

# Global Probe Card Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Probe Card market size is expected to reach \$ 5368 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Semiconductor probe cards serve as the core interface consumables connecting test equipment to wafers during chip-on-wafer (COW) testing. By contacting the chip's solder pads/bumps via probes, they enable electrical signal transmission and functional/parameter testing. This process screens out defective products before packaging, reducing costs and ensuring yield rates.

Global probe card sales in 2024 reached 235,421 thousand pins, with an average selling price of \$13.63 per pin.

Upstream Influences (Materials and Equipment)

Core Materials: Probes (Tungsten / Rhenium-Tungsten / Beryllium Copper), Ceramic Substrates (Alumina / Aluminum Nitride), PCB, PI Film, Gold Wire / Copper Wire.

Price fluctuations directly impact costs (probes account for approximately 50%).

Domestic material substitution (e.g., beryllium copper alloys, ceramic substrates) reduces import dependency and enhances bargaining power.

Critical Equipment: MEMS microfabrication equipment (DRIE, lithography), probe test systems, automatic probe placement machines.

Equipment precision determines probe card performance (e.g., sub-micron processing

required for pitch  $\leq 20\mu\text{m}$ ).

## Downstream Impact (Semiconductor Manufacturing & Testing)

### Wafer Manufacturing:

Probe card yield directly impacts chip test pass rates, thereby affecting overall yield and costs (testing accounts for ~15%-20% of manufacturing costs).

Advanced processes ( $\leq 5\text{nm}$ ) and 3D packaging drive MEMS probe card demand, while technological iteration compels test upgrades.

### Test Equipment:

Probe cards and test systems/probing stations require co-design (e.g., interfaces, load matching, frequency matching).

High-frequency and high-density testing require test systems supporting multi-channel operation and low latency (

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