

# Global HPC, AI and ASIC Industry Probe Cards Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global HPC, AI and ASIC Industry Probe Cards market size is expected to reach \$ 1777 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

HPC, AI and ASIC Probe Cards refer to high-end semiconductor probe cards used for wafer sort and final testing of chips targeting High-Performance Computing (HPC), Artificial Intelligence (AI), and Application-Specific Integrated Circuit (ASIC) applications. Price: High-end HPC/AI/ASIC probe cards range from \$8–15 per pin for international products and \$3–6 per pin for domestic Chinese solutions. Industry Chain: Upstream includes probe pins, substrates, PCB, and precision equipment; midstream covers design, assembly, and calibration; downstream serves wafer fabs and OSATs for wafer testing.

## Market Drivers

### Strong and Sustained Demand from AI, HPC and High-end ASIC Chips

The rapid expansion of cloud computing, large language models, autonomous driving, data centers, and high-speed networking has created an unprecedented surge in demand for high-performance chips, which directly drives the robust growth of the probe card market. AI accelerators, GPU, CPU, HBM, and custom ASICs for networking and industrial applications require massive-volume wafer testing before packaging. As chip manufacturers continue to expand production capacity for advanced nodes and advanced packaging processes, probe cards have become indispensable core testing components. Unlike traditional consumer electronics chips, HPC/AI/ASIC chips feature higher design complexity, larger die sizes, higher pin counts, and stricter performance

requirements, which means each chip project demands more customized, high-precision, and high-reliability probe card solutions. This continuous and high-value demand forms the most fundamental and powerful driver for the entire industry.

### Advanced Technology Evolution of Semiconductor Manufacturing

Continuous advancements in semiconductor process and packaging technology represent a critical long-term driver. With the migration to 3nm, 2nm and even more advanced nodes, chip I/O density increases sharply, pad sizes shrink, and pitch becomes finer, requiring probe cards to achieve ultra-high precision, ultra-low contact force, and excellent electrical performance. Meanwhile, the popularity of advanced packaging architectures such as 2.5D/3D stacking, Chiplet, CoWoS, and HBM further raises the technical threshold for probe cards. These high-end chips need to support ultra-high-speed signals, large current transmission, and strict signal integrity, forcing probe card suppliers to continuously invest in R&D in MEMS technology, vertical probe structures, high-performance materials, and high-frequency design. This technological iteration not only expands market space but also increases product added value, supporting the high prosperity of the high-end probe card market.

### Cost Efficiency and Yield Control Requirements in Chip Manufacturing

Wafer sort test using probe cards is one of the most critical steps to control chip manufacturing costs and improve overall yield. For HPC, AI and ASIC chips with high design and production costs, early detection of defective dies at the wafer stage can avoid the huge waste caused by packaging bad dies. The higher the value of the chip, the higher the economic value of effective screening through probe testing. In order to improve production efficiency and reduce the test cost per chip, chip makers and testing factories increasingly favor multi-DUT parallel test solutions, which require probe cards with higher uniformity, higher stability, and longer lifetime. This trend promotes the upgrade of probe card products from single-station to multi-station, from low-channel count to high-channel count, and from ordinary structure to high-performance MEMS structure, forming a strong market pull.

This report studies the global HPC, AI and ASIC Industry Probe Cards production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HPC, AI and ASIC Industry Probe Cards and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand

trends and competition, as well as details the characteristics of HPC, AI and ASIC Industry Probe Cards that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global HPC, AI and ASIC Industry Probe Cards total production and demand, 2021-2032, (K PIN)

Global HPC, AI and ASIC Industry Probe Cards total production value, 2021-2032, (USD Million)

Global HPC, AI and ASIC Industry Probe Cards production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K PIN), (based on production site)

Global HPC, AI and ASIC Industry Probe Cards consumption by region & country, CAGR, 2021-2032 & (K PIN)

U.S. VS China: HPC, AI and ASIC Industry Probe Cards domestic production, consumption, key domestic manufacturers and share

Global HPC, AI and ASIC Industry Probe Cards production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K PIN)

Global HPC, AI and ASIC Industry Probe Cards production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K PIN)

Global HPC, AI and ASIC Industry Probe Cards production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K PIN)

This report profiles key players in the global HPC, AI and ASIC Industry Probe Cards market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include FormFactor, Technoprobe S.p.A., Micronics Japan (MJC), Japan Electronic Materials (JEM), MPI Corporation, TSE, SV Probe, Korea Instrument, Will Technology, CHPT, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HPC, AI and ASIC Industry Probe Cards market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K PIN) and average price (US\$/PIN) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global HPC, AI and ASIC Industry Probe Cards Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HPC, AI and ASIC Industry Probe Cards Market, Segmentation by Type:

MEMS Probe Cards

Vertical Probe Cards (VPC)

Advanced Cantilever Probe Cards

## Global HPC, AI and ASIC Industry Probe Cards Market, Segmentation by Pin Count & Density:

Ultra-High-Density Probe Cards

High-Density Probe Cards

Medium-Density Probe Cards

## Global HPC, AI and ASIC Industry Probe Cards Market, Segmentation by Electrical Performance & Test Requirements:

High-Speed Signal Probe Cards

High-Current Power Probe Cards

Mixed-Signal ASIC Probe Cards

## Global HPC, AI and ASIC Industry Probe Cards Market, Segmentation by Application:

HPC

AI

ASIC

## Companies Profiled:

FormFactor

Technoprobe S.p.A.

Micronics Japan (MJC)

Japan Electronic Materials (JEM)

MPI Corporation

TSE

SV Probe

Korea Instrument

Will Technology

CHPT

Protec MEMS Technology

Feinmetall

Synergie Cad Probe

MaxOne

STAR Technologies, Inc.

Shenzhen DGT

Suzhou Silicon Test System

TIPS Messtechnik GmbH

### **Key Questions Answered:**

1. How big is the global HPC, AI and ASIC Industry Probe Cards market?
2. What is the demand of the global HPC, AI and ASIC Industry Probe Cards market?
3. What is the year over year growth of the global HPC, AI and ASIC Industry Probe Cards market?
4. What is the production and production value of the global HPC, AI and ASIC Industry Probe Cards market?
5. Who are the key producers in the global HPC, AI and ASIC Industry Probe Cards market?
6. What are the growth factors driving the market demand?

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