

Extreme Ultraviolet (EUV) Lithography Market by Component (Light Sources, Optics, Masks), System Type (0.33 NA EUV System (NXE), 0.55 NA EUV System (EXE)), Integrated Device Manufacturers, Foundries, Logic Chips, Memory Chips - Global Forecast to 2032

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Report description:

The global extreme ultraviolet (EUV) lithography market is expected to grow from USD 15.84 billion in 2026 to USD 30.36 billion by 2032, at a CAGR of 11.4%. The rapid advancements in consumer electronics, including smartphones, wearables, tablets, and gaming devices, are driving sustained demand for advanced semiconductor chips that offer higher performance, compact designs, and improved energy efficiency. To support faster processing, enhanced graphics, and longer battery life, manufacturers increasingly rely on EUV lithography to enable smaller transistors and higher transistor density. The shift toward next-generation technologies, including foldable displays, augmented reality, and virtual reality, is further increasing chip complexity and reinforcing the need for high-precision EUV-based manufacturing. As performance and miniaturization requirements continue to rise across consumer electronics and autonomous applications, EUV lithography is becoming a critical enabler for producing reliable, high-performance integrated circuits at advanced nodes.

<https://mnmimg.marketsandmarkets.com/Images/extreme-ultraviolet-lithography-market-img-overview.webp>

"Light sources to exhibit highest CAGR from 2026 to 2032."

Light sources are expected to witness the highest CAGR in the extreme ultraviolet (EUV) lithography market due to their direct impact on system productivity, throughput, and cost efficiency at advanced semiconductor nodes. Continuous demand for higher wafer throughput is driving the need for increased EUV source power, improved stability, and longer uptime, prompting frequent upgrades and replacements of existing light source modules. In addition, the transition toward more advanced process nodes and

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the gradual shift to next-generation EUV platforms are increasing performance requirements for light sources, accelerating R&D investments and adoption. The high technical complexity, limited supplier base, and strong focus on productivity-driven enhancements further support faster revenue growth for this component compared to other EUV system elements.

"Logic chips held largest share of extreme ultraviolet (EUV) lithography market in 2025."

Logic chips held the largest market share in the application segment of the extreme ultraviolet (EUV) lithography market in 2025, driven by early and widespread adoption of EUV at advanced process nodes. Leading-edge logic devices at 7 nm, 5 nm, and 3 nm require extremely fine patterning, tight overlay control, and high transistor density, all of which are more efficiently achieved using EUV compared with multi-patterning DUV techniques. The rapid growth of applications such as artificial intelligence, high-performance computing, data centers, and advanced automotive electronics is driving strong demand for high-performance logic chips, accelerating EUV tool utilization and capacity expansion. In contrast, memory manufacturers have adopted EUV more selectively, focusing on specific layers, which further reinforces the dominance of logic chips in overall extreme ultraviolet (EUV) lithography demand.

"Asia Pacific to be fastest-growing regional market for EUV lithography from 2026 to 2032."

Asia Pacific is expected to register the highest CAGR during the forecast period, driven by its strong concentration of leading semiconductor foundries and integrated device manufacturers (IDMs), as well as continuous investments in advanced-node manufacturing. The region's dominance is supported by large-scale capacity expansions at 5 nm, 3 nm, and sub-3 nm nodes, rising demand for logic chips used in AI, high-performance computing, and advanced consumer electronics, and a mature semiconductor supply chain that enables rapid EUV adoption. In addition, sustained capital expenditure, aggressive technology roadmaps, and government-backed initiatives to strengthen domestic semiconductor capabilities are accelerating EUV tool installations. These factors collectively position Asia Pacific as the primary demand center and growth engine for the global extreme ultraviolet (EUV) lithography market.

Breakdown of Primaries

Various executives from key organizations operating in the extreme ultraviolet (EUV) lithography market were interviewed in-depth, including CEOs, marketing directors, and innovation and technology directors.□

-□By Company Type: Tier 1-30%, Tier 2-50%, and Tier 3-20%

-□By Designation: C-level Executives-25%, Directors-35%, and Others-40%

-□By Region: Asia Pacific-40%, Americas-25%, and EMEA- 35%

The extreme ultraviolet (EUV) lithography market is dominated by ASML (Netherlands) as the sole manufacturer of EUV lithography products, as well as by component manufacturers such as TRUMPF (Germany), Ushio Inc. (Japan), Energetiq (US), Zeiss Group (Germany), NTT Advanced Technology Corporation (Japan), Rigaku Holdings Corporation (Japan), Edmund Optics Inc. (US), AGC Inc. (Japan), Tekscend Photomask (Japan), Lasertec Corporation (Japan), HOYA Corporation (Japan), NuFlare Technology, Inc. (Japan), KLA Corporation (US), ADVANTEST CORPORATION (Japan), SUSS MicroTec SE (Germany), Applied Materials, Inc. (US), Park Systems (South Korea), Imagine Optic (France), MKS Inc. (US), Taiwan Semiconductor Manufacturing Company Limited (TSMC) (Taiwan), Intel Corporation (US), Samsung (South Korea), SK HYNIX INC. (South Korea), and Micron Technology (US). The study includes an in-depth competitive analysis of these key players in the extreme ultraviolet (EUV) lithography market, with their company profiles, recent developments, and key market strategies.

Study Coverage

The report segments the extreme ultraviolet (EUV) lithography market and forecasts its components, system types, end users, applications, and regions. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It provides a detailed view of the market across three main regions-Americas, Asia Pacific, and EMEA. The report includes a value chain analysis of the key players and their competitive analysis of the EUV lithography ecosystem.

Key Benefits of Buying the Report

-□Analysis of key drivers (surging deployment of EUV lithography across leading-edge foundry nodes), restraints (high upfront

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capital investment), opportunities (increasing investments in advanced EUV lithography and semiconductor devices), and challenges (competition from alternative lithography techniques) influencing the growth of the extreme ultraviolet (EUV) lithography market

-□Products/Solution/Service Development/Innovation: Detailed insights into upcoming components, technologies, research, and development activities in the extreme ultraviolet (EUV) lithography market

-□Market Development: Comprehensive information about lucrative markets-the report analyzes the extreme ultraviolet (EUV) lithography market across varied regions

-□Market Diversification: Exhaustive information about new EUV lithography in untapped geographies, recent developments, and investments in the extreme ultraviolet (EUV) lithography market

-□Competitive Assessment: In-depth assessment of market shares and growth strategies, and offerings of leading players offering components of EUV lithography, such as KLA Corporation (US), ZEISS Group (Germany), TRUMPF (Germany), AGC Inc. (Japan), and Lasertec Corporation (Japan)

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