

# Global Mask Exposure Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Mask Exposure Equipment market size is expected to reach \$ 2412 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

Mask Exposure Equipment refers to the core “pattern writing/exposure” tools in photomask (reticle) manufacturing that expose an e-beam resist or photoresist coated mask blank; after exposure, the mask flows through develop, etch, clean and inspection steps to become a production reticle used by wafer lithography. Under your scope, the main equipment families are: (1) e-Beam – Single Beam Mask Writers (typically VSB-based), represented by NuFlare’s EBM series (with EBM-9500PLUS positioned for 7nm+/5nm nodes) , JEOL’s JBX e-beam lithography systems used for mask/reticle fabrication , and Vistec’s VSB platform (SB3050-2, marketed for writing on mask or wafer substrates) ; (2) e-Beam – Multi Beam Mask Writers (MBMW), where IMS Nanofabrication is the most visible industrialized supplier, with public materials noting MBMW-301 launched in 2023 for 2nm-era requirements ; and (3) Laser Beam Mask Writers, primarily used for mature-node masks and cost-efficient, high-throughput mask production as well as R&D/low-volume mask making—Mycronic positions SLX as laser-based mask writers with cost advantages , while Heidelberg Instruments offers ULTRA for mature semiconductor photomask production and DWL 66+ for direct writing and low-volume mask making .

Technically, single-beam e-beam mask writing has long been dominated by VSB (variable shaped beam), leveraging high current density, variable beam shaping and high-precision stage/field stitching to balance resolution, CDU and write time. NuFlare explicitly cites variable electron beam technology, high current density and a low-COO positioning, and specifies EBM-9500PLUS compatibility for 7nm+/5nm nodes. As nodes

shrink and OPC/ILT data density rises, write-time becomes a first-order constraint: a SPIE 2025 comparative study notes that writing time can rise significantly with scaling, potentially reaching “several tens of hours,” which is a central motivation for multi-beam productivity platforms. Academic/industry publications also describe MBMW as having disrupted mask writing over the past decade and expanding the application space, aligning with the industry narrative around MBMW-301 and beyond. For laser mask writers, the key value proposition is lower exposure cost per mask and high throughput for mature masks: Mycronic’s product page states industry preference for laser-based writers due to lower exposure cost and claims a majority share of masks produced by laser technology; ULTRA is marketed specifically for mature semiconductor photomasks, while DWL 66+ emphasizes flexible direct-write and low-volume mask making.

From an applications/value-chain and competitive standpoint, mask exposure equipment serves merchant and captive mask shops producing DUV/EUV reticles (and, in some cases, NIL templates/masters). Upstream dependencies include electron optics/high-voltage columns, ultra-precision stages and interferometric metrology, massive data-path and fracturing infrastructure, plus mask blanks and resist/process ecosystems. Competition is stratified: advanced single-beam e-beam writing is represented by NuFlare, JEOL and Vistec ; multi-beam industrialization is strongly associated with IMS MBMW and a product roadmap described publicly down to 2nm-class needs ; laser mask writing for mature-node cost/performance is led by vendors such as Mycronic, with technical literature discussing renewal of high-throughput laser photomask writers. Key trends/drivers include rising EUV/advanced-node mask complexity and write-time pressure (accelerating MBMW adoption and capacity build-out) , sustained mature-node volume and cost constraints (supporting laser-based writers) , and continuous upgrades in automation, stability, and data throughput to improve TAT, yield, and COO across both VSB and MBMW platforms.

This report studies the global Mask Exposure Equipment production, demand, key manufacturers, and key regions.

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

## **Highlights and key features of the study**

Global Mask Exposure Equipment total production and demand, 2021-2032, (Units)

Global Mask Exposure Equipment total production value, 2021-2032, (USD Million)

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

Global Mask Exposure Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Mask Exposure Equipment domestic production, consumption, key domestic manufacturers and share

Global Mask Exposure Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Mask Exposure Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Mask Exposure Equipment production by Wafer Size, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Mask Exposure 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 NuFlare Technology, IMS Nanofabrication, Applied Materials, Mycronic, Heidelberg Instruments, JEOL, Elionix Inc., Vistec Electron Beam GmbH, Raith, Crestec, 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 Mask Exposure 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 Wafer Size. 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 Mask Exposure Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Mask Exposure Equipment Market, Segmentation by Type:

e-Beam - Single Beam Mask Writer

e-Beam - Multi Beam Mask Writer

Laser Beam - Mask Writer

#### Global Mask Exposure Equipment Market, Segmentation by Application:

Advanced Process Mask

Mature Process Mask

Scientific Research and Special Processes

#### Global Mask Exposure Equipment Market, Segmentation by Wafer Size:

300mm Mask Exposure Equipment

200mm Mask Exposure Equipment

Others

Companies Profiled:

NuFlare Technology

IMS Nanofabrication

Applied Materials

Mycronic

Heidelberg Instruments

JEOL

Elionix Inc.

Vistec Electron Beam GmbH

Raith

Crestec

NanoBeam

**Key Questions Answered:**

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

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