

# Global CIS Probe Card Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on CIS Probe Card competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. A CIS (CMOS Image Sensor) Probe Card is a specialized test tool used to electrically test CMOS image sensors during the semiconductor manufacturing process. CMOS image sensors are widely used in cameras, mobile devices, automotive imaging, and other imaging applications. A probe card for CIS is specifically designed to interface with the electrical pads on the wafer to perform functional testing and quality assurance before the sensors are packaged and shipped. In 2024, global CIS Probe Card production reached approximately 13,238 K units, with an average global market price of around US\$ 21 per unit. The production capacity of CIS Probe Card is 17,651 K units per year, the average gross profit margin was 26-29%. The upstream of the CIS Probe Card supply chain mainly provides core raw materials and key components for its production, including special alloys, silicon, ceramic substrates, copper foil, and electronic components such as PCBs, which lay the foundation for ensuring the precision and conductivity of the probe card; it also covers professional manufacturing equipment like precision drilling machines and laser direct imaging systems that are essential for the production process. The midstream focuses on the R&D, precision assembly and testing of CIS Probe Cards, where manufacturers use processes such as electroplating, photolithography and etching to make probes, then assemble them with circuit boards and other components into finished products, while conducting strict performance tests to meet the customized testing needs of different chips. The downstream is closely connected to the semiconductor industry, mainly supplying to scenarios such as wafer manufacturing, chip design and various terminal product fields relying on CIS chips, including consumer electronics, automotive electronics, medical imaging and industrial

control, and these downstream fields will put forward higher requirements for the precision and stability of CIS Probe Cards with the continuous upgrading of chip processes, thereby reversing the drive for technological iteration in the midstream and upstream. The cost structure of CIS Probe Cards is dominated by upstream raw material costs, among which high-performance materials such as special alloy probes, ceramic substrates and high-precision copper foil account for a large proportion because the high precision and stability requirements of the product force the selection of high-quality raw materials with higher prices. The second largest cost comes from the manufacturing and process links, including the purchase and depreciation of expensive precision manufacturing equipment, as well as the high expense of processes such as photolithography, etching and precision grinding required for MEMS probe production, and the cost will further increase with the upgrading of processes for higher-density and smaller-pitch chip testing. In addition, there are R&D costs that cannot be ignored. Due to the need for continuous technological innovation to adapt to the shrinking of semiconductor process nodes, long-term investment in technology research and development and product customization design is required. Meanwhile, labor costs for professional technicians engaged in precision assembly and performance testing, as well as the additional costs of quality inspection to ensure product reliability, also account for a certain proportion of the overall cost.

The global CIS Probe Card market size was estimated at USD 278.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global CIS Probe Card market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global CIS Probe Card market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of

market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the CIS Probe Card market.

## **Global CIS Probe Card Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

FormFactor  
Technoprobe S.p.A.  
Micronics Japan (MJC)  
Japan Electronic Materials (JEM)  
MPI Corporation  
Korea Instrument  
Will Technology  
STAr Technologies, Inc.  
Shenzhen DGT  
Sinowin  
Nidec SV Probe  
Suzhou Maxone Semiconductor  
ZENFOCUS  
Hongyi Advanced Technology  
ProbeLeader  
MemsFlex

## **Market Segmentation (by Type)**

CIS Cantilever Probe Card  
CIS MEMS Probe Card  
Other

## **Market Segmentation (by Application)**

Consumer Electronics  
Automotive  
Medical Imaging  
Security and Surveillance

## **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

## **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the CIS Probe Card Market  
Overview of the regional outlook of the CIS Probe Card Market:

## Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the CIS Probe Card Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of CIS Probe Card, their output value,

profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major

players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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