

Global Photolithography Equipment Market, By Type (DUV (ArFi, KrF, ArF and I-line), EUV), By Wavelength (170nm-270nm, 1nm-170nm, 270nm-370nm), By Device Wavelength (Excimer Lasers, Laser Produced Plasma, Mercury Lamps), By End-Use (IDMs, Foundries), By Application (Back End, Front End), By Region, Competition Forecast & Opportunities, 2026

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Abstracts

Global photolithography equipment market is expected to reach USD28,973.50 million by 2026, growing at a CAGR of 10.75% owing to the rapid technological advancements and increasing demand from the semiconductor industry. The increasing adoption of digital transformation across sectors, rising demand for smart appliances, burgeoning advancements in automotive and innovations across the semiconductor industry is providing impetus to photolithography equipment growth across the globe. With the onset of advances in semiconductor manufacturing technologies, the companies are focusing on increasing precision and production capacity while decreasing overall manufacturing and overhead costs for semiconductor manufacturers. One such innovation is led by ASML, a Netherlands based photolithography equipment manufacturer which launched EUV photolithography equipment and revolutionized the way chips are manufactured. It has an ability to manufacture the chips at smaller scales which are cost-efficient, powerful, and faster than their counterparts.

The global photolithography equipment market can be segmented based on the type, wavelength, device wavelength, end-use, application, region and company. Based on type, the market can be segmented into EUV and DUV (ArFi, KrF, ArF and I-Line). EUV segment is anticipated to exhibit the fastest growth in the market, owing to its increasing demand from the semiconductor industry as EUV chips are the most preferred due to

their precision.

Based on wavelength, photolithography equipment can be divided into 1nm-170nm, 170nm-270nm, and 270nm-370nm. The 1nm–170nm segment of the global photolithography equipment market is projected to grow at the highest CAGR during the forecast period. This wavelength is used to produce negative AND (NAND) logic gates and dynamic random-access memory (DRAM). It allows semiconductor manufacturers to produce memory chips at low costs. Among different types of photolithography equipment used, EUV majorly uses this wavelength to manufacture semiconductor devices.

Based on device wavelength, the global photolithography equipment market has been classified into laser-produced plasmas, mercury lamps and excimer lasers. The burgeoning EUV photolithography equipment sales is driving the demand for laser-produced plasma light sources as they offer highly improved wavelengths of up to 1 nm.

ASML Holding NV, Canon, Inc., Nikon Corp., EV Group, Global Foundries, Inc., and Eulitha AG are some of the leading players operating in the global photolithography equipment market. The global photolithography equipment market is consolidated with ASML taking a center stage, contributing to the highest share of 76.07% in the market with its major customers being Samsung, Intel, and TSMC. ASML has been the key market player for the past 10 years and is expected to lead the market in the future as well on account of its high reliability and importer satisfaction. ASML holds monopoly in EUV segment, marking 100% share. Owing to complete monopoly and increasing innovations such as production capacity enhancement (20% increase) and precision enhancement (30% more precise models in 2020) in EUV machines by ASML, the company has increased prices for EUV machines significantly, which are also augmented by US China trade face-off. It led to cancelling several orders from ASML to China, hence the losses incurred were offset by increasing the prices of machines sold in other countries.

As the U.S. has put EUV machines on US trade control list, China has started its own R&D for these machines, but it is unlikely that these machines will be out there in the market in next 4-5 years. For the first half of 2021, ASML sold 16 EUV machines across the globe, with the price point of USD180 million per machine.

Years considered for this report:

Historical Years: 2016-2019

Base Year: 2020

Estimated Year: 2021E

Forecast Period: 2022F-2026F

Objective of the Study:

To analyze the historical growth in the market size of the global photolithography equipment market from 2016 to 2020.

To estimate and forecast the market size of the global photolithography equipment market from 2021 to 2026 and growth rate until 2026.

To define, classify and forecast the global photolithography equipment market based on type, wavelength, device wavelength, end-use, application, region, and company.

To scrutinize the detailed market segmentation and forecast the market size, in terms of value, and based on end-use sector by segmenting global photolithography equipment market into two sectors, namely, Front-End and Back-End.

To analyze and forecast the market size, in terms of regions.

To identify the drivers and challenges for the global photolithography equipment market.

To strategically profile leading players in the market which are driving the innovation and technological advancements in the global photolithography equipment market.

TechSci Research performed both primary as well as exhaustive secondary research for this study. Initially, TechSci Research sourced a list of photolithography equipment manufacturers across the globe. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents

were also enquired about their competitors. Through this technique, TechSci Research was able to include the manufacturers which could not be identified due to the limitations of secondary research. TechSci Research analyzed the product offerings, and presence of all major developers across the globe.

TechSci Research calculated the global photolithography equipment market size using a top-down approach, where data for various applications across various end-use segments was recorded and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated through analyzing historical data of these product types and applications for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

Photolithography equipment technology solution providers

End-Users of global photolithography equipment market (Front-End and Back-End)

Associations, organizations, forums, and alliances associated with the global photolithography equipment market, semiconductor manufacturers

Government bodies such as regulating authorities and policy makers

Research & development organizations and consulting firms

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as manufacturers, suppliers, and End-Uses. The study would also help them in identifying which market segments should be targeted over the coming years to strategize investments and capitalize on growth of the market.

Report Scope:

In this report, the global photolithography equipment market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Photolithography Equipment Market, By Type:

DUV (ArFi, KrF, ArF, I-line)

EUV

Global Photolithography Equipment Market, By Wavelength:

170nm-270nm

1nm-170nm

270nm-370nm

Global Photolithography Equipment Market, By Device Wavelength:

Excimer Lasers

Laser Produced Plasma

Mercury Lamps

Global Photolithography Equipment Market, By End-Use:

IDMs

Foundries

Global Photolithography Equipment Market, By Application:

Back End

Front End

Global Photolithography Equipment Market, By Region:

Asia-Pacific

China

South Korea

Japan

Singapore

India

North America

United States

Mexico

Canada

Europe

Germany

France

United Kingdom

Italy

Spain

Middle East & Africa

UAE

South Africa

Saudi Arabia

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global photolithography equipment market.

Voice of Customer: Brand Awareness, Brand Satisfaction, and Price are the major factors affecting decision related to the global photolithography equipment market for various users, globally.

Available Customizations:

With the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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