

# Global HPC, AI and ASIC Industry Probe Cards Market Growth 2026-2032

<https://marketpublishers.com/r/G5B7B32C78E7EN.html>

Date: May 2026

Pages: 137

Price: US\$ 3,660.00 (Single User License)

ID: G5B7B32C78E7EN

## Abstracts

The global HPC, AI and ASIC Industry Probe Cards market size is predicted to grow from US\$ 1066 million in 2025 to US\$ 1730 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 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.

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

millions of the world HPC, AI and ASIC Industry Probe Cards industry.

This Insight Report provides a comprehensive analysis of the global HPC, AI and ASIC Industry Probe Cards landscape and highlights key trends related to product segmentation, company 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 HPC, AI and ASIC Industry Probe Cards portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global HPC, AI and ASIC Industry Probe Cards market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HPC, AI and ASIC Industry Probe Cards 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 HPC, AI and ASIC Industry Probe Cards.

This report presents a comprehensive overview, market shares, and growth opportunities of HPC, AI and ASIC Industry Probe Cards market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

MEMS Probe Cards

Vertical Probe Cards (VPC)

Advanced Cantilever Probe Cards

Segmentation by Pin Count & Density:

Ultra-High-Density Probe Cards

High-Density Probe Cards

Medium-Density Probe Cards

### Segmentation by Electrical Performance & Test Requirements:

High-Speed Signal Probe Cards

High-Current Power Probe Cards

Mixed-Signal ASIC Probe Cards

### Segmentation by Application:

HPC

AI

ASIC

### This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

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.

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 Addressed in this Report**

What is the 10-year outlook for the global HPC, AI and ASIC Industry Probe Cards market?

What factors are driving HPC, AI and ASIC Industry Probe Cards market growth, globally and by region?

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

How do HPC, AI and ASIC Industry Probe Cards market opportunities vary by end market size?

How does HPC, AI and ASIC Industry Probe Cards break out by Type, by Application?

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