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**eBeam Initiative Survey of Semiconductor Luminaries Predicts
a Bright Outlook for the Photomask Industry**

*Results of 15th annual Luminaries survey to be presented at live event held during
SPIE Photomask Technology + EUV Lithography Conference*

SAN JOSE, Calif., September 9, 2026—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 15th annual eBeam Initiative Luminaries survey. Industry luminaries representing more than 45 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, which was conducted in July 2026.

Key Survey Takeaways

In a new survey question, 66 percent of the luminaries who responded predict that the industry will adopt large-format masks (approximately 6 x 12-inch rectangular) within the next decade. The motivation for large-format masks is to improve High-NA (0.55 NA) EUV machine productivity (wafers per hour) by doubling the exposed field in one scan, thereby eliminating stitching and resulting in increased throughput for high-volume manufacturing (HVM). Separately, 94 percent of luminaries believe that mask revenues in 2026 will increase compared to 2025. In a related question, a majority of luminaries predict that mask equipment purchases will increase over the next three years for multi-beam writers (93 percent), inspection (92 percent), and etching (68 percent).

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.

“Photomask market growth looks extremely healthy over the next 15 years,” stated Aki Fujimura, CEO of D2S, the managing company sponsor of the eBeam Initiative. “We’re already seeing double-digit photomask growth in the AI era, according to SEMI, while International Business Strategies (IBS) forecasts chip design starts to grow at 14.4 percent CAGR from 2025 to 2030, fueling a second wave of growth for the photomask market. Beyond 2030, the adoption of large-format 12-inch masks is expected to drive a third wave of growth. The future of the photomask market gives our entire industry a lot to celebrate.”

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EUV Lithography and Curvilinear Masks Remain Focus of Survey

Adoption of actinic mask inspection for 0.33 NA EUV is expected to increase, with 64 percent of luminaries predicting that 61-100 percent of 0.33 NA EUV HVM production masks will be inspected in the mask shop using actinic inspection three years from now—an increase from 43 percent in last year's survey. In a repeat question about the impact of High-NA EUV on mask makers, 46 percent of luminaries now believe the minimum dimension needed for mask sub-resolution assist features (SRAFs) is 15nm or below, continuing a three-year upward trend from 40 percent last year and 29 percent the year before.

Turning to curvilinear masks, 87 percent of luminaries predict that most leading-edge mask shops will manufacture at least one layer with mostly curvilinear shapes within the next three years—an indication that curvilinear masks will be used beyond fixing hot spots. In addition, mask shop software infrastructure remains the top concern in producing curvilinear masks, while concerns about mask inspection and access to multi-beam mask writers have declined since the survey first asked this question five years ago.

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; TASMITEK; Tekscend Photomask; Tokyo Electron Ltd. (TEL); TOOL Corporation; 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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