

Global Lithography Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Lithography Equipment market size was valued at US\$ 26363 million in 2025 and is forecast to a readjusted size of US\$ 47174 million by 2032 with a CAGR of 7.3% during review period.

Lithography systems are the foundational patterning toolsets that transfer reticle (mask) patterns into photoresist to enable downstream process steps (etch, deposition, implantation, etc.). In practice, the scope spans Semiconductor lithography systems (patterning on silicon wafers with extreme requirements on resolution, overlay/CDU, throughput, and process window) and FPD lithography systems (patterning large glass substrates—typically TFT layers—for LCD and OLED display manufacturing). The FPD domain is structurally differentiated by very large substrate formats and strong emphasis on field size, stitching/alignment across large areas, uniformity, and productivity, while the semiconductor domain pushes the physics limits of wavelength and numerical aperture (NA). A third, fast-growing adjacency is advanced packaging, where lithography is increasingly applied to larger substrates/panels and tighter overlay for redistribution layers (RDL) and panel-level packaging, effectively bridging wafer and FPD know-how.

By product type, semiconductor lithography is commonly segmented into i-line (365 nm), KrF (248 nm), ArF (193 nm, including dry and immersion/ArFi), and EUV (13.5 nm). High-NA EUV raises NA to 0.55 to improve resolution and reduce multipatterning pressure on the most critical layers, marking the next major platform transition for leading-edge nodes. In vendor mapping across the three global semiconductor lithography suppliers: ASML leads wafer-front-end EUV/DUV platforms and is industrializing High-NA EUV (EXE); Canon's lineup covers KrF scanners/steppers, i-

line steppers for FEOL and advanced packaging, and it is also commercializing nanoimprint lithography (NIL) as a differentiated patterning route. Canon's FPA-8000iW extends i-line stepping to large panel substrates (up to ~515x510 mm), enabling ~1.0 µm-class resolution and warped-panel handling for panel-level packaging. Nikon provides semiconductor front-end (including ArF immersion) and back-end/advanced-packaging lithography systems, and maintains a dedicated FPD lithography portfolio, emphasizing TFT patterning for LCD/OLED and scaling toward larger motherglass (e.g., Gen 10.5) with multi-lens wide-area exposure architectures; its DSP-100 digital lithography initiative highlights the convergence of FPD large-substrate technology with semiconductor-grade imaging and overlay requirements for advanced packaging.

Market status and trends are defined by structural concentration at the high end. Public reporting has long characterized ASML as dominant in high-end lithography and effectively the sole commercial supplier of EUV systems, while ASML's 2024 disclosures confirm first High-NA EUV customer installation/delivery and related revenue recognition—evidence that High-NA is moving from prolonged R&D into early industrial deployment. Over the medium term, the realistic industry trajectory is “EUV expansion plus long-cycle coexistence of advanced DUV”: High-NA EUV will be pulled by critical-layer scaling and CoO optimization, while i-line/KrF/ArFi remain supported by mature/specialty-node capacity adds and multipatterning-intensive flows (Nikon has explicitly noted active demand for i-line and KrF production tools in non-miniaturized semiconductors). In FPD, the structural upgrade is “larger motherglass + higher definition + OLED penetration,” driving capability requirements consistent with Gen 10.5 scaling and 4K/8K production optimization; in parallel, advanced packaging's panelization (PLP) increases the strategic value of large-panel lithography platforms such as Canon FPA-8000iW and Nikon DSP-100. The core drivers are AI/HPC and advanced memory demand (lifting lithography intensity per wafer and sustaining fab tool investment), plus geopolitics/export controls that influence tool and software availability (including computational lithography), reinforcing lithography systems as capacity-constraining and strategically sensitive assets.

This report is a detailed and comprehensive analysis for global Lithography Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Exposure Source and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Lithography Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithography Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithography Equipment market size and forecasts, by Exposure Source and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Lithography Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Lithography Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Lithography Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASML, Canon, Nikon, SMEE, etc.

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

Market Segmentation

Lithography Equipment market is split by Exposure Source and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Exposure Source, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Exposure Source

EUV Lithography Systems

ArFi Lithography Systems

ArF dry Lithography Systems

KrF Lithography Systems

I-line Lithography Systems

FPD Lithography Systems

Market segment by Process

Logic

Memory

FPD Lithography Systems

Others

Market segment by Wafer Size

12inch Wafer FAB

8inch Wafer FABackaging Lithography Systems

Flat Panel Display (FPD)

Market segment by Application

Front-end Lithography Systems

Advanced Packaging Lithography Systems

FPD Lithography Systems

Major players covered

ASML

Canon

Nikon

SMEE

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Lithography Equipment product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Lithography Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Exposure Source and by Application, with sales market share and growth rate by Exposure Source, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Lithography Equipment market forecast, by regions, by Exposure Source, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Lithography Equipment.

Chapter 14 and 15, to describe Lithography Equipment sales channel, distributors, customers, research findings and conclusion.

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