

# Global Integrated Circuit Testing Equipment Market Growth 2026-2032

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## Abstracts

The global Integrated Circuit Testing Equipment market size is predicted to grow from US\$ 7013 million in 2025 to US\$ 11540 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Integrated circuit testing equipment mainly includes testing machines, sorting machines, and probe tables. Testing machines are specialized equipment for detecting chip functionality and performance. Sorting machines and probe tables are specialized equipment that connect the tested chips and wafers with the functional modules of the testing machine and achieve batch automated testing. The sorter is mainly used in the verification link in the integrated circuit design stage and the finished product test link in the packaging test stage. Its main purpose is: the sorter automatically transmits the chip to be tested to the test station (used to connect the chip to the test machine and test the position), and the pin of the chip to be tested is connected to the functional module of the test machine through the special connection line on the test station, After testing, the testing machine transmits the test results to the sorting machine, which marks, classifies, and receives the detected chips based on the test results.

Following two years of contraction caused by challenging macroeconomic conditions and softening semiconductor demand, the back-end equipment segment is anticipated to start its recovery in the second half of 2024. Specifically, sales of semiconductor test equipment are projected to rise 7.4% to \$6.7 billion in 2024, while assembly and packaging equipment sales are predicted to increase 10.0% to \$4.4 billion in the same year. Furthermore, back-end segment growth is expected to accelerate in 2025, with test equipment sales surging 30.3% and assembly and packaging sales increasing 34.9%. The segments' growth is supported by the increasing complexity of semiconductor devices for high-performance computing and the expected recovery in

demand for automotive, industrial, and consumer electronics end-markets. Additionally, back-end growth is expected to increase over time to process ramping supply from new front-end fabs.

The global Integrated Circuit Testing Equipment market is evolving rapidly as chip complexity and quality requirements increase, driven by growth in fields such as AI, 5G, automotive, and IoT. Here are some prominent trends shaping this market:

### 1. Rising Demand for High-Performance and Advanced Chips

**Advanced Applications:** AI, autonomous driving, and 5G require high-performance chips, which drive demand for precise and advanced testing solutions that ensure quality and reliability.

**Increased Package Complexity:** Packaging technologies such as 3D, Fan-out, and System-in-Package (SiP) are gaining popularity, increasing the complexity of chips and thus the need for more sophisticated testing equipment capable of verifying intricate multi-layer structures and connections.

### 2. Automation and Smart Manufacturing

**Automated Test Equipment (ATE):** Automation in testing equipment is becoming crucial to minimize manual intervention and enhance throughput. Automated Optical Inspection (AOI) and Automated X-ray Inspection (AXI) systems allow rapid, accurate, and cost-effective inspection of chips.

**AI-Powered Defect Detection:** AI algorithms and machine learning are being incorporated into test equipment to increase defect detection accuracy and reduce false positives. Smart algorithms can also streamline production by identifying trends and patterns in data that help optimize production workflows.

### 3. Diverse Testing Techniques for Various Applications

**Electrical Testing:** Electrical test systems are crucial for assessing chip functionality, such as conductivity, response time, and power consumption, with increased demand for accuracy as chip complexity rises.

**Optical and X-Ray Testing:** These methods are essential for detecting structural and connectivity issues within complex packages without destructive testing, ensuring the

reliability of interconnects and internal connections.

**Thermal and Mechanical Stress Testing:** For automotive, aerospace, and high-performance computing chips, back-end testing now includes advanced thermal and mechanical stress assessments to ensure chips meet specific environmental resilience standards.

#### 4. Increased Demand from Emerging Markets

**Asia-Pacific Market Expansion:** With manufacturing investments rising in countries like China, Taiwan, and South Korea, the demand for back-end testing equipment is expanding. This growth is partly due to regional semiconductor manufacturing initiatives to strengthen local supply chains.

**Localized Production and Customization:** Back-end test equipment suppliers are increasingly focusing on customization for specific regional and industry requirements, adapting to unique product types and packaging standards.

