

# Global Semiconductor Patterning Equipment Market Growth 2026-2032

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## Abstracts

The global Semiconductor Patterning Equipment market size is predicted to grow from US\$ 28822 million in 2025 to US\$ 45846 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Semiconductor Patterning Equipment and breaks down the forecast by Type, 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 Semiconductor Patterning Equipment.

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

#### Segmentation by Type:

Semiconductor Steppers and Scanners

Mask Writer

Resist Processing Equipment

Others

#### Segmentation by Application:

Foundry and Logic Equipment

NAND Equipment

DRAM Equipment

Others

### Segmentation by Process:

IC Patterning Equipment

Advanced Packaging Patterning Equipment

### Segmentation by Wafer Size:

300mm Patterning Equipment

200mm Patterning Equipment

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.

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

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Semiconductor Patterning Equipment market?

What factors are driving Semiconductor Patterning Equipment market growth, globally and by region?

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

How do Semiconductor Patterning Equipment market opportunities vary by end market size?

How does Semiconductor Patterning Equipment break out by Type, by Wafer Size?

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