

Global Resist Processing Systems Market Growth 2026-2032

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Abstracts

The global Resist Processing Systems market size is predicted to grow from US\$ 4496 million in 2025 to US\$ 7138 million in 2032; it is expected to grow at a CAGR of 7.0% from 2026 to 2032.

Resist Processing Systems typically refer to integrated coat/develop “track” tools (coater/developer, wafer track) deployed next to a stepper/scanner inside a lithography cell to execute the sequential resist-processing flow that enables pattern transfer. In practical scope, a resist track integrates modular functions such as spin/spray coating, edge-bead removal (EBR), bake and thermal conditioning (soft bake / PEB / chill), developing (puddle/spray), rinse/dry, buffering and robotic wafer handling, with FOUP/load-port interfaces and alignment/transfer modules to match scanner takt time. Tokyo Electron’s annual report describes the coater/developer as the system that coats and develops wafers with photoresist, operating together with the exposure tool in the lithography process. In addition to wafer tracks, some suppliers also offer photomask resist processing platforms (mask coater/developer + PEB, etc.) for advanced mask manufacturing requirements.

In terms of product types / process forms and core technologies, the mainstream in high-volume manufacturing is the 300mm multi-module, high-throughput track platform, evolving along two axes: advanced-node readiness and broader materials/applications readiness. TEL positions its CLEAN TRACK™ LITHIUS™ series around extensibility to advanced processes, high throughput, footprint efficiency, higher OEE and lower cost of ownership, and in 2025 highlighted defect-control and productivity improvements in its latest LITHIUS Pro DICE™. SCREEN’s DT-3000 (SOKUDO DUO) emphasizes dual, parallel process lines to raise throughput and improve handling reliability, and explicitly supports advanced immersion ArF as well as e-beam and DSA coat/develop/bake

solutions. Track platforms are also expanding to wider material sets (PI, BARC, SOC/SOD, spin-on hard mask, etc.) and to mixed 200/300mm and advanced packaging workflows; Kingsemi states its KS-FT200/300 covers i-line/KrF/ArF plus multiple materials and supports stand-alone or in-line operation with mainstream scanners. For 200mm and R&D/pilot use, EVG and SUSS highlight modular resist processing (spin/spray coat, develop, bake/chill) and versatility for advanced back-end / packaging applications.

Across applications, value chain, and industry dynamics, resist processing systems are indispensable for logic, memory, and specialty processes, and are increasingly extended to advanced packaging and specialty coatings. Upstream inputs span resist/developer/solvent chemistries and filtration, precision fluid metering/dispense, thermal subsystems (hot/chill plates), precision motion and handling (robots, servos, encoders), clean micro-environments and exhaust, sensors/metrology and data infrastructure, and control software. Midstream suppliers include the leading HVM platforms (TEL and SCREEN) alongside emerging alternative suppliers (e.g., SEMES' public statements on mass-producing an ArF-i photo-processing track tool, and China's expanding domestic track offerings). Downstream integration is tightly coupled to scanners and fab automation (takt time and OEE co-optimization). Key trends/drivers are: (i) tighter defect and thermal stability requirements for EUV/High-NA and increased litho process steps, (ii) OEE and uptime pressure as scanner time becomes more valuable (favoring high-throughput, low-downtime architectures such as dual-line tracks), (iii) advanced packaging and new materials broadening process windows and substrate versatility needs, and (iv) supply-chain resilience/localization pushing second-source adoption and domestic capability build-out.

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

This Insight Report provides a comprehensive analysis of the global Resist Processing Systems 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 Resist Processing Systems portfolios and capabilities, market entry strategies, market

positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Resist Processing Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Resist Processing Systems and breaks down the forecast by Process, by Wafer Size, 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 Resist Processing Systems.

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

Segmentation by Process:

Front-end Track (Coater & Developer)

Back-end Track (Coater & Developer)

Segmentation by Application:

Foundry and Logic Equipment

NAND Equipment

DRAM Equipment

Others

Segmentation by Wafer Size:

300mm Track (Coater & Developer)

200mm Track (Coater & Developer)

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Resist Processing Systems market?

What factors are driving Resist Processing Systems market growth, globally and by region?

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

How do Resist Processing Systems market opportunities vary by end market size?

How does Resist Processing Systems break out by Process, by Wafer Size?

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