#### 5. New Packaging Technologies and Testing Needs

**3D Integration and System-Level Testing:** With the rise of 3D integration in chips, testing equipment must handle more comprehensive functional tests for vertical stacks within a single package, increasing the complexity of the process.

**Heterogeneous Integration:** As more diverse components (e.g., MEMS, sensors, RF) are integrated into single packages, back-end test equipment must evolve to handle a wider range of testing conditions and requirements.

#### 6. High Precision and Low-Cost Production Efficiency

**Lowering Test Costs:** As semiconductor production scales up, lowering testing costs becomes crucial. Equipment providers are innovating ways to enhance efficiency and throughput, balancing speed and accuracy to meet high-volume requirements.

**Multi-Functional Test Equipment:** Some test solutions are integrating multiple capabilities, allowing manufacturers to conduct different types of tests in a single setup. This consolidation reduces both space and investment costs, appealing to high-volume production environments.

## 7. Influence of 5G, IoT, and Automotive Growth

**IoT and 5G:** Increased production of 5G-enabled and IoT chips requires back-end testing equipment that supports higher frequencies and ensures robust connectivity.

**Automotive Electronics:** Automotive applications require high reliability and safety standards, as chips must operate under various temperature ranges and withstand mechanical stress. Testing equipment now includes advanced stress and durability assessments specifically designed for automotive-grade chips.

## 8. Focus on Quality and Compliance Standards

**Stringent Quality Control:** As semiconductor chips become essential in critical systems, such as in medical devices and autonomous vehicles, stricter quality controls and regulatory standards are being imposed, driving demand for testing equipment that meets stringent compliance standards.

**Reliability Testing:** High-reliability testing is growing, particularly for chips used in critical applications where failure is not an option. This includes reliability test equipment capable of simulating operational stresses over extended periods.

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

This Insight Report provides a comprehensive analysis of the global Integrated Circuit Testing Equipment 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 Integrated Circuit Testing Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Integrated Circuit Testing Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Integrated Circuit Testing Equipment 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 Integrated Circuit Testing Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Integrated Circuit Testing Equipment market by product type, application, key manufacturers and key regions and countries.

**Segmentation by Type:**

Semiconductor Testing Machine

Test Handler

Probe Station

**Segmentation by Application:**

IDMs

OSATs

Other (Foundry, Research Institutes, etc.)

**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.

Advantest

Teradyne

Cohu, Inc. (Incl. Xcerra & MCT)

Tokyo Seimitsu

Tokyo Electron

Changchuan Technology

Beijing Huafeng

Hon Precision

Semics

Tianjin JHT Design

Techwing

Fittech

ASM Pacific Technology

Chroma ATE

Shen Zhen Sidea

Exicon

Shenkeda Semiconductor

Boston Semi Equipment

Kanematsu (Epson)

EXIS TECH

MIRAE

SEMES

SRM Integration

FormFactor

ShibaSoku

Semishare

Shanghai Yingshuo

MPI

Micronics Japan

TESEC Corporation

YoungTek Electronics Corp (YTEC)

Ueno Seiki

PowerTECH

JT Corp

SYNAX

Genesem

Pentamaster

Lake Shore Cryotronics

ATECO

Innegrity Pte Ltd

Fuzhou Palide

Everbeing

MarTek (Electroglas)

Micromanipulator

Signatone

M?hlbauer

HiSOL

Shanghai Cascol

ITEC

KeyFactor Systems

Wentworth Laboratories

APOLLOWAVE

Semiconductor Technologies & Instruments

SemiProbe

MicroXact

Shenzhen Biaopu Semiconductor

Ecopia

KeithLink Technology

Shenzhen Good-Machine Automation Equipment

MIT Semiconductor

Shenzhen Cindbest Technology

ESDEMC Technology

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Integrated Circuit Testing Equipment market?

What factors are driving Integrated Circuit Testing Equipment market growth, globally and by region?

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

How do Integrated Circuit Testing Equipment market opportunities vary by end market size?

How does Integrated Circuit Testing Equipment break out by Type, by Application?

