

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

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## Abstracts

The global Semiconductor Probe Station market size is expected to reach \$ 2673 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

In 2025, global Semiconductor Probe Station production reached approximately 14811 Units, with an average global market price of around 103.4 K USD per Unit.

A semiconductor probe station is a device used in semiconductor development and manufacturing processes to inspect the electrical characteristics of wafers. Its core function is to precisely contact the probes on a probe card with the chip pads/bumps on the wafer surface, establishing an electrical connection between the test system and the chip. This allows for the application of electrical signals and the measurement of electrical parameters (voltage, current, resistance, timing, etc.), enabling yield screening, defect location, and process verification. The semiconductor probe station is one of the most important inspection equipment in the semiconductor industry, widely used for precision electrical measurements of complex, high-speed devices. Its purpose is to ensure quality and reliability while reducing R&D time and device manufacturing costs.

The upstream raw materials for semiconductor probe stations mainly include microscopes, probe holders (positioners), industrial computers, LCD panels, probes and probe clamps, cable assemblies, and steel structural housings. Typical raw material suppliers include Carl Zeiss, Olympus, Nikon, Leica, Motic, and FormFactor.

Downstream applications are primarily in IDMs, OSATs, and scientific research, with typical users including Sanan Optoelectronics, Huatian Technology, Silan Microelectronics, Yandong Microelectronics, CR Microelectronics, BYD, HC SemiTek, ASE, and Amkor Technology.

The single-line production capacity of semiconductor probe stations varies greatly depending on wafer size, probe configuration, temperature/environment requirements,

and degree of automation, typically ranging from hundreds to thousands of units. The gross profit margin of semiconductor probe stations is usually in the range of 30%-40%.

At present, the explosive growth of global demand for artificial intelligence (AI) and high-performance computing (HPC) has accelerated the development progress of cutting-edge technologies, the commercialization of products, market development, and the layout of the industrial chain, effectively driving the market demand for related computing power and storage chips. After two years of technological improvements and ecological construction, emerging consumer electronic products such as smart wearable devices and smart homes have given birth to hot products such as AppleVision, becoming an important driving force for the growth of the semiconductor market. Automotive electronics, lithium batteries, photovoltaics and other previous high-speed growth fields have entered a critical window period for technology route selection and technology pattern reconstruction. New formats and models such as industrial Internet, smart medical care, and smart cities are accelerating their transformation, empowering social development and bringing about an increase in overall semiconductor market demand. According to statistics from the World Integrated Circuit Association (WICA), the global semiconductor market size in 2024 will be US\$620.2 billion, a year-on-year increase of 17%.

From the perspective of product structure, it is expected that the two main integrated circuit categories will drive market growth with double-digit growth, with logic chips expected to grow by 21% and memory expected to grow by 61.3%. Other categories such as discrete devices, optoelectronic devices, sensors and analog chips are expected to show a negative growth of 2%-10%. Thanks to the surge in demand for computing chips from AI big models such as ChatGPT, the market growth rate of logic chips such as GPU, FPGA, and ASIC in 2024 will be 4 percentage points higher than the industry average. The current market demand for Hopper remains strong, and AI manufacturers expect continued growth in Blackwell. With the repeated computing upgrades of AI big models, the market demand for high-performance logic chips will continue to rise in the future. By 2030, the semiconductor market size is expected to reach US\$1 trillion, with a compound annual growth rate of approximately 8%.

Wafer testing is an important step performed in the manufacturing process of semiconductor devices. In this step, all individual integrated circuits present on the wafer are tested for functional defects by applying special test modes to them before the wafer is sent to chip preparation. Semiconductor Probe Station play a vital role in chip manufacturing.

In the global competition landscape of semiconductor Probe Station, Tokyo Seimitsu, Tokyo Electron, and Semis occupy a large market share. In 2025, CR3 is as high as 70%, and the market concentration is relatively high. In the Chinese (including Taiwan)

market, high-end semiconductor Probe Station are dominated by imports from the international market (Tokyo Seimitsu, Tokyo Electron, Semis, etc.), and low-end and mid-end products have begun to form a trend of domestic substitution. As the country pays more and more attention to independent technology research and development and policy support, it is expected that the domestic market will have great potential in the future.

