

Photolithography Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2017-2027 By Type (EUV (Extreme Ultraviolet), DUV (Deep Ultraviolet)), By DUV Type (ArFi (Argon Fluoride Immersion, KrF (Krypton Fluoride), ArF (Argon Fluoride), I-Line)), By Wavelength (1nm-170nm, 170nm-270nm, 270nm-370nm), By Device Wavelength (Mercury Lamps, Fluorine Lamps, Excimer Lasers, Laser Produced Plasma), By End-Use (IDMs (Integrated Device Manufacturer), Foundries), By Application (Back-End, Front-End), By Region

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Abstracts

Global Photolithography Equipment Market stood at USD 15,904.02 million in 2021 and is forecast to register a CAGR of 16.70% by 2027. The demand for photolithography equipment is primarily driven by the high demand for smaller electronic devices, increasing internet of things penetration and the expansion of the semiconductor industry. Moreover, the factors such as high equipment maintenance and operational cost, and limitation for curved surfaces hinder the growth of Global Photolithography Equipment Market. In addition to this, lockdown during the covid pandemic impacted the overall supply chain and demand for photolithography devices.

A photolithography equipment uses light to imprint patterns on a substrate. By etching away material with minute details, this patterning can be used to make goods such as circuit boards or microchips. The semiconductor and microelectronics industries employ photolithography equipment to pattern thin sheets of material on a substrate. The

capability of photolithography equipment to fabricate incredibly tiny objects on a substrate is its main benefit. Furthermore, it is used to transfer a specific pattern from an image onto a substrate, creating a pattern that serves as a mask during an etching or diffusion process, to create semiconductor devices, thin-film circuits, optical devices, and printed circuits.

Emergence of Advanced Consumer Products in the Consumer Electronics Industry

Smart home devices, wearable health monitors, and entertainment devices are gaining popularity in the consumer electronics world. Consumers are expected to gravitate towards energy-efficient smart home products such as smart thermostats, light bulbs, and switches to save on high electricity bills. Therefore, the transition of electronic goods from fully automated systems toward the emergence of a smart home that interconnects all the household devices to create a single controlling unit will result in the high adoption of ICs and photolithography techniques. Manufacturers are encouraged to introduce better consumer products with improved functionalities due to the growing consumer demand for better electronics. Smart wearables, also known as wearable technology, include smartwatches, fitness trackers, and smart fabrics and require ICs using the photolithography technique, which is likely to augment the demand for photolithography equipment during the forecast period.

Rising Wafer Processing and Fabrication Capacities in Semiconductor Industry

Presently, the semiconductor industry is focused on increasing its production capacity due to the chip shortage witnessed globally. Key players in the industry are focusing on investment in the development of new fabrication processes and expansion of older facilities. Thus, rise in adoption and investments in fabrication technology are boosting the Global Photolithography Equipment Market. For instance, TSMC, which is Taiwan's leading pure play foundry, holds a prominent share in the global market and has spent 80% of its capital to extend capacities of advanced chip manufacturing technology companies and to invest in deep UV lithography. Hence, these factors are fueling the market growth.

Preference for Improvements in Chip Performance in Cloud & AI Application

The advancements in AI applications and the improvement of cloud performance are both possible with DUV type photolithography methods. In cloud and AI applications, better chip performance and lower power requirements are preferred. Additionally, as a result of the increased demand for DUV lithography systems, photomask producers are

being forced to speed up the production of the photomasks needed for complex multi-patterning DUV lithography operations. It has been discovered that DUV lithography systems have higher market prospects than EUV platforms. During the projected period, these developments are expected to support the expansion of the global photolithography equipment market.

