

Global Lithography Equipment for Advanced Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Lithography Equipment for Advanced Packaging market size is expected to reach \$ 2956 million by 2032, rising at a market growth of 15.7% CAGR during the forecast period (2026-2032).

Advanced packaging lithography equipment refers to exposure and patterning systems used in middle-end and back-end semiconductor packaging processes. It typically transfers package-level interconnect, redistribution, bump, via and interposer patterns onto photoresist or other photosensitive materials through i-line step-and-repeat projection, UV projection scanning, mask alignment, contact/proximity exposure, maskless digital exposure or large-panel stepper exposure. Its core function is to enable high-precision pattern transfer for RDL, Bump/UBM, TSV, Interposer, Fan-out and FOPLP structures while maintaining overlay accuracy, exposure uniformity and production consistency under thick-resist, large-field, reconstituted wafer, panel-level substrate and multi-die-shift conditions. Key functions include pattern transfer, overlay control, thick-resist exposure, warpage compensation, die-shift correction, backside alignment and panel-level substrate handling. Major applications include WLP, Fan-out, FOWLP, FOPLP, RDL, Bump, UBM, TSV, Interposer, 2.5D/3D packaging, heterogeneous integration, AI/HPC advanced packaging and HBM-related packaging. As advanced packaging moves from traditional wafer-level formats toward high-density interconnects, larger substrates and system-level integration, lithography equipment is evolving from a standalone exposure tool into a platform integrating optics, precision motion, compensation algorithms, process software and customer qualification capabilities.

The global advanced packaging lithography equipment market features a limited

number of core equipment OEMs and multiple technology routes. Unlike front-end lithography, competition in this market is not centered only on ultimate resolution, but also on large-field exposure, thick-resist compatibility, overlay stability, warpage compensation, die-shift correction, substrate handling and production cost. Representative companies include Onto Innovation, Canon, Nikon Precision Inc, Veeco, SUSS Group, SMEE, EV Group (EVG) and ORC Manufacturing. Canon has a strong product base in i-line steppers, Onto Innovation focuses on panel lithography systems for advanced packaging panel applications, SUSS Group covers projection scanners and mask aligners, Veeco serves Cu pillar, Bump, FOWLP and 2.5D/3D applications with mask-based UV projection steppers, EV Group (EVG) promotes maskless exposure lithography for heterogeneous integration, Nikon Precision Inc enters advanced packaging digital lithography with DSP-100, ORC Manufacturing focuses on large-panel steppers, and SMEE represents China's domestic advanced packaging lithography equipment capability.

Advanced packaging lithography equipment can be categorized by product type and application scenario. By product type, major categories include Panel Lithography System, i-line Steppers, Maskless / Digital Lithography, Mask-based UV Projection Stepper, Projection Scanner, Mask Aligner and Large-panel Stepper. i-line steppers and projection scanners remain important production tools in wafer-level advanced packaging processes such as WLP, RDL, Bump and TSV. Mask aligners continue to be used in thick-resist, cost-sensitive and specific alignment processes. Panel lithography systems, maskless / digital lithography and large-panel steppers have higher growth potential in FOPLP, large substrates, multi-layout and die-shift correction scenarios. By application, advanced packaging lithography equipment is mainly used in WLP, Fan-out, RDL, Bump/UBM, TSV, Interposer and FOPLP. WLP and Bump/UBM form the baseline demand. Increasing RDL layers drive more exposure steps and higher overlay requirements. TSV and Interposer support 2.5D/3D and high-bandwidth interconnects. Fan-out and FOPLP increase requirements for large substrate handling, reconstituted wafer warpage compensation and die-shift correction. Future faster-growing directions are expected to include Fan-out, FOPLP, high-density RDL, Interposer and AI/HPC-related 2.5D/3D packaging applications.

