASML Holding N.V. EUV Lithography Metrology and Inspection Equipment Product and Services
9.1.4 ASML Holding N.V. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 ASML Holding N.V. Recent Developments/Updates
9.1.6 ASML Holding N.V. Competitive Strengths & Weaknesses
9.2 Applied Materials, Inc.
9.2.1 Applied Materials, Inc. Details
9.2.2 Applied Materials, Inc. Major Business
9.2.3 Applied Materials, Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
9.2.4 Applied Materials, Inc. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Applied Materials, Inc. Recent Developments/Updates
9.2.6 Applied Materials, Inc. Competitive Strengths & Weaknesses
9.3 KLA Corporation
9.3.1 KLA Corporation Details
9.3.2 KLA Corporation Major Business
9.3.3 KLA Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
9.3.4 KLA Corporation EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 KLA Corporation Recent Developments/Updates
9.3.6 KLA Corporation Competitive Strengths & Weaknesses
9.4 Carl Zeiss AG
9.4.1 Carl Zeiss AG Details
9.4.2 Carl Zeiss AG Major Business

+357 96 030922
info@marketpublishers.com

9.4.3 Carl Zeiss AG EUV Lithography Metrology and Inspection Equipment Product and Services
9.4.4 Carl Zeiss AG EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Carl Zeiss AG Recent Developments/Updates
9.4.6 Carl Zeiss AG Competitive Strengths & Weaknesses
9.5 Hitachi High-Tech Corporation
9.5.1 Hitachi High-Tech Corporation Details
9.5.2 Hitachi High-Tech Corporation Major Business
9.5.3 Hitachi High-Tech Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
9.5.4 Hitachi High-Tech Corporation EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Hitachi High-Tech Corporation Recent Developments/Updates
9.5.6 Hitachi High-Tech Corporation Competitive Strengths & Weaknesses
9.6 Lasertec Corporation
9.6.1 Lasertec Corporation Details
9.6.2 Lasertec Corporation Major Business
9.6.3 Lasertec Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
9.6.4 Lasertec Corporation EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Lasertec Corporation Recent Developments/Updates
9.6.6 Lasertec Corporation Competitive Strengths & Weaknesses
9.7 HORIBA, Ltd.
9.7.1 HORIBA, Ltd. Details
9.7.2 HORIBA, Ltd. Major Business
9.7.3 HORIBA, Ltd. EUV Lithography Metrology and Inspection Equipment Product and Services
9.7.4 HORIBA, Ltd. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 HORIBA, Ltd. Recent Developments/Updates
9.7.6 HORIBA, Ltd. Competitive Strengths & Weaknesses
9.8 Onto Innovation Inc.
9.8.1 Onto Innovation Inc. Details
9.8.2 Onto Innovation Inc. Major Business
9.8.3 Onto Innovation Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
9.8.4 Onto Innovation Inc. EUV Lithography Metrology and Inspection Equipment

+357 96 030922
info@marketpublishers.com

Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Onto Innovation Inc. Recent Developments/Updates
9.8.6 Onto Innovation Inc. Competitive Strengths & Weaknesses
9.9 Nova Ltd.
9.9.1 Nova Ltd. Details
9.9.2 Nova Ltd. Major Business
9.9.3 Nova Ltd. EUV Lithography Metrology and Inspection Equipment Product and Services
9.9.4 Nova Ltd. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Nova Ltd. Recent Developments/Updates
9.9.6 Nova Ltd. Competitive Strengths & Weaknesses
9.10 Park Systems Corp.
9.10.1 Park Systems Corp. Details
9.10.2 Park Systems Corp. Major Business
9.10.3 Park Systems Corp. EUV Lithography Metrology and Inspection Equipment Product and Services
9.10.4 Park Systems Corp. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Park Systems Corp. Recent Developments/Updates
9.10.6 Park Systems Corp. Competitive Strengths & Weaknesses
9.11 Nearfield Instruments B.V.
9.11.1 Nearfield Instruments B.V. Details
9.11.2 Nearfield Instruments B.V. Major Business
9.11.3 Nearfield Instruments B.V. EUV Lithography Metrology and Inspection Equipment Product and Services
9.11.4 Nearfield Instruments B.V. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Nearfield Instruments B.V. Recent Developments/Updates
9.11.6 Nearfield Instruments B.V. Competitive Strengths & Weaknesses
9.12 EUV Tech, Inc.
9.12.1 EUV Tech, Inc. Details
9.12.2 EUV Tech, Inc. Major Business
9.12.3 EUV Tech, Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
9.12.4 EUV Tech, Inc. EUV Lithography Metrology and Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 EUV Tech, Inc. Recent Developments/Updates
9.12.6 EUV Tech, Inc. Competitive Strengths & Weaknesses