The report requires updating with new data and is sent in 48 hours after order is placed.

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global Integrated Circuit Testing Equipment Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Integrated Circuit Testing Equipment by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Integrated Circuit Testing Equipment by Country/Region, 2021, 2025 & 2032

#### 2.2 Integrated Circuit Testing Equipment Segment by Type

- 2.2.1 Semiconductor Testing Machine
- 2.2.2 Test Handler
- 2.2.3 Probe Station
- 2.2.4 Integrated Circuit Testing Equipment Sales by Type
  - 2.2.4.1 Global Integrated Circuit Testing Equipment Sales Market Share by Type (2021-2026)
  - 2.2.4.2 Global Integrated Circuit Testing Equipment Revenue and Market Share by Type (2021-2026)
  - 2.2.4.3 Global Integrated Circuit Testing Equipment Sale Price by Type (2021-2026)

#### 2.3 Integrated Circuit Testing Equipment Segment by Application

- 2.3.1 IDMs
- 2.3.2 OSATs
- 2.3.3 Other (Foundry, Research Institutes, etc.)
- 2.3.4 Integrated Circuit Testing Equipment Sales by Application
  - 2.3.4.1 Global Integrated Circuit Testing Equipment Sale Market Share by Application (2021-2026)
  - 2.3.4.2 Global Integrated Circuit Testing Equipment Revenue and Market Share by

Application (2021-2026)

2.3.4.3 Global Integrated Circuit Testing Equipment Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global Integrated Circuit Testing Equipment Breakdown Data by Company

3.1.1 Global Integrated Circuit Testing Equipment Annual Sales by Company (2021-2026)

3.1.2 Global Integrated Circuit Testing Equipment Sales Market Share by Company (2021-2026)

3.2 Global Integrated Circuit Testing Equipment Annual Revenue by Company (2021-2026)

3.2.1 Global Integrated Circuit Testing Equipment Revenue by Company (2021-2026)

3.2.2 Global Integrated Circuit Testing Equipment Revenue Market Share by Company (2021-2026)

3.3 Global Integrated Circuit Testing Equipment Sale Price by Company

3.4 Key Manufacturers Integrated Circuit Testing Equipment Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Integrated Circuit Testing Equipment Product Location Distribution

3.4.2 Players Integrated Circuit Testing Equipment Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

### **4 WORLD HISTORIC REVIEW FOR INTEGRATED CIRCUIT TESTING EQUIPMENT BY GEOGRAPHIC REGION**

4.1 World Historic Integrated Circuit Testing Equipment Market Size by Geographic Region (2021-2026)

4.1.1 Global Integrated Circuit Testing Equipment Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Integrated Circuit Testing Equipment Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Integrated Circuit Testing Equipment Market Size by Country/Region (2021-2026)