From the production side, the core supply of advanced packaging lithography equipment is concentrated in Japan, the U.S., Europe and China. Japan has relatively comprehensive coverage in i-line steppers, digital lithography and large-panel steppers, represented by Canon, Nikon Precision Inc and ORC Manufacturing. The U.S. is competitive in panel lithography systems and mask-based UV projection steppers, represented by Onto Innovation and Veeco. Europe has advantages in projection

scanners, mask aligners and maskless exposure lithography, represented by SUSS Group and EV Group (EVG). China is accelerating domestic adoption of advanced packaging equipment, with SMEE representing local advanced packaging lithography equipment capability. From the demand side, the main consuming regions include China Taiwan, China Mainland, South Korea, the U.S., Japan and Southeast Asia, where advanced packaging manufacturing, OSAT capacity and AI/HPC supply-chain clusters are concentrated. China Taiwan and South Korea have strong demand fundamentals in foundry, OSAT, HBM and advanced packaging investment. China Mainland benefits from OSAT expansion, domestic supply-chain development and advanced packaging line adoption. The U.S. and Japan continue to invest in AI/HPC, Chiplet, semiconductor manufacturing reshoring and advanced packaging R&D. Southeast Asia benefits from OSAT capacity migration and back-end manufacturing expansion. Future regional opportunities will concentrate in regions with dense customer clusters, clear policy support, continuous advanced packaging capacity expansion and strong local supply-chain demand.

Major semiconductor economies continue to support semiconductor manufacturing, advanced packaging, Chiplet, heterogeneous integration, AI computing infrastructure and local supply-chain development. As a key tool for back-end patterning, advanced packaging lithography equipment will benefit from industrial policy and capital expenditure cycles. However, the industry faces high technical barriers and customer adoption hurdles. Key challenges include overlay control, large-field exposure, thick-resist compatibility, substrate warpage compensation, die-shift correction, panel-level substrate handling, long-term equipment stability, customer qualification cycles, concentrated supply of core optics and motion control components, high tool investment and continuous pressure on cost per exposed area. Different technology routes also face substitution and differentiation risks, particularly as maskless / digital lithography, large-panel steppers and traditional i-line steppers compete on cost-performance across different application scenarios. In the coming years, growth in advanced packaging lithography equipment will be driven mainly by AI/HPC, HBM, Fan-out, FOPLP, 2.5D/3D packaging and high-density RDL upgrades. Large-field exposure, high throughput, low-cost patterning, die-shift correction, warpage compensation, maskless exposure, panel-level substrate handling and intelligent process control will become key areas of vendor investment. In the competitive landscape, international leading vendors with mature customer qualification, installed base, process support and service capabilities will remain advantaged, while domestic equipment adoption in China and regional supply-chain restructuring will introduce new market variables. Overall, advanced packaging lithography equipment is evolving from traditional back-end exposure equipment into a core patterning platform supporting heterogeneous integration and system-level

packaging, with rising market potential and strategic value.

This report studies the global Lithography Equipment for Advanced Packaging production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Lithography Equipment for Advanced Packaging total production and demand, 2021-2032, (Units)

Global Lithography Equipment for Advanced Packaging total production value, 2021-2032, (USD Million)

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

Global Lithography Equipment for Advanced Packaging consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Lithography Equipment for Advanced Packaging domestic production, consumption, key domestic manufacturers and share

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

Global Lithography Equipment for Advanced Packaging production by Product Architecture, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Lithography Equipment for Advanced Packaging production by Application Process, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Lithography Equipment for Advanced Packaging 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 Onto Innovation, Canon, Nikon Precision Inc, Veeco, SUSS Group, SMEE, EV Group (EVG), ORC Manufacturing, SCREEN, 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 Lithography Equipment for Advanced Packaging 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 Product Architecture, and by Application Process. 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 Lithography Equipment for Advanced Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Lithography Equipment for Advanced Packaging Market, Segmentation by Product Architecture:

Advanced Packaging Stepper

Panel Lithography System

Mask-based UV Projection Stepper

Mask Aligner

Maskless Exposure Lithography System

Global Lithography Equipment for Advanced Packaging Market, Segmentation by Substrate Format:

200 mm Wafer

300 mm Wafer

Panel Substrate for FOPLP

Global Lithography Equipment for Advanced Packaging Market, Segmentation by End-user Type:

OSAT

Foundry

IDM

Global Lithography Equipment for Advanced Packaging Market, Segmentation by Application Process:

