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Global Automated Probe Systems Market Growth 2026-2032

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Abstracts

The global Automated Probe Systems market size is predicted to grow from US$ 1188 million in 2025 to US$ 1665 million in 2032; it is expected to grow at a CAGR of 5.0% from 2026 to 2032.

A Probe System is a device used to detect the electrical characteristics of a wafer during semiconductor development and manufacturing. Electrical testing involves sending test signals from a tester or tester to each device on the wafer through a probe or probe card, and obtaining signal feedback from each device. Automated Probe Systems is a type of semiconductor testing equipment. Its main function is to achieve automatic alignment and contact between the probe and the test point on the wafer or chip to perform electrical characteristic measurement, functional testing or other related analysis.

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

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semiconductor market demand. According to statistics from the World Integrated Circuit Association (WICA), the global semiconductor market size in 2024 was about 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 have 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 during the manufacturing process of semiconductor devices. In this step, which is performed before the wafer is sent to chip preparation, all individual integrated circuits present on the wafer are tested for functional defects by applying special test patterns to them. Automated Probe Systems are usually responsible for loading and unloading wafers from carriers and are equipped with automatic pattern recognition optics that can align wafers with sufficient accuracy to ensure accurate alignment between contact pads on the wafer and probe tips. For electrical testing, a set of microscopic contacts or probes of a probe card are fixed in place while the wafer vacuum-mounted on the wafer chuck is moved into electrical contact. When a die is electrically tested, the probe station moves the wafer to the next die and the next test begins. In the chip manufacturing and testing process, Automated Probe Systems are used for wafer-level testing, which can detect defective chips in a timely manner and play a vital role in chip manufacturing. According to our data, the global sales of Automated Probe Systems will be 14,000 units in 2024, and it is expected to exceed 20,000 units by 2030, with a compound annual growth rate of approximately 6.4%.

In the global competition landscape of Automated Probe Systems, Tokyo Seimitsu, Tokyo Electron, and Semis occupy a large market share, with CR3 reaching 70% in 2024, and the market concentration is relatively high. The manufacturers of Automated Probe Systems in China (including Taiwan) are mainly Shen Zhen Sidea, FitTech, etc.; in the Chinese market, high-end Automated Probe Systems are dominated by imports

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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.

Automated Probe Systems can be divided into two categories according to the structure of the workbench: Ball Screw Linear Translation Stage and Plane Stepper Motor XY-Stage, namely: Plane Stepper Motor XY-Stage probe stations represented by American companies and Ball Screw Linear Translation Stage probe stations produced in Japan and European countries. According to our data, in 2024, the market share of Automated Probe Systems in the Ball Screw Linear Translation Stage will exceed 65%, and the share will continue to grow.

The downstream customers of the Automated Probe Systems 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 Automated Probe Systems ultimately depends on the growth in the application range of chips, 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.

The advantages of Automated Probe Systems are their high degree of automation, high precision and versatility, which can greatly improve test efficiency and accuracy. However, with the continuous development of semiconductor technology, the requirements for test equipment are also getting higher and higher. Therefore, Automated Probe Systems need to be continuously updated and upgraded to adapt to new test needs and challenges.

LP Information, Inc. (LPI) ' newest research report, the ?Automated Probe Systems Industry Forecast? looks at past sales and reviews total world Automated Probe Systems sales in 2025, providing a comprehensive analysis by region and market sector of projected Automated Probe Systems sales for 2026 through 2032. With Automated Probe Systems sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automated Probe Systems industry.

This Insight Report provides a comprehensive analysis of the global Automated Probe Systems landscape and highlights key trends related to product segmentation, company

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formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automated Probe Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Automated Probe Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automated Probe Systems and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automated Probe Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of Automated Probe Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Ball Screw Linear Translation Stage

Plane Stepper Motor XY-Stage

Segmentation by Application:

IDMs

OSAT

Others

This report also splits the market by region:

Americas

United States

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Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

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Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

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POMME TECHNOLOGIES

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automated Probe Systems market?

What factors are driving Automated Probe Systems market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automated Probe Systems market opportunities vary by end market size?

How does Automated Probe Systems break out by Type, by Application?

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Application (2027-2032)

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