4.2.1 Global Integrated Circuit Testing Equipment Annual Sales by Country/Region (2021-2026)

4.2.2 Global Integrated Circuit Testing Equipment Annual Revenue by Country/Region (2021-2026)

4.3 Americas Integrated Circuit Testing Equipment Sales Growth

4.4 APAC Integrated Circuit Testing Equipment Sales Growth

4.5 Europe Integrated Circuit Testing Equipment Sales Growth

4.6 Middle East & Africa Integrated Circuit Testing Equipment Sales Growth

## **5 AMERICAS**

5.1 Americas Integrated Circuit Testing Equipment Sales by Country

5.1.1 Americas Integrated Circuit Testing Equipment Sales by Country (2021-2026)

5.1.2 Americas Integrated Circuit Testing Equipment Revenue by Country (2021-2026)

5.2 Americas Integrated Circuit Testing Equipment Sales by Type (2021-2026)

5.3 Americas Integrated Circuit Testing Equipment Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

## **6 APAC**

6.1 APAC Integrated Circuit Testing Equipment Sales by Region

6.1.1 APAC Integrated Circuit Testing Equipment Sales by Region (2021-2026)

6.1.2 APAC Integrated Circuit Testing Equipment Revenue by Region (2021-2026)

6.2 APAC Integrated Circuit Testing Equipment Sales by Type (2021-2026)

6.3 APAC Integrated Circuit Testing Equipment Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

## **7 EUROPE**

7.1 Europe Integrated Circuit Testing Equipment by Country

- 7.1.1 Europe Integrated Circuit Testing Equipment Sales by Country (2021-2026)
- 7.1.2 Europe Integrated Circuit Testing Equipment Revenue by Country (2021-2026)
- 7.2 Europe Integrated Circuit Testing Equipment Sales by Type (2021-2026)
- 7.3 Europe Integrated Circuit Testing Equipment Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

## **8 MIDDLE EAST & AFRICA**

- 8.1 Middle East & Africa Integrated Circuit Testing Equipment by Country
  - 8.1.1 Middle East & Africa Integrated Circuit Testing Equipment Sales by Country (2021-2026)
  - 8.1.2 Middle East & Africa Integrated Circuit Testing Equipment Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Integrated Circuit Testing Equipment Sales by Type (2021-2026)
- 8.3 Middle East & Africa Integrated Circuit Testing Equipment Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Integrated Circuit Testing Equipment
- 10.3 Manufacturing Process Analysis of Integrated Circuit Testing Equipment
- 10.4 Industry Chain Structure of Integrated Circuit Testing Equipment

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

### 11.1 Sales Channel

#### 11.1.1 Direct Channels

#### 11.1.2 Indirect Channels

### 11.2 Integrated Circuit Testing Equipment Distributors

### 11.3 Integrated Circuit Testing Equipment Customer

## **12 WORLD FORECAST REVIEW FOR INTEGRATED CIRCUIT TESTING EQUIPMENT BY GEOGRAPHIC REGION**

### 12.1 Global Integrated Circuit Testing Equipment Market Size Forecast by Region

#### 12.1.1 Global Integrated Circuit Testing Equipment Forecast by Region (2027-2032)

#### 12.1.2 Global Integrated Circuit Testing Equipment Annual Revenue Forecast by Region (2027-2032)

### 12.2 Americas Forecast by Country (2027-2032)

### 12.3 APAC Forecast by Region (2027-2032)

### 12.4 Europe Forecast by Country (2027-2032)

### 12.5 Middle East & Africa Forecast by Country (2027-2032)

### 12.6 Global Integrated Circuit Testing Equipment Forecast by Type (2027-2032)

### 12.7 Global Integrated Circuit Testing Equipment Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

### 13.1 Advantest

#### 13.1.1 Advantest Company Information

#### 13.1.2 Advantest Integrated Circuit Testing Equipment Product Portfolios and Specifications

#### 13.1.3 Advantest Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.1.4 Advantest Main Business Overview

#### 13.1.5 Advantest Latest Developments

### 13.2 Teradyne

#### 13.2.1 Teradyne Company Information

#### 13.2.2 Teradyne Integrated Circuit Testing Equipment Product Portfolios and Specifications

#### 13.2.3 Teradyne Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.2.4 Teradyne Main Business Overview
- 13.2.5 Teradyne Latest Developments
- 13.3 Cohu, Inc. (Incl. Xcerra & MCT)
  - 13.3.1 Cohu, Inc. (Incl. Xcerra & MCT) Company Information
  - 13.3.2 Cohu, Inc. (Incl. Xcerra & MCT) Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.3.3 Cohu, Inc. (Incl. Xcerra & MCT) Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.3.4 Cohu, Inc. (Incl. Xcerra & MCT) Main Business Overview
  - 13.3.5 Cohu, Inc. (Incl. Xcerra & MCT) Latest Developments
- 13.4 Tokyo Seimitsu
  - 13.4.1 Tokyo Seimitsu Company Information
  - 13.4.2 Tokyo Seimitsu Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.4.3 Tokyo Seimitsu Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.4.4 Tokyo Seimitsu Main Business Overview
  - 13.4.5 Tokyo Seimitsu Latest Developments
- 13.5 Tokyo Electron
  - 13.5.1 Tokyo Electron Company Information
  - 13.5.2 Tokyo Electron Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.5.3 Tokyo Electron Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.5.4 Tokyo Electron Main Business Overview
  - 13.5.5 Tokyo Electron Latest Developments
- 13.6 Changchuan Technology
  - 13.6.1 Changchuan Technology Company Information
  - 13.6.2 Changchuan Technology Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.6.3 Changchuan Technology Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.6.4 Changchuan Technology Main Business Overview
  - 13.6.5 Changchuan Technology Latest Developments
- 13.7 Beijing Huafeng
  - 13.7.1 Beijing Huafeng Company Information
  - 13.7.2 Beijing Huafeng Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.7.3 Beijing Huafeng Integrated Circuit Testing Equipment Sales, Revenue, Price