WLP Lithography

Fan-out Lithography

RDL Lithography

Bump / UBM Lithography

TSV Lithography

Interposer Lithography

Other AP Process

Companies Profiled:

Onto Innovation

Canon

Nikon Precision Inc

Veeco

SUSS Group

SMEE

EV Group (EVG)

ORC Manufacturing

SCREEN

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Lithography Equipment for Advanced Packaging Demand (2021-2032)
- 2.2 World Lithography Equipment for Advanced Packaging Consumption by Region
 - 2.2.1 World Lithography Equipment for Advanced Packaging Consumption by Region (2021-2026)
 - 2.2.2 World Lithography Equipment for Advanced Packaging Consumption Forecast by Region (2027-2032)
- 2.3 United States Lithography Equipment for Advanced Packaging Consumption (2021-2032)

- 2.4 China Lithography Equipment for Advanced Packaging Consumption (2021-2032)
- 2.5 Europe Lithography Equipment for Advanced Packaging Consumption (2021-2032)
- 2.6 Japan Lithography Equipment for Advanced Packaging Consumption (2021-2032)
- 2.7 South Korea Lithography Equipment for Advanced Packaging Consumption (2021-2032)
- 2.8 ASEAN Lithography Equipment for Advanced Packaging Consumption (2021-2032)
- 2.9 India Lithography Equipment for Advanced Packaging Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Lithography Equipment for Advanced Packaging Production Value by Manufacturer (2021-2026)
- 3.2 World Lithography Equipment for Advanced Packaging Production by Manufacturer (2021-2026)
- 3.3 World Lithography Equipment for Advanced Packaging Average Price by Manufacturer (2021-2026)
- 3.4 Lithography Equipment for Advanced Packaging Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Lithography Equipment for Advanced Packaging Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Lithography Equipment for Advanced Packaging in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Lithography Equipment for Advanced Packaging in 2025
- 3.6 Lithography Equipment for Advanced Packaging Market: Overall Company Footprint Analysis
 - 3.6.1 Lithography Equipment for Advanced Packaging Market: Region Footprint
 - 3.6.2 Lithography Equipment for Advanced Packaging Market: Company Product Type Footprint
 - 3.6.3 Lithography Equipment for Advanced Packaging 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: Lithography Equipment for Advanced Packaging Production Value Comparison

4.1.1 United States VS China: Lithography Equipment for Advanced Packaging Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Lithography Equipment for Advanced Packaging Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Lithography Equipment for Advanced Packaging Production Comparison

4.2.1 United States VS China: Lithography Equipment for Advanced Packaging Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Lithography Equipment for Advanced Packaging Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Lithography Equipment for Advanced Packaging Consumption Comparison

4.3.1 United States VS China: Lithography Equipment for Advanced Packaging Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Lithography Equipment for Advanced Packaging Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Lithography Equipment for Advanced Packaging Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Lithography Equipment for Advanced Packaging Production Value (2021-2026)

4.4.3 United States Based Manufacturers Lithography Equipment for Advanced Packaging Production (2021-2026)

4.5 China Based Lithography Equipment for Advanced Packaging Manufacturers and Market Share

4.5.1 China Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Lithography Equipment for Advanced Packaging Production Value (2021-2026)

4.5.3 China Based Manufacturers Lithography Equipment for Advanced Packaging Production (2021-2026)

4.6 Rest of World Based Lithography Equipment for Advanced Packaging Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production (2021-2026)

5 MARKET ANALYSIS BY PRODUCT ARCHITECTURE

5.1 World Lithography Equipment for Advanced Packaging Market Size Overview by Product Architecture: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Product Architecture

5.2.1 Advanced Packaging Stepper

5.2.2 Panel Lithography System

5.2.3 Mask-based UV Projection Stepper

5.2.4 Mask Aligner

5.2.5 Maskless Exposure Lithography System

5.3 Market Segment by Product Architecture

5.3.1 World Lithography Equipment for Advanced Packaging Production by Product Architecture (2021-2032)

5.3.2 World Lithography Equipment for Advanced Packaging Production Value by Product Architecture (2021-2032)

5.3.3 World Lithography Equipment for Advanced Packaging Average Price by Product Architecture (2021-2032)

6 MARKET ANALYSIS BY SUBSTRATE FORMAT

6.1 World Lithography Equipment for Advanced Packaging Market Size Overview by Substrate Format: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Substrate Format