+357 96 030922
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10 INDUSTRY CHAIN ANALYSIS

10.1 EUV Lithography Metrology and Inspection Equipment Industry Chain
10.2 EUV Lithography Metrology and Inspection Equipment Upstream Analysis
  10.2.1 EUV Lithography Metrology and Inspection Equipment Core Raw Materials
  10.2.2 Main Manufacturers of EUV Lithography Metrology and Inspection Equipment Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 EUV Lithography Metrology and Inspection Equipment Production Mode
10.6 EUV Lithography Metrology and Inspection Equipment Procurement Model
10.7 EUV Lithography Metrology and Inspection Equipment Industry Sales Model and Sales Channels
  10.7.1 EUV Lithography Metrology and Inspection Equipment Sales Model
  10.7.2 EUV Lithography Metrology and Inspection Equipment Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World EUV Lithography Metrology and Inspection Equipment Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World EUV Lithography Metrology and Inspection Equipment Production Value by Region (2021-2026) & (USD Million)
Table 3. World EUV Lithography Metrology and Inspection Equipment Production Value by Region (2027-2032) & (USD Million)
Table 4. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Region (2021-2026)
Table 5. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Region (2027-2032)
Table 6. World EUV Lithography Metrology and Inspection Equipment Production by Region (2021-2026) & (Units)
Table 7. World EUV Lithography Metrology and Inspection Equipment Production by Region (2027-2032) & (Units)
Table 8. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Region (2021-2026)
Table 9. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Region (2027-2032)
Table 10. World EUV Lithography Metrology and Inspection Equipment Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World EUV Lithography Metrology and Inspection Equipment Average Price by Region (2027-2032) & (US$/Unit)
Table 12. EUV Lithography Metrology and Inspection Equipment Major Market Trends
Table 13. World EUV Lithography Metrology and Inspection Equipment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
Table 14. World EUV Lithography Metrology and Inspection Equipment Consumption by Region (2021-2026) & (Units)
Table 15. World EUV Lithography Metrology and Inspection Equipment Consumption Forecast by Region (2027-2032) & (Units)
Table 16. World EUV Lithography Metrology and Inspection Equipment Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key EUV Lithography Metrology and Inspection Equipment Producers in 2025
Table 18. World EUV Lithography Metrology and Inspection Equipment Production by Manufacturer (2021-2026) & (Units)

+357 96 030922
info@marketpublishers.com

Table 19. Production Market Share of Key EUV Lithography Metrology and Inspection Equipment Producers in 2025
Table 20. World EUV Lithography Metrology and Inspection Equipment Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global EUV Lithography Metrology and Inspection Equipment Company Evaluation Quadrant
Table 22. World EUV Lithography Metrology and Inspection Equipment Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and EUV Lithography Metrology and Inspection Equipment Production Site of Key Manufacturer
Table 24. EUV Lithography Metrology and Inspection Equipment Market: Company Product Type Footprint
Table 25. EUV Lithography Metrology and Inspection Equipment Market: Company Product Application Footprint
Table 26. EUV Lithography Metrology and Inspection Equipment Competitive Factors
Table 27. EUV Lithography Metrology and Inspection Equipment New Entrant and Capacity Expansion Plans
Table 28. EUV Lithography Metrology and Inspection Equipment Mergers & Acquisitions Activity
Table 29. United States VS China EUV Lithography Metrology and Inspection Equipment Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China EUV Lithography Metrology and Inspection Equipment Production Comparison, (2021 & 2025 & 2032) & (Units)
Table 31. United States VS China EUV Lithography Metrology and Inspection Equipment Consumption Comparison, (2021 & 2025 & 2032) & (Units)
Table 32. United States Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production (2021-2026) & (Units)
Table 36. United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share (2021-2026)
Table 37. China Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value, (2021-2026) & (USD Million)

