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Global Maskless Lithography Market Growth 2026-2032

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Abstracts

The global Maskless Lithography market size is predicted to grow from US$ 693 million in 2025 to US$ 2739 million in 2032; it is expected to grow at a CAGR of 19.9% from 2026 to 2032.

Maskless Lithography refers to lithography and direct-write technologies that transfer digital layout data, CAD/GDS patterns, or computer-controlled images directly onto photoresist, polymers, functional materials, wafers, glass, packaging substrates, or other micro/nanofabrication substrates without using a physical photomask or reticle. Instead of mask-based projection, these technologies use electron beams, laser beams, digitally modulated optical fields, or focused ion beams to expose, write, polymerize, etch, implant, deposit, or modify patterns directly. Compared with conventional mask lithography, the key value of maskless lithography lies in eliminating mask fabrication, shortening design-verification-fabrication cycles, reducing the cost of low-volume/high-mix development, and enabling non-standard substrates, dynamic distortion correction, local pattern modification, and three-dimensional micro/nanostructuring. Heidelberg Instruments describes direct writing or maskless lithography as replacing the photomask with a computer-controlled laser that writes patterns directly onto the substrate, while EV Group positions LITHOSCALE as a maskless exposure lithography platform for applications requiring high flexibility and high product variation.

Maskless Lithography Equipment can be divided into four major product categories: Electron Beam Lithography (EBL), Direct Laser Writing (DLW), Digital Maskless Lithography, and FIB Lithography. EBL uses focused electron beams for high-resolution nanoscale patterning and can be segmented into Gaussian single-beam, variable shaped-beam, and parallel multi-beam/HBA systems. DLW uses laser direct exposure, grayscale exposure, or two-photon/multi-photon polymerization for 2D, 2.5D, and 3D

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micro/nanofabrication, including photoresist laser direct writing, grayscale laser lithography, and two-photon/multi-photon 3D laser lithography. Digital Maskless Lithography uses DMD, SLM, GLV, or multi-head digital projection architectures for 2D or quasi-2D maskless exposure. FIB Lithography uses focused ion beams for direct milling, implantation, deposition, material modification, and nanopatterning. Heidelberg MLA 150 uses a DMD-based dynamic mask architecture, Nikon DSP-100 uses an SLM to directly project circuit patterns, SCREEN DW-3100 uses GLV imaging heads, and JEOL's EBL systems cover direct-write lithography, NIL, photonic crystals, and sub-10 nm linewidth R&D.

The applications of maskless lithography can be grouped into five major segments: wafer applications, micro-optics/photonics/metasurfaces, MEMS/sensors/microfluidics/biomedical, advanced packaging and large-area digital exposure, and general R&D/education/other. EBL is primarily used for semiconductor nanodevices, compound semiconductors, quantum devices, photonics, NIL masters, and advanced research. DLW is used for micro-optics, grayscale microstructures, two-photon 3D microstructures, microfluidics, life-science devices, and rapid prototyping. Digital Maskless Lithography is evolving from R&D maskless aligners toward production-oriented exposure for advanced packaging, IC substrates, MEMS, biomedical devices, and large-area substrates. FIB Lithography is used for nanoprototyping, local ion implantation, plasmonics, quantum defects, nanopores, and special-material processing. JEOL indicates that spot-beam EBL applications include DFB lasers, photonic crystals, metamaterials, optical waveguides, microlens arrays, MEMS, NIL molds, two-dimensional materials, and quantum devices; Nanoscribe's two-photon platforms support life-science, microfluidic, and 3D microstructure applications; and TESCAN's nanoprototyping platform integrates FIB milling, deposition, ion implantation, and electron beam lithography.

EBL accounted for approximately 43.61% of global Maskless Lithography Equipment revenue in 2025, Digital Maskless Lithography for 33.13%, DLW for 18.34%, and FIB Lithography for 4.93%. By 2032, Digital Maskless Lithography is expected to rise to 43.13% and overtake EBL as the largest segment. Key global suppliers in 2025 include Raith, Heidelberg Instruments, SCREEN Holdings, EV Group, JEOL, Vistec Electron Beam, Nanoscribe, UpNano, CETC 48, TESCAN, and Circuit Fabology Microelectronics Equipment. By segment, EBL is led by Raith, JEOL, Vistec, STS-Elionix, Crestec, and emerging Chinese suppliers; DLW is led mainly by Heidelberg Instruments, Raith, Nanoscribe, and UpNano; Digital Maskless Lithography involves SCREEN, EV Group, Heidelberg Instruments, NanoSystem Solutions, Nikon, Ushio, ADTEC, and Circuit Fabology; and FIB Lithography is concentrated around Raith and TESCAN. The product

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strategies of EVG, Nikon, and SCREEN in advanced-packaging digital lithography indicate that Digital Maskless Lithography is moving from laboratory equipment toward production-oriented advanced packaging platforms.