6.2.1 200 mm Wafer

6.2.2 300 mm Wafer

6.2.3 Panel Substrate for FOPLP

6.3 Market Segment by Substrate Format

6.3.1 World Lithography Equipment for Advanced Packaging Production by Substrate Format (2021-2032)

6.3.2 World Lithography Equipment for Advanced Packaging Production Value by Substrate Format (2021-2032)

6.3.3 World Lithography Equipment for Advanced Packaging Average Price by Substrate Format (2021-2032)

7 MARKET ANALYSIS BY END-USER TYPE

7.1 World Lithography Equipment for Advanced Packaging Market Size Overview by End-user Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by End-user Type

7.2.1 OSAT

7.2.2 Foundry

7.2.3 IDM

7.3 Market Segment by End-user Type

7.3.1 World Lithography Equipment for Advanced Packaging Production by End-user Type (2021-2032)

7.3.2 World Lithography Equipment for Advanced Packaging Production Value by End-user Type (2021-2032)

7.3.3 World Lithography Equipment for Advanced Packaging Average Price by End-user Type (2021-2032)

8 MARKET ANALYSIS BY APPLICATION PROCESS

8.1 World Lithography Equipment for Advanced Packaging Market Size Overview by Application Process: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application Process

8.2.1 WLP Lithography

8.2.2 Fan-out Lithography

8.2.3 RDL Lithography

8.2.4 Bump / UBM Lithography

8.2.5 TSV Lithography

8.2.6 Interposer Lithography

8.2.7 Other AP Process

8.3 Market Segment by Application Process

8.3.1 World Lithography Equipment for Advanced Packaging Production by Application Process (2021-2032)

8.3.2 World Lithography Equipment for Advanced Packaging Production Value by Application Process (2021-2032)

8.3.3 World Lithography Equipment for Advanced Packaging Average Price by Application Process (2021-2032)

9 COMPANY PROFILES

9.1 Onto Innovation

- 9.1.1 Onto Innovation Details
- 9.1.2 Onto Innovation Major Business
- 9.1.3 Onto Innovation Lithography Equipment for Advanced Packaging Product and Services
- 9.1.4 Onto Innovation Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Onto Innovation Recent Developments/Updates
- 9.1.6 Onto Innovation Competitive Strengths & Weaknesses
- 9.2 Canon
 - 9.2.1 Canon Details
 - 9.2.2 Canon Major Business
 - 9.2.3 Canon Lithography Equipment for Advanced Packaging Product and Services
 - 9.2.4 Canon Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Canon Recent Developments/Updates
 - 9.2.6 Canon Competitive Strengths & Weaknesses
- 9.3 Nikon Precision Inc
 - 9.3.1 Nikon Precision Inc Details
 - 9.3.2 Nikon Precision Inc Major Business
 - 9.3.3 Nikon Precision Inc Lithography Equipment for Advanced Packaging Product and Services
 - 9.3.4 Nikon Precision Inc Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Nikon Precision Inc Recent Developments/Updates
 - 9.3.6 Nikon Precision Inc Competitive Strengths & Weaknesses
- 9.4 Veeco
 - 9.4.1 Veeco Details
 - 9.4.2 Veeco Major Business
 - 9.4.3 Veeco Lithography Equipment for Advanced Packaging Product and Services
 - 9.4.4 Veeco Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Veeco Recent Developments/Updates
 - 9.4.6 Veeco Competitive Strengths & Weaknesses
- 9.5 SUSS Group
 - 9.5.1 SUSS Group Details
 - 9.5.2 SUSS Group Major Business
 - 9.5.3 SUSS Group Lithography Equipment for Advanced Packaging Product and Services
 - 9.5.4 SUSS Group Lithography Equipment for Advanced Packaging Production, Price,

Value, Gross Margin and Market Share (2021-2026)

