

Global ArF Immersion Lithography Ultrapure Water Degassing System Market Growth 2026-2032

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Abstracts

The global ArF Immersion Lithography Ultrapure Water Degassing System market size is predicted to grow from US\$ 20.62 million in 2025 to US\$ 33.33 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

ArF Immersion Lithography Ultrapure Water Degassing Systems are specialized fluid treatment systems and functional modules used at the point of use of 193 nm ArF immersion lithography equipment to control dissolved gases and microbubbles in ultrapure water entering the exposure area. Their core function is to maintain a stable immersion medium between the projection lens and the wafer by reducing dissolved oxygen, nitrogen, and other gases while maintaining stringent control over water quality, pressure, flow, and temperature, thereby minimizing the impact of bubbles and fluid fluctuations on imaging performance and defect control. Major product configurations include integrated POU water treatment systems, standalone degassing systems, and degassing modules. Mainstream technologies include membrane contactor degassing, direct vacuum degassing, and hybrid multi-stage degassing. High-performance systems can achieve sub-ppb dissolved oxygen levels and integrate degassing with the control of total organic carbon, ions, particles, pressure, temperature, and other water-quality and process parameters. This study focuses on systems and modules whose value is directly attributable to ultrapure water degassing for ArF immersion lithography, with Logic and DRAM wafer manufacturing as the primary downstream applications.

Key Findings

In 2025, the weighted equivalent selling price of newly installed ArF immersion lithography ultrapure water degassing systems was approximately US\$95,000 per unit.

Membrane contactor degassing remains the mainstream technology.

High-end commercial systems can achieve dissolved oxygen levels below 1 ppb, with typical configurations reaching 0.2–0.4 ppb.

Logic and DRAM are the two major downstream applications.

North America maintains a strong position in system-level supply capabilities.

Market Trends

The most evident technology trend is the transition from standalone dissolved gas removal toward integrated POU fluid conditioning. Advanced immersion lithography requires control not only of dissolved oxygen but also TOC, ions, silica, particles, temperature, pressure, and flow. As a result, degassing is increasingly integrated with purification, circulation, filtration, heat exchange, and online monitoring. Related systems from Entegris and Xylem both reflect this development direction. Another trend is the continued tightening of dissolved oxygen specifications. Sub-ppb performance is becoming an important feature of high-end systems, raising requirements for membrane mass-transfer efficiency, vacuum stability, low-extractable fluid paths, and overall system cleanliness. Hybrid configurations combining membrane degassing with other oxygen-removal methods also have development potential for applications requiring extremely low dissolved oxygen and higher process stability.

Market Dynamics

The market has entered a mature stage but retains strong structural resilience. Growth is no longer driven primarily by the initial adoption of immersion lithography, but by continued deployment of ArF immersion lithography systems, expansion of advanced logic and memory capacity, refurbishment and relocation of installed equipment, and periodic replacement of degassing membranes and fluid-control components. Global demand for DUV equipment remained at a relatively high level in 2025, while immersion DUV production capacity remained substantial in 2026. Further capacity expansion plans also provide support for related water-treatment subsystems. The market is therefore developing toward a structure characterized by relatively stable demand for new installations and steadily expanding demand from the installed base and system upgrades.

Drivers

The continued use of ArF immersion lithography in advanced semiconductor manufacturing remains the fundamental demand driver. EUV has reduced reliance on ArF multiple patterning for some advanced critical layers, but immersion DUV remains an important part of Logic and DRAM manufacturing flows, while expansion of advanced logic and memory capacity continues to support related equipment demand. At the subsystem level, increasingly stringent defect-control requirements are another major driver. Immersion water must maintain extremely low dissolved gas levels, stable pressure and temperature, and exceptionally high cleanliness, and commercial POU systems continue to evolve around these requirements. In addition, as the global installed base of ArF immersion lithography systems expands, periodic replacement of membrane modules, pumps, sensors, and fluid-control components, together with system upgrades, is creating more stable recurring demand.

Restraints

The primary restraint is the narrow application scope of the market. These systems are mainly used in ArF immersion lithography rather than across the broader semiconductor ultrapure water market, which naturally limits global equipment demand and creates strong dependence on a small number of lithography platforms and advanced wafer fabs. EUV penetration also represents a long-term structural constraint because its adoption in some advanced critical layers reduces the need for ArF immersion multiple patterning. At the same time, qualification cycles are lengthy. Wetted materials, dissolved gas levels, particle generation, extractables, reliability, and temperature and pressure stability must all undergo stringent validation. Suppliers with conventional semiconductor UPW or degassing capabilities therefore cannot easily enter the immersion lithography supply chain, resulting in relatively high technical and customer qualification barriers.