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Table 39. China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production, (2021-2026) & (Units)
Table 41. China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share (2021-2026)
Table 42. Rest of World Based EUV Lithography Metrology and Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production, (2021-2026) & (Units)
Table 46. Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share (2021-2026)
Table 47. World EUV Lithography Metrology and Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World EUV Lithography Metrology and Inspection Equipment Production by Type (2021-2026) & (Units)
Table 49. World EUV Lithography Metrology and Inspection Equipment Production by Type (2027-2032) & (Units)
Table 50. World EUV Lithography Metrology and Inspection Equipment Production Value by Type (2021-2026) & (USD Million)
Table 51. World EUV Lithography Metrology and Inspection Equipment Production Value by Type (2027-2032) & (USD Million)
Table 52. World EUV Lithography Metrology and Inspection Equipment Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World EUV Lithography Metrology and Inspection Equipment Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World EUV Lithography Metrology and Inspection Equipment Production Value by Measurement Technology, (USD Million), 2021 & 2025 & 2032
Table 55. World EUV Lithography Metrology and Inspection Equipment Production by Measurement Technology (2021-2026) & (Units)
Table 56. World EUV Lithography Metrology and Inspection Equipment Production by Measurement Technology (2027-2032) & (Units)
Table 57. World EUV Lithography Metrology and Inspection Equipment Production Value by Measurement Technology (2021-2026) & (USD Million)
Table 58. World EUV Lithography Metrology and Inspection Equipment Production

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Value by Measurement Technology (2027-2032) & (USD Million)
Table 59. World EUV Lithography Metrology and Inspection Equipment Average Price by Measurement Technology (2021-2026) & (US$/Unit)
Table 60. World EUV Lithography Metrology and Inspection Equipment Average Price by Measurement Technology (2027-2032) & (US$/Unit)
Table 61. World EUV Lithography Metrology and Inspection Equipment Production Value by Equipment Deployment Mode, (USD Million), 2021 & 2025 & 2032
Table 62. World EUV Lithography Metrology and Inspection Equipment Production by Equipment Deployment Mode (2021-2026) & (Units)
Table 63. World EUV Lithography Metrology and Inspection Equipment Production by Equipment Deployment Mode (2027-2032) & (Units)
Table 64. World EUV Lithography Metrology and Inspection Equipment Production Value by Equipment Deployment Mode (2021-2026) & (USD Million)
Table 65. World EUV Lithography Metrology and Inspection Equipment Production Value by Equipment Deployment Mode (2027-2032) & (USD Million)
Table 66. World EUV Lithography Metrology and Inspection Equipment Average Price by Equipment Deployment Mode (2021-2026) & (US$/Unit)
Table 67. World EUV Lithography Metrology and Inspection Equipment Average Price by Equipment Deployment Mode (2027-2032) & (US$/Unit)
Table 68. World EUV Lithography Metrology and Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World EUV Lithography Metrology and Inspection Equipment Production by Application (2021-2026) & (Units)
Table 70. World EUV Lithography Metrology and Inspection Equipment Production by Application (2027-2032) & (Units)
Table 71. World EUV Lithography Metrology and Inspection Equipment Production Value by Application (2021-2026) & (USD Million)
Table 72. World EUV Lithography Metrology and Inspection Equipment Production Value by Application (2027-2032) & (USD Million)
Table 73. World EUV Lithography Metrology and Inspection Equipment Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World EUV Lithography Metrology and Inspection Equipment Average Price by Application (2027-2032) & (US$/Unit)
Table 75. ASML Holding N.V. Basic Information, Manufacturing Base and Competitors
Table 76. ASML Holding N.V. Major Business
Table 77. ASML Holding N.V. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 78. ASML Holding N.V. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and