9.5.5 SUSS Group Recent Developments/Updates

9.5.6 SUSS Group Competitive Strengths & Weaknesses

9.6 SMEE

9.6.1 SMEE Details

9.6.2 SMEE Major Business

9.6.3 SMEE Lithography Equipment for Advanced Packaging Product and Services

9.6.4 SMEE Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 SMEE Recent Developments/Updates

9.6.6 SMEE Competitive Strengths & Weaknesses

9.7 EV Group (EVG)

9.7.1 EV Group (EVG) Details

9.7.2 EV Group (EVG) Major Business

9.7.3 EV Group (EVG) Lithography Equipment for Advanced Packaging Product and Services

9.7.4 EV Group (EVG) Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 EV Group (EVG) Recent Developments/Updates

9.7.6 EV Group (EVG) Competitive Strengths & Weaknesses

9.8 ORC Manufacturing

9.8.1 ORC Manufacturing Details

9.8.2 ORC Manufacturing Major Business

9.8.3 ORC Manufacturing Lithography Equipment for Advanced Packaging Product and Services

9.8.4 ORC Manufacturing Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 ORC Manufacturing Recent Developments/Updates

9.8.6 ORC Manufacturing Competitive Strengths & Weaknesses

9.9 SCREEN

9.9.1 SCREEN Details

9.9.2 SCREEN Major Business

9.9.3 SCREEN Lithography Equipment for Advanced Packaging Product and Services

9.9.4 SCREEN Lithography Equipment for Advanced Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 SCREEN Recent Developments/Updates

9.9.6 SCREEN Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

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

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Lithography Equipment for Advanced Packaging Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Lithography Equipment for Advanced Packaging Production Value by Region (2021-2026) & (USD Million)

Table 3. World Lithography Equipment for Advanced Packaging Production Value by Region (2027-2032) & (USD Million)

Table 4. World Lithography Equipment for Advanced Packaging Production Value Market Share by Region (2021-2026)

Table 5. World Lithography Equipment for Advanced Packaging Production Value Market Share by Region (2027-2032)

Table 6. World Lithography Equipment for Advanced Packaging Production by Region (2021-2026) & (Units)

Table 7. World Lithography Equipment for Advanced Packaging Production by Region (2027-2032) & (Units)

Table 8. World Lithography Equipment for Advanced Packaging Production Market Share by Region (2021-2026)

Table 9. World Lithography Equipment for Advanced Packaging Production Market Share by Region (2027-2032)

Table 10. World Lithography Equipment for Advanced Packaging Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Lithography Equipment for Advanced Packaging Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Lithography Equipment for Advanced Packaging Major Market Trends

Table 13. World Lithography Equipment for Advanced Packaging Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Lithography Equipment for Advanced Packaging Consumption by Region (2021-2026) & (Units)

Table 15. World Lithography Equipment for Advanced Packaging Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Lithography Equipment for Advanced Packaging Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Lithography Equipment for Advanced Packaging Producers in 2025

Table 18. World Lithography Equipment for Advanced Packaging Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Lithography Equipment for Advanced Packaging Producers in 2025

Table 20. World Lithography Equipment for Advanced Packaging Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Lithography Equipment for Advanced Packaging Company Evaluation Quadrant

Table 22. World Lithography Equipment for Advanced Packaging Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Lithography Equipment for Advanced Packaging Production Site of Key Manufacturer

Table 24. Lithography Equipment for Advanced Packaging Market: Company Product Type Footprint

Table 25. Lithography Equipment for Advanced Packaging Market: Company Product Application Footprint

Table 26. Lithography Equipment for Advanced Packaging Competitive Factors

Table 27. Lithography Equipment for Advanced Packaging New Entrant and Capacity Expansion Plans

Table 28. Lithography Equipment for Advanced Packaging Mergers & Acquisitions Activity

Table 29. United States VS China Lithography Equipment for Advanced Packaging Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Lithography Equipment for Advanced Packaging Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Lithography Equipment for Advanced Packaging Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Lithography Equipment for Advanced Packaging Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Lithography Equipment for Advanced Packaging Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Lithography Equipment for Advanced Packaging Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share (2021-2026)

