

# Global Semiconductor Patterning Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G9119D88EF6DEN.html>

Date: January 2026

Pages: 142

Price: US\$ 3,480.00 (Single User License)

ID: G9119D88EF6DEN

## Abstracts

According to our (Global Info Research) latest study, the global Semiconductor Patterning Equipment market size was valued at US\$ 30316 million in 2025 and is forecast to a readjusted size of US\$ 47077 million by 2032 with a CAGR of 6.9% during review period.

Under the scope you specified, Semiconductor Patterning Equipment is the lithography-centered tool set enabling pattern definition, comprising three subsystems: Wafer Patterning Equipment, Mask Writer, and Resist Processing Equipment. Wafer patterning covers: (1) Steppers and Scanners for projection lithography across DUV immersion and EUV/High-NA EUV generations; (2) Mask Aligners for contact/proximity exposure and alignment in advanced packaging, MEMS and specialty flows; and (3) Imprint Lithography (NIL) using template pressing to replicate fine patterns on selected layers. Mask writers generate the reticles/templates required by exposure tools (advanced nodes rely primarily on e-beam), while resist processing tracks (coater/developer) run next to scanners to execute coat/bake/develop/rinse and defect control—explicitly described by Tokyo Electron as coating/developing photoresist for wafers that are patterned by stepper/scanner exposure.

Technologically, scanners are differentiated by resolution, overlay, throughput and stability: on DUV, ArF immersion platforms (e.g., ASML's TWINSCAN NXT family) support critical-layer patterning and multi-patterning at advanced nodes; on EUV, ASML positions EXE as High-NA EUV (0.55 NA) to push resolution further, with ongoing industry discussion on process simplification versus tool energy/complexity trade-offs. In non-projection patterning, SUSS highlights mask aligners designed for substrates up to 300 mm across diverse applications, while NIL platforms emphasize contamination

control and alignment: Canon's FPA-1200NZ2C stresses environment control to suppress fine-particle contamination for high-precision alignment; EVG's EVG770 NT highlights step-and-repeat NIL for master fabrication or direct patterning and scalability to large-area substrates. In mask writing, advanced photomasks are primarily written by e-beam: NuFlare's EBM-9500PLUS targets production masks for 7nm+/5nm nodes, while IMS describes its multi-beam mask writer (MBMW) roadmap and use cases down to leading-edge nodes (including MBMW-301 positioned for 2nm-era performance). Laser-beam direct-write tools are more commonly used for R&D and low-volume mask making (e.g., Heidelberg DWL 66+ described as direct-write lithography and low-volume mask making). On resist processing, TEL's LITHIUS is positioned as a 300mm coater/developer with OEE/CoO focus; SCREEN's DT-3000 (SOKUDO DUO) runs dual parallel lines to boost throughput; TEL's 2025 release further emphasizes defect-control and productivity improvements.

From a competitive and market perspective, this segment is structurally characterized by high concentration and strong ecosystem coupling. EUV/High-NA EUV and high-end DUV scanning are controlled by a small set of suppliers (ASML's published High-NA EXE direction; Nikon's ArF immersion offerings for critical layers), while mask aligners and NIL form a broader competitive field in advanced packaging, MEMS and specialty applications (SUSS/Canon/EVG with differentiated platforms). Mask writing for leading nodes is likewise concentrated: VSB e-beam production tools (NuFlare) and multi-beam productivity platforms (IMS) reflect the rising write-time and precision requirements of advanced masks, while laser direct-write remains a niche for R&D/low-volume use. Resist processing is dominated by high-volume track platforms (TEL and SCREEN) competing on defectivity, throughput, footprint and OEE. On industry conditions and drivers, SEMI projects total semiconductor equipment sales rising from \$133B (2025) to \$145B (2026) and \$156B (2027), with growth driven primarily by AI-related investment in leading-edge logic, memory, and advanced packaging—directly underpinning demand for advanced scanners, higher-capacity mask writing, and high-OEE resist tracks.

This report is a detailed and comprehensive analysis for global Semiconductor Patterning Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Wafer Size. 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 Semiconductor Patterning Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

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

Global Semiconductor Patterning Equipment market size and forecasts, by Type and by Wafer Size, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Semiconductor Patterning Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K 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 Semiconductor Patterning 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 Semiconductor Patterning 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, Nikon, Canon, SMEE, IMS Nanofabrication, NuFlare Technology, TEL (Tokyo Electron Ltd.), KINGSEMI, SUSS Group, SCREEN, etc.

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

### **Market Segmentation**

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

### Market segment by Type

Semiconductor Steppers and Scanners

Mask Writer

Resist Processing Equipment

Others

### Market segment by Application

Foundry and Logic Equipment

NAND Equipment

DRAM Equipment

Others

### Market segment by Process

IC Patterning Equipment

Advanced Packaging Patterning Equipment

### Market segment by Wafer Size

300mm Patterning Equipment

200mm Patterning Equipment

Others

## Major players covered

ASML

Nikon

Canon

SMEE

IMS Nanofabrication

NuFlare Technology

TEL (Tokyo Electron Ltd.)

KINGSEMI

SUSS Group

SCREEN

EV Group (EVG)

TAZMO

SEMES

PNC Technology Group

Obducat

ELS System Technology

Litho Tech Japan Corporation

LithExx-Systems

JEOL

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 Semiconductor Patterning Equipment product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Semiconductor Patterning 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 Type and by Wafer Size, with sales market share and growth rate by Type, by Wafer Size, 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 Semiconductor Patterning Equipment market forecast, by regions, by Type, and by Wafer Size, 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

Semiconductor Patterning Equipment.

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

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