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EBEAM INITIATIVE SURVEY OF SEMICONDUCTOR LUMINARIES PREDICTS CONTINUED GROWTH IN PHOTOMASK MARKET THIS YEAR

eBeam Initiative welcomes AGC as its newest member

SAN JOSE, Calif., September 23, 2025—The eBeam Initiative, a forum dedicated to the education and promotion of new semiconductor manufacturing approaches based on electron beam (eBeam) technologies, today announced the completion of its 14th annual eBeam Initiative Luminaries survey. Industry luminaries representing 51 companies from across the semiconductor ecosystem—including photomasks, electronic design automation (EDA), chip design, equipment, materials, manufacturing and research—participated in this year’s survey. The eBeam Initiative also announced that AGC has joined as its newest member.

Key Survey Takeaways

64 percent of the luminaries who responded to the survey predict that mask revenues in 2025 will increase compared to 2024, a sentiment that aligns with SEMI’s forecast of 5 percent year-over-year growth for 2025(1). In a new survey question, mask writing was ranked as the top priority for investment at the leading edge for 2026, followed closely by mask inspection and repair, and optical proximity correction (OPC)/inverse lithography technology (ILT). In a related question, 88 percent of luminaries who responded predict that multi-beam mask writer purchases will increase over the next three years.

EUV lithography and curvilinear masks are two significant technology trends impacting the photomask market. High-NA EUV lithography is targeted for the most advanced nodes and is under development. In a question about high-NA EUV’s impact on mask makers, 40 percent of luminaries now believe the minimum dimension of mask sub-resolution assist features (SRAFs) needed is 15nm or below, an increase from 29 percent last year. Turning to curvilinear masks, confidence continues to remain high for manufacturing curvilinear mask features, with 77 percent of respondents indicating that leading-edge mask shops can handle at least a limited number of curvilinear masks in high-volume manufacturing (HVM) by the end of next year.

The complete results of the Luminaries survey will be presented and discussed by an expert panel during a special eBeam Initiative event held this evening in conjunction with the SPIE Photomask Technology + EUV Lithography Conference in Monterey, Calif. Survey results will be available for download following the event at www.ebeam.org. AGC will also be recognized at the event as the newest member joining more than 50 companies in the eBeam Initiative.

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“We are extremely pleased to welcome AGC to the eBeam Initiative,” stated Aki Fujimura, CEO of D2S, the managing company sponsor of the eBeam Initiative. “The continued growth of the photomask market highlights how essential every part of the mask supply chain has become to the rest of semiconductor manufacturing. As a leading provider of photomask substrates, AGC brings a unique perspective that will help strengthen our collective efforts to raise awareness and foster collaboration across the industry.”

Reference

(1) Source: [Photomask Market Characterization Study](#), SEMI, August 8, 2025

About The eBeam Initiative

The eBeam Initiative provides a forum for educational and promotional activities regarding new semiconductor manufacturing approaches based on electron beam (eBeam) technologies. The goals of the Initiative are to reduce the barriers to adoption to enable more integrated circuit (IC) design starts and faster time-to-market while increasing the investment in eBeam technologies throughout the semiconductor ecosystem. Members, which span the semiconductor ecosystem, include: aBeam Technologies; Advantest; AGC; Alchip Technologies; AMD; AMTC; Applied Materials; Artwork Conversion; ASML; Averroes.ai; Cadence Design Systems; Canon; CEA-Leti; D2S; Dai Nippon Printing; EQUIcon Software GmbH Jena; ESOL; EUV Tech; Fractilia; Fraunhofer IPMS; FUJIFILM Corporation; Fujitsu Semiconductor Limited; GenlSys GmbH; GlobalFoundries (GF); Grenon Consulting; Hitachi High-Tech Corporation; HJL Lithography; HOLON CO., LTD; HOYA Corporation; IBM; imec; IMS CHIPS; IMS Nanofabrication AG; JEOL; KIOXIA; KLA; Micron Technology; Multibeam Corporation; NCS; NuFlare Technology; Petersen Advanced Lithography; Photronics; QY Mask; Samsung Electronics; Semiconductor Manufacturing International (Shanghai) Corporation (SMIC); Siemens EDA; STMicroelectronics; Synopsys; TASMIT; Tokyo Electron Ltd. (TEL); TOOL Corporation; Tekscend Photomask; UBC Microelectronics; Vistec Electron Beam GmbH and ZEISS. Membership is open to all companies and institutions throughout the electronics industry. To find out more, please visit www.ebeam.org.

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