Table 37. China Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Lithography Equipment for Advanced Packaging Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Lithography Equipment for Advanced Packaging Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Lithography Equipment for Advanced Packaging Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share (2021-2026)

Table 42. Rest of World Based Lithography Equipment for Advanced Packaging Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share (2021-2026)

Table 47. World Lithography Equipment for Advanced Packaging Production Value by Product Architecture, (USD Million), 2021 & 2025 & 2032

Table 48. World Lithography Equipment for Advanced Packaging Production by Product Architecture (2021-2026) & (Units)

Table 49. World Lithography Equipment for Advanced Packaging Production by Product Architecture (2027-2032) & (Units)

Table 50. World Lithography Equipment for Advanced Packaging Production Value by Product Architecture (2021-2026) & (USD Million)

Table 51. World Lithography Equipment for Advanced Packaging Production Value by Product Architecture (2027-2032) & (USD Million)

Table 52. World Lithography Equipment for Advanced Packaging Average Price by Product Architecture (2021-2026) & (US\$/Unit)

Table 53. World Lithography Equipment for Advanced Packaging Average Price by Product Architecture (2027-2032) & (US\$/Unit)

Table 54. World Lithography Equipment for Advanced Packaging Production Value by Substrate Format, (USD Million), 2021 & 2025 & 2032

Table 55. World Lithography Equipment for Advanced Packaging Production by Substrate Format (2021-2026) & (Units)

Table 56. World Lithography Equipment for Advanced Packaging Production by Substrate Format (2027-2032) & (Units)

Table 57. World Lithography Equipment for Advanced Packaging Production Value by Substrate Format (2021-2026) & (USD Million)

Table 58. World Lithography Equipment for Advanced Packaging Production Value by

Substrate Format (2027-2032) & (USD Million)

Table 59. World Lithography Equipment for Advanced Packaging Average Price by Substrate Format (2021-2026) & (US\$/Unit)

Table 60. World Lithography Equipment for Advanced Packaging Average Price by Substrate Format (2027-2032) & (US\$/Unit)

Table 61. World Lithography Equipment for Advanced Packaging Production Value by End-user Type, (USD Million), 2021 & 2025 & 2032

Table 62. World Lithography Equipment for Advanced Packaging Production by End-user Type (2021-2026) & (Units)

Table 63. World Lithography Equipment for Advanced Packaging Production by End-user Type (2027-2032) & (Units)

Table 64. World Lithography Equipment for Advanced Packaging Production Value by End-user Type (2021-2026) & (USD Million)

Table 65. World Lithography Equipment for Advanced Packaging Production Value by End-user Type (2027-2032) & (USD Million)

Table 66. World Lithography Equipment for Advanced Packaging Average Price by End-user Type (2021-2026) & (US\$/Unit)

Table 67. World Lithography Equipment for Advanced Packaging Average Price by End-user Type (2027-2032) & (US\$/Unit)

Table 68. World Lithography Equipment for Advanced Packaging Production Value by Application Process, (USD Million), 2021 & 2025 & 2032

Table 69. World Lithography Equipment for Advanced Packaging Production by Application Process (2021-2026) & (Units)

Table 70. World Lithography Equipment for Advanced Packaging Production by Application Process (2027-2032) & (Units)

Table 71. World Lithography Equipment for Advanced Packaging Production Value by Application Process (2021-2026) & (USD Million)

Table 72. World Lithography Equipment for Advanced Packaging Production Value by Application Process (2027-2032) & (USD Million)

Table 73. World Lithography Equipment for Advanced Packaging Average Price by Application Process (2021-2026) & (US\$/Unit)

Table 74. World Lithography Equipment for Advanced Packaging Average Price by Application Process (2027-2032) & (US\$/Unit)

Table 75. Onto Innovation Basic Information, Manufacturing Base and Competitors

Table 76. Onto Innovation Major Business

Table 77. Onto Innovation Lithography Equipment for Advanced Packaging Product and Services

Table 78. Onto Innovation Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 79. Onto Innovation Recent Developments/Updates