The Increased Demand for Miniaturized Electronic Equipment

Miniaturized electronic equipment are gaining popularity in the semiconductor industry with the increase in demand for high-performance electronics. In addition, the rising demand for innovative consumer electronics drives the need for flexible and compact integrated circuits. In addition, the growth of technologies such as RFID, MEMS devices, and other power devices increases the demand for thin wafers. This is because thin wafers reduce package thickness, particularly for smartphones, handheld gadgets, and compact electronic items. These developing applications that employ extremely thin and ultrathin die generate substantial demand for tiny electronic devices and contribute toward expanding the global photolithography equipment market.

Increasing Investments in Research and Development

Artificial intelligence and machine learning are two examples of ground-breaking technologies made possible in recent years by the semiconductor industry. Moreover, even more sophisticated devices with more powerful processing and memory capabilities will be needed to advance the digital revolution. In addition, semiconductor businesses have become more interested in establishing end-to-end design and manufacturing capabilities for cutting-edge technology as a result of the COVID-19 crisis disrupting supply chains and rising geopolitical tensions. Many governments are working to promote their regional semiconductor sector since they share this interest, which is probably going to have an impact on the global photolithography equipment market. For instance, to concentrate on regional clusters, South Korea introduced the K-Belt semiconductor strategy. The plan comprises lenient rules, improved infrastructure, long-term financing of USD 886 million, significant tax credits of up to 50% for research and development and 16% for manufacturing. Therefore, the expansion of the global photolithography equipment market during the projected period is likely to be fuelled by expanding R&D activities as well as the semiconductor industry.

Market Segmentation

Global Photolithography Equipment Market is segmented on the basis of type, DUV

type, wavelength, device wavelength, end-use, application, region and competitive landscape. By Type, the market is segmented into EUV (Extreme Ultraviolet) and DUV (Deep Ultraviolet). By DUV Type, the market is segmented into ArFi (Argon Fluoride Immersion), KrF (Krypton Fluoride), ArF (Argon Fluoride) and I-Line. By wavelength, the market is segmented into 1nm-170nm, 170nm-270nm and 270nm-370nm. By device wavelength, the market is segmented into mercury lamps, fluorine lamps, excimer lasers and laser produced plasma. By end-use, the market is segmented into IDMs (Integrated Device Manufacturer) and foundries. By application, the market is segmented into back-end and front-end. By region, the market is segmented into Asia-Pacific, North America, Europe, South America, Middle East and Africa.

Company Profiles

ASML Holding N.V., Canon Inc., EV Group (EVG), GlobalFoundries Inc., Nikon Corporation, Veeco Instruments Inc., SUSS MicroTec SE, Taiwan Semiconductor Manufacturing Company Limited, Eulitha AG, NuFlare Technology Inc. are among the major market players in the Global Photolithography Equipment Market.

Report Scope:

In this report, Global Photolithography Equipment Market has been segmented into the following categories in addition to the industry trends which have also been listed below:

Photolithography Equipment Market, By Type:

DUV (Deep Ultraviolet)

EUV (Extreme Ultraviolet)

Photolithography Equipment Market, By DUV Type:

ArFi (Argon Fluoride Immersion)

KrF (Krypton Fluoride)

ArF (Argon Fluoride)

I-line

Photolithography Equipment Market, By Wavelength:

170nm - 270nm

1nm - 170nm

270nm - 370nm

Photolithography Equipment Market, By Device Wavelength:

Excimer Lasers

Laser Produced Plasma

Fluorine Lamps

Mercury Lamps

Photolithography Equipment Market, By End-Use:

IDMs (Integrated Device Manufacturer)

Foundries

Photolithography Equipment Market, By Application:

Back-End

Front-End

Photolithography Equipment Market, By Region:

Asia-Pacific

China

South Korea

Japan

Singapore

India

Rest of Asia Pacific

North America

United States

Canada

Mexico

Europe

Netherlands

Germany

France

United Kingdom

Italy

Spain

Rest of Europe

South America

Brazil

Argentina

Colombia

Rest of South America

Middle East and Africa

Israel

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Photolithography Equipment Market.

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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