Opportunities

The clearest medium-term opportunities come from additional ArF immersion lithography capacity and upgrades to the installed base rather than a rapid expansion in the number of customers. Continued expansion of immersion DUV capacity is expected to support demand for POU water treatment systems, degassing modules, and high-purity fluid components. Retrofit and upgrade demand also offers attractive opportunities. As older immersion lithography systems remain in operation or are relocated between wafer fabs, dissolved gas control, filtration, temperature control, monitoring, and degassing modules may require upgrading or requalification. Regional

supply-chain localization represents another opportunity, particularly as China strengthens domestic capabilities in ultra-clean fluid control and degassing membranes. For new entrants, gaining qualification through degassing modules and critical subsystems is generally more practical than directly replacing complete POU platforms.

Challenges

The core technical challenge is achieving extremely low dissolved gas levels without introducing additional particles, pressure fluctuations, flow disturbances, or material extractables. Degassing performance cannot be evaluated independently from TOC, particle control, temperature stability, and overall system cleanliness. Suppliers therefore require multidisciplinary capabilities in membrane technology, vacuum engineering, ultrapure fluid handling, instrumentation, and system control. Xylem's related POU systems can achieve typical dissolved oxygen levels of 0.2–0.4 ppb while maintaining TOC below 1 ppb, illustrating the comprehensive water-quality requirements of high-end systems. Another challenge is limited market transparency. Degassing functions are often embedded within larger UPW polishing or lithography support systems, and suppliers rarely disclose separate revenue, shipment volume, or average selling prices for degassing systems. Concentration in critical membranes, high-purity fluid materials, and key components also increases supply-chain management risks.

Industry Chain Analysis

Upstream suppliers mainly provide hydrophobic hollow-fiber membranes and membrane contactors, high-purity fluoropolymers such as PFA, vacuum pumps and vacuum-control components, ultrapure water pumps, valves and fittings, dissolved oxygen and resistivity monitoring instruments, heat exchangers, filtration elements, and electronic control components. Midstream companies integrate these components into degassing modules, standalone degassing systems, or complete POU ultrapure water conditioning systems. Because wetted fluid paths themselves can become contamination sources, high-purity material selection and ultra-clean manufacturing are critical. Downstream demand mainly comes from wafer fabs using ArF immersion lithography for Logic and DRAM manufacturing. These systems are typically installed between the central ultrapure water infrastructure and lithography equipment, forming a dedicated POU interface between fab utilities and critical process equipment. Degassing generally operates together with purification, filtration, temperature control, and pressure management rather than as an isolated general-purpose water-treatment process.

Value Chain Analysis

Product value increases significantly from individual membrane materials and general fluid-handling components to qualified degassing modules and complete POU systems. At the membrane and component level, value is primarily determined by gas-transfer efficiency, chemical compatibility, cleanliness, and service life. Degassing modules add value through vacuum design, flow distribution, sealing reliability, and dissolved gas control. Complete systems command higher value through ultra-clean integration, automated control, pressure and temperature stability, online monitoring, customer qualification, and long-term field support. According to this report's estimates, the weighted equivalent selling price of a newly installed system was approximately US\$95,000 per unit in 2025, significantly higher than the value of an individual membrane contactor. After initial installation, replacement modules, preventive maintenance, field service, and system upgrades continue to generate lifecycle revenue, meaning that expansion of the installed base will gradually increase the importance of aftermarket and upgrade demand.

Segment Insights

By degassing technology, membrane contactor degassing remains the mainstream route. It uses hydrophobic hollow fibers to create a stable gas-liquid mass-transfer interface suitable for dissolved gas control in high-purity water. Direct vacuum degassing is mainly used in standalone degassing systems, while hybrid degassing combines multiple gas-removal or oxygen-removal mechanisms to achieve lower dissolved oxygen levels and greater process stability. By product configuration, integrated POU water treatment systems occupy the higher-value segment because degassing is combined with purification, filtration, monitoring, and temperature and pressure control. Standalone degassing systems and replaceable degassing modules represent the other two major product forms. By membrane material, the principal routes include polypropylene, polymethylpentene, and fluoropolymers. By downstream application, Logic and DRAM are the most important segments. By purchase type, the market can be divided into new installations, retrofits and upgrades, and replacement modules and spare parts, with the latter two becoming increasingly important as the installed base expands.