Table 80. Onto Innovation Competitive Strengths & Weaknesses

Table 81. Canon Basic Information, Manufacturing Base and Competitors

Table 82. Canon Major Business

Table 83. Canon Lithography Equipment for Advanced Packaging Product and Services

Table 84. Canon Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Canon Recent Developments/Updates

Table 86. Canon Competitive Strengths & Weaknesses

Table 87. Nikon Precision Inc Basic Information, Manufacturing Base and Competitors

Table 88. Nikon Precision Inc Major Business

Table 89. Nikon Precision Inc Lithography Equipment for Advanced Packaging Product and Services

Table 90. Nikon Precision Inc Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Nikon Precision Inc Recent Developments/Updates

Table 92. Nikon Precision Inc Competitive Strengths & Weaknesses

Table 93. Veeco Basic Information, Manufacturing Base and Competitors

Table 94. Veeco Major Business

Table 95. Veeco Lithography Equipment for Advanced Packaging Product and Services

Table 96. Veeco Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Veeco Recent Developments/Updates

Table 98. Veeco Competitive Strengths & Weaknesses

Table 99. SUSS Group Basic Information, Manufacturing Base and Competitors

Table 100. SUSS Group Major Business

Table 101. SUSS Group Lithography Equipment for Advanced Packaging Product and Services

Table 102. SUSS Group Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. SUSS Group Recent Developments/Updates

Table 104. SUSS Group Competitive Strengths & Weaknesses

Table 105. SMEE Basic Information, Manufacturing Base and Competitors

Table 106. SMEE Major Business

Table 107. SMEE Lithography Equipment for Advanced Packaging Product and Services

Table 108. SMEE Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SMEE Recent Developments/Updates

Table 110. SMEE Competitive Strengths & Weaknesses

Table 111. EV Group (EVG) Basic Information, Manufacturing Base and Competitors

Table 112. EV Group (EVG) Major Business

Table 113. EV Group (EVG) Lithography Equipment for Advanced Packaging Product and Services

Table 114. EV Group (EVG) Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. EV Group (EVG) Recent Developments/Updates

Table 116. EV Group (EVG) Competitive Strengths & Weaknesses

Table 117. ORC Manufacturing Basic Information, Manufacturing Base and Competitors

Table 118. ORC Manufacturing Major Business

Table 119. ORC Manufacturing Lithography Equipment for Advanced Packaging Product and Services

Table 120. ORC Manufacturing Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. ORC Manufacturing Recent Developments/Updates

Table 122. ORC Manufacturing Competitive Strengths & Weaknesses

Table 123. SCREEN Basic Information, Manufacturing Base and Competitors

Table 124. SCREEN Major Business

Table 125. SCREEN Lithography Equipment for Advanced Packaging Product and Services

Table 126. SCREEN Lithography Equipment for Advanced Packaging Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. SCREEN Recent Developments/Updates

Table 128. SCREEN Competitive Strengths & Weaknesses

Table 129. Global Key Players of Lithography Equipment for Advanced Packaging Upstream (Raw Materials)

Table 130. Global Lithography Equipment for Advanced Packaging Typical Customers

Table 131. Lithography Equipment for Advanced Packaging Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Lithography Equipment for Advanced Packaging Picture

Figure 2. World Lithography Equipment for Advanced Packaging Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Lithography Equipment for Advanced Packaging Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Lithography Equipment for Advanced Packaging Production (2021-2032) & (Units)

Figure 5. World Lithography Equipment for Advanced Packaging Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Lithography Equipment for Advanced Packaging Production Value Market Share by Region (2021-2032)

Figure 7. World Lithography Equipment for Advanced Packaging Production Market Share by Region (2021-2032)

Figure 8. North America Lithography Equipment for Advanced Packaging Production (2021-2032) & (Units)

Figure 9. Europe Lithography Equipment for Advanced Packaging Production (2021-2032) & (Units)

Figure 10. China Lithography Equipment for Advanced Packaging Production (2021-2032) & (Units)

Figure 11. Japan Lithography Equipment for Advanced Packaging Production (2021-2032) & (Units)