Semiconductor Probe Station can be divided into three types according to the degree of automation: manual, semi-automatic, and fully automatic. The low-cost advantages of manual and semi-automatic probe station instruments are mainly used in small-batch R&D tests. The advantages of fully automatic Probe Station are their high degree of automation, high precision and versatility, which can greatly improve test efficiency and accuracy. They are mainly used in OSAT and IDMs, etc. According to our data, the revenue of fully automatic semiconductor Probe Station will account for more than 60% in 2025.

The downstream customers of the semiconductor probe station industry chain mainly include integrated device manufacturers (IDMs), outsourced packaging and testing companies (OSATs), etc. According to research, OSATs currently account for more than 60% of the market share. In general, the growth in demand for semiconductor probe station equipment ultimately depends on the growth in the scope of chip applications, the increase in chip demand, the diversification of chip design models by chip design companies, and the change in the number of chips produced by foundries. With the main line of 'high precision + intelligence', along with the iteration of semiconductor processes and the application of new materials, the technology and market potential of Probe Station will be further released.

This report studies the global Semiconductor Probe Station production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Probe Station 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 Probe Station that contribute to its increasing demand across many markets.

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

Global Semiconductor Probe Station total production and demand, 2021-2032, (Units)

Global Semiconductor Probe Station total production value, 2021-2032, (USD Million)

Global Semiconductor Probe Station production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Semiconductor Probe Station consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Semiconductor Probe Station domestic production, consumption, key

domestic manufacturers and share

Global Semiconductor Probe Station production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Semiconductor Probe Station production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Semiconductor Probe Station production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Semiconductor Probe Station 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 Tokyo Seimitsu, Tokyo Electron, Semics, Shen Zhen Sidea, FitTech, FormFactor, MPI, Semishare Electronic, MarTek (Electroglas), MicroXact, 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 Probe Station market

#### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K USD/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 Probe Station Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Probe Station Market, Segmentation by Type:

Manual Probe Station

Semi Auto Probe Station

Auto Probe Station

Global Semiconductor Probe Station Market, Segmentation by Wafer:

200mm Wafer Type

300mm Wafer Type

Others

Global Semiconductor Probe Station Market, Segmentation by Temperature:

Normal Temperature

High and Low Temperature

Others

Global Semiconductor Probe Station Market, Segmentation by Application:

Residential

Commercial

Industrial

Others

## **Companies Profiled:**

Tokyo Seimitsu

Tokyo Electron

Semics

Shen Zhen Sidea

FitTech

FormFactor

MPI

Semishare Electronic

MarTek (Electroglas)

MicroXact

Wentworth Laboratories

SemiProbe

ESDEMC Technology

STAR TECHNOLOGIES

Pegasus Instrument

POMME TECHNOLOGIES

Micronics Japan

Lake Shore Cryotronics

Micromanipulator

KeithLink

Psaic

Everbeing

KeyFactor Systems

Tec Semiconductor Equipment (Shenzhen)

ChangChun Guanghua Micro-Electronic Equipment

Hangzhou Changchuan Technology

Semipeak

Chengdu Yunyi Zhichuang Technology

Titan Micro Electronics

Jingxin Intelligent Equipment (Suzhou)

LINKPHYSICS

Shanghai Junchen Automation Technology

CETC(45th Research Institutes)

Shenzhen Cindbest Technology

### **Key Questions Answered:**

1. How big is the global Semiconductor Probe Station market?
2. What is the demand of the global Semiconductor Probe Station market?
3. What is the year over year growth of the global Semiconductor Probe Station market?
4. What is the production and production value of the global Semiconductor Probe

Station market?

5. Who are the key producers in the global Semiconductor Probe Station market?

6. What are the growth factors driving the market demand?

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