Downstream Market Opportunities

Logic semiconductor manufacturing remains an important source of demand because

advanced process flows do not completely replace all DUV immersion layers with EUV. Instead, EUV and ArF immersion lithography are used in combination across different patterning steps. DRAM represents another major opportunity, supported by increasing structural complexity in advanced memory devices and continued capacity investment. Beyond new fab construction, the installed base is becoming a more sustainable source of market opportunities. Refurbishment of older tools, relocation between wafer fabs, production-line conversion, and tighter process windows may all trigger requalification or upgrades of POU water systems. Because the degassing subsystem represents only a small proportion of total lithography equipment value but directly affects water quality and defect control, subsystem upgrades can offer attractive economics by improving process stability without replacing the entire lithography system.

Regional Insights

North America currently has a strong supply base in validated integrated POU water treatment systems and high-purity fluid-management technologies, supported by a mature semiconductor equipment subsystem ecosystem. Japan has accumulated deep expertise in ultrapure water engineering, hollow-fiber membranes, vacuum degassing, and semiconductor-grade fluid components, giving it an important position in degassing modules and enabling technologies. China is gradually shifting from relatively high import dependence toward localization of ultra-clean fluid control and degassing membranes, although publicly verifiable large-scale ArF immersion installations and long-term qualification references remain more limited than in mature supplier regions. South Korea and Taiwan are major demand centers due to their large advanced logic and memory wafer manufacturing bases, while local supply is more concentrated in semiconductor UPW systems, specialized modules, and related components. Europe has fewer dedicated suppliers but remains strategically important due to its lithography equipment ecosystem, high-purity engineering capabilities, and semiconductor process technologies.

Competitive Landscape Analysis

Competition is relatively concentrated at the complete-system level but more diversified across degassing modules and critical components. North American suppliers hold advantages in complete POU conditioning systems and high-purity fluid-management technologies, while Japanese suppliers are more concentrated in specialized degassing equipment, membrane technologies, and ultrapure water engineering. Chinese suppliers are entering through ultra-clean fluid-control subsystems and domestic membrane technologies, with localization gradually increasing. Suppliers in South

Korea and Taiwan participate more actively in semiconductor UPW systems and supporting components. The key competitive barriers are not conventional manufacturing scale, but long-term qualification records, contamination control capability, ultra-low dissolved gas performance, process stability, customer installation references, and long-term field-support capabilities. New entrants are therefore more likely to gain initial market share through qualified degassing modules or critical subsystems rather than by directly replacing mature complete POU water treatment platforms.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “ArF Immersion Lithography Ultrapure Water Degassing System Industry Forecast” looks at past sales and reviews total world ArF Immersion Lithography Ultrapure Water Degassing System sales in 2025, providing a comprehensive analysis by region and market sector of projected ArF Immersion Lithography Ultrapure Water Degassing System sales for 2026 through 2032. With ArF Immersion Lithography Ultrapure Water Degassing System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world ArF Immersion Lithography Ultrapure Water Degassing System industry.

This Insight Report provides a comprehensive analysis of the global ArF Immersion Lithography Ultrapure Water Degassing System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ArF Immersion Lithography Ultrapure Water Degassing System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global ArF Immersion Lithography Ultrapure Water Degassing System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ArF Immersion Lithography Ultrapure Water Degassing System and breaks down the forecast by Degassing Technology, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ArF Immersion Lithography Ultrapure Water Degassing System.

This report presents a comprehensive overview, market shares, and growth opportunities of ArF Immersion Lithography Ultrapure Water Degassing System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Degassing Technology:

Membrane Contactor Degassing

Direct Vacuum Degassing

Hybrid Degassing

Others

Segmentation by Membrane Material:

Polypropylene

Polymethylpentene

Fluoropolymer

Others

Segmentation by Dissolved Oxygen Control Level:

Ultra Low DO ≤1 ppb

Low DO >1–10 ppb

Standard DO >10 ppb

Others

Segmentation by Application:

Logic

DRAM

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Xylem Inc.

Entegris, Inc.

Nomura Micro Science Co., Ltd.

Zhejiang CHEER Technology Co., Ltd.

Thermo Fisher Scientific Inc.

DIC Corporation

Henkel AG & Co. KGaA

Wacker Chemie AG

Elkem ASA

CHT Germany GmbH

WEVO CHEMIE GmbH

Key Questions Addressed in this Report

What is the 10-year outlook for the global ArF Immersion Lithography Ultrapure Water Degassing System market?

What factors are driving ArF Immersion Lithography Ultrapure Water Degassing System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ArF Immersion Lithography Ultrapure Water Degassing System market opportunities vary by end market size?

How does ArF Immersion Lithography Ultrapure Water Degassing System break out by Degassing Technology, by Application?

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