Figure 12. Lithography Equipment for Advanced Packaging Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 15. World Lithography Equipment for Advanced Packaging Consumption Market Share by Region (2021-2032)

Figure 16. United States Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 17. China Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 18. Europe Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 19. Japan Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 20. South Korea Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 21. ASEAN Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 22. India Lithography Equipment for Advanced Packaging Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Lithography Equipment for Advanced Packaging by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Lithography Equipment for Advanced Packaging Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Lithography Equipment for Advanced Packaging Markets in 2025

Figure 26. United States VS China: Lithography Equipment for Advanced Packaging Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Lithography Equipment for Advanced Packaging Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Lithography Equipment for Advanced Packaging Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share 2025

Figure 30. China Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Lithography Equipment for Advanced Packaging Production Market Share 2025

Figure 32. World Lithography Equipment for Advanced Packaging Production Value by Product Architecture, (USD Million), 2021 & 2025 & 2032

Figure 33. World Lithography Equipment for Advanced Packaging Production Value Market Share by Product Architecture in 2025

Figure 34. Advanced Packaging Stepper

Figure 35. Panel Lithography System

Figure 36. Mask-based UV Projection Stepper

Figure 37. Mask Aligner

Figure 38. Maskless Exposure Lithography System

Figure 39. World Lithography Equipment for Advanced Packaging Production Market Share by Product Architecture (2021-2032)

Figure 40. World Lithography Equipment for Advanced Packaging Production Value Market Share by Product Architecture (2021-2032)

Figure 41. World Lithography Equipment for Advanced Packaging Average Price by Product Architecture (2021-2032) & (US\$/Unit)

Figure 42. World Lithography Equipment for Advanced Packaging Production Value by Substrate Format, (USD Million), 2021 & 2025 & 2032

Figure 43. World Lithography Equipment for Advanced Packaging Production Value Market Share by Substrate Format in 2025

Figure 44. 200 mm Wafer

Figure 45. 300 mm Wafer

Figure 46. Panel Substrate for FOPLP

Figure 47. World Lithography Equipment for Advanced Packaging Production Market Share by Substrate Format (2021-2032)

Figure 48. World Lithography Equipment for Advanced Packaging Production Value Market Share by Substrate Format (2021-2032)

Figure 49. World Lithography Equipment for Advanced Packaging Average Price by Substrate Format (2021-2032) & (US\$/Unit)

Figure 50. World Lithography Equipment for Advanced Packaging Production Value by End-user Type, (USD Million), 2021 & 2025 & 2032

Figure 51. World Lithography Equipment for Advanced Packaging Production Value Market Share by End-user Type in 2025

Figure 52. OSAT

Figure 53. Foundry

Figure 54. IDM

Figure 55. World Lithography Equipment for Advanced Packaging Production Market Share by End-user Type (2021-2032)

Figure 56. World Lithography Equipment for Advanced Packaging Production Value Market Share by End-user Type (2021-2032)

Figure 57. World Lithography Equipment for Advanced Packaging Average Price by End-user Type (2021-2032) & (US\$/Unit)

Figure 58. World Lithography Equipment for Advanced Packaging Production Value by Application Process, (USD Million), 2021 & 2025 & 2032

Figure 59. World Lithography Equipment for Advanced Packaging Production Value Market Share by Application Process in 2025

Figure 60. WLP Lithography

Figure 61. Fan-out Lithography

Figure 62. RDL Lithography

Figure 63. Bump / UBM Lithography

Figure 64. TSV Lithography

Figure 65. Interposer Lithography

Figure 66. Other AP Process

Figure 67. World Lithography Equipment for Advanced Packaging Production Market Share by Application Process (2021-2032)

Figure 68. World Lithography Equipment for Advanced Packaging Production Value Market Share by Application Process (2021-2032)

Figure 69. World Lithography Equipment for Advanced Packaging Average Price by Application Process (2021-2032) & (US\$/Unit)

Figure 70. Lithography Equipment for Advanced Packaging Industry Chain

Figure 71. Lithography Equipment for Advanced Packaging Procurement Model

Figure 72. Lithography Equipment for Advanced Packaging Sales Model

Figure 73. Lithography Equipment for Advanced Packaging Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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