and Gross Margin (2021-2026)

13.7.4 Beijing Huafeng Main Business Overview

13.7.5 Beijing Huafeng Latest Developments

13.8 Hon Precision

13.8.1 Hon Precision Company Information

13.8.2 Hon Precision Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.8.3 Hon Precision Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Hon Precision Main Business Overview

13.8.5 Hon Precision Latest Developments

13.9 Semics

13.9.1 Semics Company Information

13.9.2 Semics Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.9.3 Semics Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Semics Main Business Overview

13.9.5 Semics Latest Developments

13.10 Tianjin JHT Design

13.10.1 Tianjin JHT Design Company Information

13.10.2 Tianjin JHT Design Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.10.3 Tianjin JHT Design Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Tianjin JHT Design Main Business Overview

13.10.5 Tianjin JHT Design Latest Developments

13.11 Techwing

13.11.1 Techwing Company Information

13.11.2 Techwing Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.11.3 Techwing Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Techwing Main Business Overview

13.11.5 Techwing Latest Developments

13.12 Fittech

13.12.1 Fittech Company Information

13.12.2 Fittech Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.12.3 Fittech Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Fittech Main Business Overview

13.12.5 Fittech Latest Developments

13.13 ASM Pacific Technology

13.13.1 ASM Pacific Technology Company Information

13.13.2 ASM Pacific Technology Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.13.3 ASM Pacific Technology Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 ASM Pacific Technology Main Business Overview

13.13.5 ASM Pacific Technology Latest Developments

13.14 Chroma ATE

13.14.1 Chroma ATE Company Information

13.14.2 Chroma ATE Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.14.3 Chroma ATE Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Chroma ATE Main Business Overview

13.14.5 Chroma ATE Latest Developments

13.15 Shen Zhen Sidea

13.15.1 Shen Zhen Sidea Company Information

13.15.2 Shen Zhen Sidea Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.15.3 Shen Zhen Sidea Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Shen Zhen Sidea Main Business Overview

13.15.5 Shen Zhen Sidea Latest Developments

13.16 Exicon

13.16.1 Exicon Company Information

13.16.2 Exicon Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.16.3 Exicon Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Exicon Main Business Overview

13.16.5 Exicon Latest Developments

13.17 Shenkeda Semiconductor

13.17.1 Shenkeda Semiconductor Company Information

13.17.2 Shenkeda Semiconductor Integrated Circuit Testing Equipment Product

## Portfolios and Specifications

13.17.3 Shenkeda Semiconductor Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Shenkeda Semiconductor Main Business Overview

13.17.5 Shenkeda Semiconductor Latest Developments

## 13.18 Boston Semi Equipment

13.18.1 Boston Semi Equipment Company Information

13.18.2 Boston Semi Equipment Integrated Circuit Testing Equipment Product

## Portfolios and Specifications

13.18.3 Boston Semi Equipment Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Boston Semi Equipment Main Business Overview

13.18.5 Boston Semi Equipment Latest Developments

## 13.19 Kanematsu (Epson)

13.19.1 Kanematsu (Epson) Company Information

13.19.2 Kanematsu (Epson) Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.19.3 Kanematsu (Epson) Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Kanematsu (Epson) Main Business Overview