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Market Share (2021-2026)
Table 79. ASML Holding N.V. Recent Developments/Updates
Table 80. ASML Holding N.V. Competitive Strengths & Weaknesses
Table 81. Applied Materials, Inc. Basic Information, Manufacturing Base and Competitors
Table 82. Applied Materials, Inc. Major Business
Table 83. Applied Materials, Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 84. Applied Materials, Inc. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Applied Materials, Inc. Recent Developments/Updates
Table 86. Applied Materials, Inc. Competitive Strengths & Weaknesses
Table 87. KLA Corporation Basic Information, Manufacturing Base and Competitors
Table 88. KLA Corporation Major Business
Table 89. KLA Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
Table 90. KLA Corporation EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. KLA Corporation Recent Developments/Updates
Table 92. KLA Corporation Competitive Strengths & Weaknesses
Table 93. Carl Zeiss AG Basic Information, Manufacturing Base and Competitors
Table 94. Carl Zeiss AG Major Business
Table 95. Carl Zeiss AG EUV Lithography Metrology and Inspection Equipment Product and Services
Table 96. Carl Zeiss AG EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Carl Zeiss AG Recent Developments/Updates
Table 98. Carl Zeiss AG Competitive Strengths & Weaknesses
Table 99. Hitachi High-Tech Corporation Basic Information, Manufacturing Base and Competitors
Table 100. Hitachi High-Tech Corporation Major Business
Table 101. Hitachi High-Tech Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
Table 102. Hitachi High-Tech Corporation EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 103. Hitachi High-Tech Corporation Recent Developments/Updates
Table 104. Hitachi High-Tech Corporation Competitive Strengths & Weaknesses
Table 105. Lasertec Corporation Basic Information, Manufacturing Base and Competitors
Table 106. Lasertec Corporation Major Business
Table 107. Lasertec Corporation EUV Lithography Metrology and Inspection Equipment Product and Services
Table 108. Lasertec Corporation EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Lasertec Corporation Recent Developments/Updates
Table 110. Lasertec Corporation Competitive Strengths & Weaknesses
Table 111. HORIBA, Ltd. Basic Information, Manufacturing Base and Competitors
Table 112. HORIBA, Ltd. Major Business
Table 113. HORIBA, Ltd. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 114. HORIBA, Ltd. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. HORIBA, Ltd. Recent Developments/Updates
Table 116. HORIBA, Ltd. Competitive Strengths & Weaknesses
Table 117. Onto Innovation Inc. Basic Information, Manufacturing Base and Competitors
Table 118. Onto Innovation Inc. Major Business
Table 119. Onto Innovation Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 120. Onto Innovation Inc. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Onto Innovation Inc. Recent Developments/Updates
Table 122. Onto Innovation Inc. Competitive Strengths & Weaknesses
Table 123. Nova Ltd. Basic Information, Manufacturing Base and Competitors
Table 124. Nova Ltd. Major Business
Table 125. Nova Ltd. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 126. Nova Ltd. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Nova Ltd. Recent Developments/Updates

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Table 128. Nova Ltd. Competitive Strengths & Weaknesses
Table 129. Park Systems Corp. Basic Information, Manufacturing Base and Competitors
Table 130. Park Systems Corp. Major Business
Table 131. Park Systems Corp. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 132. Park Systems Corp. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Park Systems Corp. Recent Developments/Updates
Table 134. Park Systems Corp. Competitive Strengths & Weaknesses
Table 135. Nearfield Instruments B.V. Basic Information, Manufacturing Base and Competitors
Table 136. Nearfield Instruments B.V. Major Business
Table 137. Nearfield Instruments B.V. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 138. Nearfield Instruments B.V. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Nearfield Instruments B.V. Recent Developments/Updates
Table 140. Nearfield Instruments B.V. Competitive Strengths & Weaknesses
Table 141. EUV Tech, Inc. Basic Information, Manufacturing Base and Competitors
Table 142. EUV Tech, Inc. Major Business
Table 143. EUV Tech, Inc. EUV Lithography Metrology and Inspection Equipment Product and Services
Table 144. EUV Tech, Inc. EUV Lithography Metrology and Inspection Equipment Production (Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. EUV Tech, Inc. Recent Developments/Updates
Table 146. EUV Tech, Inc. Competitive Strengths & Weaknesses
Table 147. Global Key Players of EUV Lithography Metrology and Inspection Equipment Upstream (Raw Materials)
Table 148. Global EUV Lithography Metrology and Inspection Equipment Typical Customers
Table 149. EUV Lithography Metrology and Inspection Equipment Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. EUV Lithography Metrology and Inspection Equipment Picture
Figure 2. World EUV Lithography Metrology and Inspection Equipment Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World EUV Lithography Metrology and Inspection Equipment Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 5. World EUV Lithography Metrology and Inspection Equipment Average Price (2021-2032) & (US$/Unit)
Figure 6. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Region (2021-2032)
Figure 7. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Region (2021-2032)
Figure 8. North America EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 9. Europe EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 10. Japan EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 11. Israel EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 12. South Korea EUV Lithography Metrology and Inspection Equipment Production (2021-2032) & (Units)
Figure 13. EUV Lithography Metrology and Inspection Equipment Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 16. World EUV Lithography Metrology and Inspection Equipment Consumption Market Share by Region (2021-2032)
Figure 17. United States EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 18. China EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 19. Europe EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)

