

Global Semiconductor Back-End Test Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Back-End Test Equipment market size is expected to reach \$ 20145 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

Semiconductor equipment is mainly divided into front-end equipment and back-end packaging and testing equipment. Front-end equipment is mainly wafer manufacturing equipment, while back-end packaging and testing equipment includes testers (ATE), handlers, probe stations, thinning machines, dicing machines, etc.

This article's statistics on semiconductor back-end test equipment (integrated circuit test equipment) mainly include three types of equipment: testers (ATE), handlers, and probe stations.

Testers, also known as automated test systems (ATE), are mainly used to conduct comprehensive testing of the functions and performance parameters of wafers and chips. This includes testing of semiconductor discrete devices (such as power semiconductor discrete devices and small signal discrete devices), as well as testing of analog and mixed-signal integrated circuits. This equipment plays an important role in the semiconductor industry chain and is widely used in the main links from chip design verification, testing during wafer manufacturing, to finished product testing after packaging is completed.

Handler is mainly used in the finished product inspection link of the design verification stage and the packaging test stage of integrated circuits. Its core function is to automatically transport the chip to be tested to the test area (that is, the location where the chip is connected to the test equipment and tested). In the test area, the pins of the chip are connected to the functional units of the test equipment through specific wiring. After the test equipment completes the test, it feeds the results back to the Handler, and the Handler identifies, classifies and collects the tested chips based on these test results.

The test machine (ATE) is a special equipment for testing the function and performance of the chip. The Handler and the probe station are special equipment for connecting the tested chips and wafers to the functional modules of the test machine and realizing batch automated testing.

In the wafer inspection stage, the main test equipment used is the probe station and the test machine, while in the chip design verification and finished product testing stages, the main test equipment used is the handler and the test machine.

Semiconductor back-end test equipment is a branch of the entire semiconductor equipment. From the perspective of the distribution of global semiconductor equipment sales regions, the market is mainly concentrated in mainland China and Taiwan, China, and the market share of the two regions will exceed 60% in 2024. However, from the perspective of equipment self-sufficiency, the level of localization in China is still relatively low. High-end semiconductor back-end test equipment manufacturers mainly come from Japan and other countries. In recent years, with the support of national policies, China's semiconductor industry has developed rapidly, and the sales scale of semiconductor back-end test equipment in mainland China has continued to grow. Chinese local companies such as Hangzhou Changchuan, Beijing Huafeng Test & Control Technology, PowerTECH Co., Ltd, and JHT Design Co., Ltd have occupied a certain share in the global back-end test equipment market.

From the perspective of the downstream of the industrial chain, the customer base of semiconductor back-end test equipment presents diversified characteristics, covering four core areas of OSAT, IDM and scientific research institutions, among which packaging and testing companies are the main ones. The differences in the needs of different customers reflect the trend of division of labor refinement and technology upgrading in the semiconductor industry. With the popularization of advanced packaging technologies (such as 3D packaging and system-level packaging), the development trends of test product technology mainly include a large number of tests, fast test speed, multi-functional modules, and high test accuracy. Packaging and testing companies need to use high-precision testing equipment to cope with the testing challenges of complex chips, and rely on big data analysis capabilities to optimize the test process and reduce costs. At the same time, the coexistence and development of equipment of multiple technical levels has also become one of the core development trends of semiconductor equipment.

The growth of the scale of semiconductor back-end test equipment depends on the expansion of the scale of the integrated circuit packaging market. From a technical perspective, the continuous breakthroughs in packaging technology directly push up the threshold of testing technology. Taking 3D packaging as an example, the vertical interconnection structure of through silicon vias (TSVs) needs to be tested at the micron level through a probe station, while the heterogeneous integration of multiple chips in

the system-level packaging (SiP) requires ATE equipment to have parallel testing, protocol compatibility, and extreme condition simulation capabilities. From the perspective of industrial chain division of labor, the independent operation of the packaging and testing links strengthens the stickiness of equipment demand. In order to serve global customers, OSAT needs to configure highly flexible handlers and modular ATE systems to adapt to cross-domain orders from consumer electronics to automotive electronics. Terminal application upgrades inject continuous momentum into the equipment market, such as 5G and new energy vehicles.

This report studies the global Semiconductor Back-End Test Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Back-End Test Equipment 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 Semiconductor Back-End Test Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Back-End Test Equipment total production and demand, 2021-2032, (Units)

Global Semiconductor Back-End Test Equipment total production value, 2021-2032, (USD Million)

Global Semiconductor Back-End Test Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Semiconductor Back-End Test Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Semiconductor Back-End Test Equipment domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Back-End Test Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Semiconductor Back-End Test Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Semiconductor Back-End Test Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Semiconductor Back-End Test Equipment 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 Accretech, TEL, Semics, Fittech, Sidea Semiconductor, FormFactor, Advantest, Teradyne, Cohu, Hangzhou

Changchuan Technology, 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 Semiconductor Back-End Test Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 Semiconductor Back-End Test Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Back-End Test Equipment Market, Segmentation by Type:

ATE

Handler

Probe Station

Global Semiconductor Back-End Test Equipment Market, Segmentation by Application:

IDM

OSAT

Companies Profiled:

Accretech

TEL

Semics

Fittech

Sidea Semiconductor

FormFactor

Advantest

Teradyne

Cohu

Hangzhou Changchuan Technology

YC Corp

Beijing Huafeng Test & Control Technology

Chroma ATE Inc

Hon Precision

SPEA

Shibasoku

Macrotest

PowerTECH

HON PRECISION, INC

JHT Design Co.,Ltd

Boston Semi Equipment

SESSCO Technologies

SYNAX

Microtec Handling Systems GmbH

Tesec Inc

Techwing

Kanematsu

UENO SEIKI NAGANO

Shanghai Cascol

Shenzhen Semishare

MPI Corporation

Micronics Japan

ASM Pacific Technology

Everbeing

MarTek

Micromanipulator

Signatone Corporation

HiSOL, Inc

KeyFactor Systems

Wentworth Laboratories

APOLLOWAVE

SemiProbe

MicroXact

KeithLink Technology

Ecopia

Shenzhen Cindbest Technology

ESDEMC Technology

Lake Shore Cryotronics

Wuhan Jingce Electronic Technology

Exatron

SEMES

Mirae Corporation

ATECO

Pentamaster

CETC45

Shenzhen Hi-Test Semiconductor Equipment Co., Ltd

Shenzhen Biaopu Semiconductor Technology

Shanghai YOUNG SOUL

Key Questions Answered:

1. How big is the global Semiconductor Back-End Test Equipment market?
2. What is the demand of the global Semiconductor Back-End Test Equipment market?
3. What is the year over year growth of the global Semiconductor Back-End Test Equipment market?
4. What is the production and production value of the global Semiconductor Back-End Test Equipment market?
5. Who are the key producers in the global Semiconductor Back-End Test Equipment market?
6. What are the growth factors driving the market demand?

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