13.19.5 Kanematsu (Epson) Latest Developments

## 13.20 EXIS TECH

13.20.1 EXIS TECH Company Information

13.20.2 EXIS TECH Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.20.3 EXIS TECH Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 EXIS TECH Main Business Overview

13.20.5 EXIS TECH Latest Developments

## 13.21 MIRAE

13.21.1 MIRAE Company Information

13.21.2 MIRAE Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.21.3 MIRAE Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 MIRAE Main Business Overview

13.21.5 MIRAE Latest Developments

## 13.22 SEMES

13.22.1 SEMES Company Information

13.22.2 SEMES Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.22.3 SEMES Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 SEMES Main Business Overview

13.22.5 SEMES Latest Developments

13.23 SRM Integration

13.23.1 SRM Integration Company Information

13.23.2 SRM Integration Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.23.3 SRM Integration Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 SRM Integration Main Business Overview

13.23.5 SRM Integration Latest Developments

13.24 FormFactor

13.24.1 FormFactor Company Information

13.24.2 FormFactor Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.24.3 FormFactor Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 FormFactor Main Business Overview

13.24.5 FormFactor Latest Developments

13.25 ShibaSoku

13.25.1 ShibaSoku Company Information

13.25.2 ShibaSoku Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.25.3 ShibaSoku Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 ShibaSoku Main Business Overview

13.25.5 ShibaSoku Latest Developments

13.26 Semishare

13.26.1 Semishare Company Information

13.26.2 Semishare Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.26.3 Semishare Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 Semishare Main Business Overview

13.26.5 Semishare Latest Developments

13.27 Shanghai Yingshuo

- 13.27.1 Shanghai Yingshuo Company Information
- 13.27.2 Shanghai Yingshuo Integrated Circuit Testing Equipment Product Portfolios and Specifications
- 13.27.3 Shanghai Yingshuo Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.27.4 Shanghai Yingshuo Main Business Overview
- 13.27.5 Shanghai Yingshuo Latest Developments
- 13.28 MPI
- 13.28.1 MPI Company Information
- 13.28.2 MPI Integrated Circuit Testing Equipment Product Portfolios and Specifications
- 13.28.3 MPI Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.28.4 MPI Main Business Overview
- 13.28.5 MPI Latest Developments
- 13.29 Micronics Japan
- 13.29.1 Micronics Japan Company Information
- 13.29.2 Micronics Japan Integrated Circuit Testing Equipment Product Portfolios and Specifications
- 13.29.3 Micronics Japan Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.29.4 Micronics Japan Main Business Overview
- 13.29.5 Micronics Japan Latest Developments
- 13.30 TESEC Corporation
- 13.30.1 TESEC Corporation Company Information
- 13.30.2 TESEC Corporation Integrated Circuit Testing Equipment Product Portfolios and Specifications
- 13.30.3 TESEC Corporation Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.30.4 TESEC Corporation Main Business Overview
- 13.30.5 TESEC Corporation Latest Developments
- 13.31 YoungTek Electronics Corp (YTEC)
- 13.31.1 YoungTek Electronics Corp (YTEC) Company Information
- 13.31.2 YoungTek Electronics Corp (YTEC) Integrated Circuit Testing Equipment Product Portfolios and Specifications
- 13.31.3 YoungTek Electronics Corp (YTEC) Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.31.4 YoungTek Electronics Corp (YTEC) Main Business Overview
- 13.31.5 YoungTek Electronics Corp (YTEC) Latest Developments

### 13.32 Ueno Seiki

13.32.1 Ueno Seiki Company Information

13.32.2 Ueno Seiki Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.32.3 Ueno Seiki Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.32.4 Ueno Seiki Main Business Overview

13.32.5 Ueno Seiki Latest Developments

### 13.33 PowerTECH

13.33.1 PowerTECH Company Information

13.33.2 PowerTECH Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.33.3 PowerTECH Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.33.4 PowerTECH Main Business Overview

13.33.5 PowerTECH Latest Developments

### 13.34 JT Corp

13.34.1 JT Corp Company Information

13.34.2 JT Corp Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.34.3 JT Corp Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.34.4 JT Corp Main Business Overview