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Figure 20. Japan EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 21. South Korea EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 22. ASEAN EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 23. India EUV Lithography Metrology and Inspection Equipment Consumption (2021-2032) & (Units)
Figure 24. Producer Shipments of EUV Lithography Metrology and Inspection Equipment by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for EUV Lithography Metrology and Inspection Equipment Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for EUV Lithography Metrology and Inspection Equipment Markets in 2025
Figure 27. United States VS China: EUV Lithography Metrology and Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: EUV Lithography Metrology and Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States VS China: EUV Lithography Metrology and Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 30. United States Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share 2025
Figure 31. China Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share 2025
Figure 32. Rest of World Based Manufacturers EUV Lithography Metrology and Inspection Equipment Production Market Share 2025
Figure 33. World EUV Lithography Metrology and Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 34. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Type in 2025
Figure 35. EUV Mask Inspection Equipment
Figure 36. Wafer CD Metrology Equipment
Figure 37. Overlay Metrology Equipment
Figure 38. Other Supporting Metrology Equipment
Figure 39. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Type (2021-2032)
Figure 40. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Type (2021-2032)
Figure 41. World EUV Lithography Metrology and Inspection Equipment Average Price

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by Type (2021-2032) & (US$/Unit)
Figure 42. World EUV Lithography Metrology and Inspection Equipment Production Value by Measurement Technology, (USD Million), 2021 & 2025 & 2032
Figure 43. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Measurement Technology in 2025
Figure 44. Actinic EUV Inspection
Figure 45. CD-SEM Metrology
Figure 46. AFM / Probe Metrology
Figure 47. X-ray / Soft X-ray Metrology
Figure 48. Other
Figure 49. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Measurement Technology (2021-2032)
Figure 50. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Measurement Technology (2021-2032)
Figure 51. World EUV Lithography Metrology and Inspection Equipment Average Price by Measurement Technology (2021-2032) & (US$/Unit)
Figure 52. World EUV Lithography Metrology and Inspection Equipment Production Value by Equipment Deployment Mode, (USD Million), 2021 & 2025 & 2032
Figure 53. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Equipment Deployment Mode in 2025
Figure 54. Inline Metrology Equipment
Figure 55. Offline Review Equipment
Figure 56. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Equipment Deployment Mode (2021-2032)
Figure 57. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Equipment Deployment Mode (2021-2032)
Figure 58. World EUV Lithography Metrology and Inspection Equipment Average Price by Equipment Deployment Mode (2021-2032) & (US$/Unit)
Figure 59. World EUV Lithography Metrology and Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 60. World EUV Lithography Metrology and Inspection Equipment Production Value Market Share by Application in 2025
Figure 61. Mask Blank Qualification
Figure 62. Lithography Process Setup
Figure 63. High-NA EUV Process Development
Figure 64. Other
Figure 65. World EUV Lithography Metrology and Inspection Equipment Production Market Share by Application (2021-2032)
Figure 66. World EUV Lithography Metrology and Inspection Equipment Production

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Value Market Share by Application (2021-2032)
Figure 67. World EUV Lithography Metrology and Inspection Equipment Average Price by Application (2021-2032) & (US$/Unit)
Figure 68. EUV Lithography Metrology and Inspection Equipment Industry Chain
Figure 69. EUV Lithography Metrology and Inspection Equipment Procurement Model
Figure 70. EUV Lithography Metrology and Inspection Equipment Sales Model
Figure 71. EUV Lithography Metrology and Inspection Equipment Sales Channels, Direct Sales, and Distribution
Figure 72. Methodology
Figure 73. Research Process and Data Source

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