The growth logic of maskless lithography is shifting from research-oriented rapid prototyping toward flexible process platforms for advanced packaging, silicon photonics, quantum devices, MEMS, biomedical devices, and high-end micro/nanomanufacturing. Structurally, EBL will remain essential for high-resolution nanofabrication and advanced research, but its revenue share is expected to decline from 55.67% in 2021 to 37.49% in 2032. Digital Maskless Lithography, driven by AI/HPC-related HBM, chiplets, FOWLP, PLP, RDL, and large packaging substrates, is expected to increase from 21.33% in 2021 to 43.13% in 2032. DLW will maintain a stable 16%–18% revenue share, supported by micro-optics, optical communications, AR/VR, metasurfaces, microfluidics, and two-photon 3D microfabrication. FIB Lithography will remain a small but irreplaceable niche for nanoprototyping and special-material processing. Technologically, systems will evolve toward higher throughput, higher resolution, larger substrate formats, multi-beam or multi-head parallelism, real-time data processing, AI/algorithmic correction, combined 3D/grayscale processing, and production-line integration. Nikon DSP-100 emphasizes maskless technology, 600 mm square substrates, 1.0 ?m L/S resolution, and substrate warpage/deformation correction, while EVG LITHOSCALE emphasizes real-time data transfer, immediate exposure, high resolution, and throughput scalability.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Maskless Lithography 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 Maskless Lithography portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Maskless Lithography market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Maskless Lithography and breaks down the forecast by Product Type, 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 Maskless Lithography.

This report presents a comprehensive overview, market shares, and growth opportunities of Maskless Lithography market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Type:

Electron Beam Lithography (EBL)

Direct Laser Writing (DLW)

Digital Maskless Lithography

FIB Lithography

Segmentation by Technology:

Gaussian Single-beam EBL

Variable Shaped-Beam EBL

Parallel Multi-beam/HBA EBL

Photoresist Laser Direct Writing (LDW)

Grayscale Laser Lithography

Two-Photon/Multi-Photon 3D Laser Lithography

DMD/SLM Lithography

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SLM/GLV Lithography

Digital Lithography

Focused Ion Beam Direct Writing

Segmentation by Substrate Format:

Round Wafer Substrates

Square/Rectangular Packaging Substrates

Glass & Large-area Specialty Substrates

Polymer/Photoresist/Resin 3D Structures

Non-standard, Warped or Non-planar Substrates

Segmentation by Application:

Wafer Applications

Micro-optics, Photonics & Metasurfaces

MEMS, Sensors, Microfluidics & Biomedical

Advanced Packaging & Large-area Digital Exposure

General R&D, Education & Other

This report also splits the market by region:

Americas

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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

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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.

Raith

Heidelberg Instruments

SCREEN Holdings

EV Group

JEOL

Vistec Electron Beam GmbH

Nanoscribe GmbH & Co

UpNano GmbH

Nikon

TESCAN

Circuit Fabology Microelectronics Equipment

Multibeam Corporation

STS-Elionix

Crestec Corporation

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NanoSystem Solutions, Inc.

Ushio Inc.

ADTEC Engineering

ZEPTOOLS

Moji-Nano Technology

NanoBeam Limited

Jiangsu Ysphotech Integrated Circuit Equipment

SVG Optronics

miDALIX

Durham Magneto Optics

Microlight3D

Kloe

Beijing Goldenscope Technology

Zhejiang Xizhi Technology

SecureFoundry

CETC 48

Key Questions Addressed in this Report

What is the 10-year outlook for the global Maskless Lithography market?

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What factors are driving Maskless Lithography market growth, globally and by region?

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

How do Maskless Lithography market opportunities vary by end market size?

How does Maskless Lithography break out by Product Type, by Application?

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