13.34.5 JT Corp Latest Developments

### 13.35 SYNAX

13.35.1 SYNAX Company Information

13.35.2 SYNAX Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.35.3 SYNAX Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.35.4 SYNAX Main Business Overview

13.35.5 SYNAX Latest Developments

### 13.36 Genesem

13.36.1 Genesem Company Information

13.36.2 Genesem Integrated Circuit Testing Equipment Product Portfolios and Specifications

13.36.3 Genesem Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.36.4 Genesem Main Business Overview

- 13.36.5 Genesem Latest Developments
- 13.37 Pentamaster
  - 13.37.1 Pentamaster Company Information
  - 13.37.2 Pentamaster Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.37.3 Pentamaster Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.37.4 Pentamaster Main Business Overview
  - 13.37.5 Pentamaster Latest Developments
- 13.38 Lake Shore Cryotronics
  - 13.38.1 Lake Shore Cryotronics Company Information
  - 13.38.2 Lake Shore Cryotronics Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.38.3 Lake Shore Cryotronics Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.38.4 Lake Shore Cryotronics Main Business Overview
  - 13.38.5 Lake Shore Cryotronics Latest Developments
- 13.39 ATECO
  - 13.39.1 ATECO Company Information
  - 13.39.2 ATECO Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.39.3 ATECO Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.39.4 ATECO Main Business Overview
  - 13.39.5 ATECO Latest Developments
- 13.40 Innogrity Pte Ltd
  - 13.40.1 Innogrity Pte Ltd Company Information
  - 13.40.2 Innogrity Pte Ltd Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.40.3 Innogrity Pte Ltd Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.40.4 Innogrity Pte Ltd Main Business Overview
  - 13.40.5 Innogrity Pte Ltd Latest Developments
- 13.41 Fuzhou Palide
  - 13.41.1 Fuzhou Palide Company Information
  - 13.41.2 Fuzhou Palide Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.41.3 Fuzhou Palide Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.41.4 Fuzhou Palide Main Business Overview
- 13.41.5 Fuzhou Palide Latest Developments
- 13.42 Everbeing
  - 13.42.1 Everbeing Company Information
  - 13.42.2 Everbeing Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.42.3 Everbeing Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.42.4 Everbeing Main Business Overview
  - 13.42.5 Everbeing Latest Developments
- 13.43 MarTek (Electroglas)
  - 13.43.1 MarTek (Electroglas) Company Information
  - 13.43.2 MarTek (Electroglas) Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.43.3 MarTek (Electroglas) Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.43.4 MarTek (Electroglas) Main Business Overview
  - 13.43.5 MarTek (Electroglas) Latest Developments
- 13.44 Micromanipulator
  - 13.44.1 Micromanipulator Company Information
  - 13.44.2 Micromanipulator Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.44.3 Micromanipulator Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.44.4 Micromanipulator Main Business Overview
  - 13.44.5 Micromanipulator Latest Developments
- 13.45 Signatone
  - 13.45.1 Signatone Company Information
  - 13.45.2 Signatone Integrated Circuit Testing Equipment Product Portfolios and Specifications
  - 13.45.3 Signatone Integrated Circuit Testing Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.45.4 Signatone Main Business Overview
  - 13.45.5 Signatone Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

- Table 1. Integrated Circuit Testing Equipment Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Integrated Circuit Testing Equipment Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Semiconductor Testing Machine
- Table 4. Major Players of Test Handler
- Table 5. Major Players of Probe Station
- Table 6. Global Integrated Circuit Testing Equipment Sales by Type (2021-2026) & (Units)
- Table 7. Global Integrated Circuit Testing Equipment Sales Market Share by Type (2021-2026)
- Table 8. Global Integrated Circuit Testing Equipment Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Integrated Circuit Testing Equipment Revenue Market Share by Type (2021-2026)
- Table 10. Global Integrated Circuit Testing Equipment Sale Price by Type (2021-2026) & (K US\$/Unit)
- Table 11. Global Integrated Circuit Testing Equipment Sale by Application (2021-2026) & (Units)
- Table 12. Global Integrated Circuit Testing Equipment Sale Market Share by Application (2021-2026)
- Table 13. Global Integrated Circuit Testing Equipment Revenue by Application (2021-2026) & (\$ million)
- Table 14. Global Integrated Circuit Testing Equipment Revenue Market Share by Application (2021-2026)
- Table 15. Global Integrated Circuit Testing Equipment Sale Price by Application (2021-2026) & (K US\$/Unit)
- Table 16. Global Integrated Circuit Testing Equipment Sales by Company (2021-2026) & (Units)
- Table 17. Global Integrated Circuit Testing Equipment Sales Market Share by Company (2021-2026)
- Table 18. Global Integrated Circuit Testing Equipment Revenue by Company (2021-2026) & (\$ millions)
- Table 19. Global Integrated Circuit Testing Equipment Revenue Market Share by Company (2021-2026)

- Table 20. Global Integrated Circuit Testing Equipment Sale Price by Company (2021-2026) & (K US\$/Unit)
- Table 21. Key Manufacturers Integrated Circuit Testing Equipment Producing Area Distribution and Sales Area
- Table 22. Players Integrated Circuit Testing Equipment Products Offered
- Table 23. Integrated Circuit Testing Equipment Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- Table 24. New Products and Potential Entrants
- Table 25. Market M&A Activity & Strategy
- Table 26. Global Integrated Circuit Testing Equipment Sales by Geographic Region (2021-2026) & (Units)
- Table 27. Global Integrated Circuit Testing Equipment Sales Market Share Geographic Region (2021-2026)
- Table 28. Global Integrated Circuit Testing Equipment Revenue by Geographic Region (2021-2026) & (\$ millions)
- Table 29. Global Integrated Circuit Testing Equipment Revenue Market Share by Geographic Region (2021-2026)
- Table 30. Global Integrated Circuit Testing Equipment Sales by Country/Region (2021-2026) & (Units)
- Table 31. Global Integrated Circuit Testing Equipment Sales Market Share by Country/Region (2021-2026)
- Table 32. Global Integrated Circuit Testing Equipment Revenue by Country/Region (2021-2026) & (\$ millions)
- Table 33. Global Integrated Circuit Testing Equipment Revenue Market Share by Country/Region (2021-2026)
- Table 34. Americas Integrated Circuit Testing Equipment Sales by Country (2021-2026) & (Units)
- Table 35. Americas Integrated Circuit Testing Equipment Sales Market Share by Country (2021-2026)
- Table 36. Americas Integrated Circuit Testing Equipment Revenue by Country (2021-2026) & (\$ millions)
- Table 37. Americas Integrated Circuit Testing Equipment Sales by Type (2021-2026) & (Units)
- Table 38. Americas Integrated Circuit Testing Equipment Sales by Application (2021-2026) & (Units)
- Table 39. APAC Integrated Circuit Testing Equipment Sales by Region (2021-2026) & (Units)
- Table 40. APAC Integrated Circuit Testing Equipment Sales Market Share by Region (2021-2026)

- Table 41. APAC Integrated Circuit Testing Equipment Revenue by Region (2021-2026) & (\$ millions)
- Table 42. APAC Integrated Circuit Testing Equipment Sales by Type (2021-2026) & (Units)
- Table 43. APAC Integrated Circuit Testing Equipment Sales by Application (2021-2026) & (Units)
- Table 44. Europe Integrated Circuit Testing Equipment Sales by Country (2021-2026) & (Units)
- Table 45. Europe Integrated Circuit Testing Equipment Revenue by Country (2021-2026) & (\$ millions)
- Table 46. Europe Integrated Circuit Testing Equipment Sales by Type (2021-2026) & (Units)
- Table 47. Europe Integrated Circuit Testing Equipment Sales by Application (2021-2026) & (Units)
- Table 48. Middle East & Africa Integrated Circuit Testing Equipment Sales by Country (2021-2026) & (Units)
- Table 49. Middle East & Africa Integrated Circuit Testing Equipment Revenue Market Share by Country (2021-2026)
- Table 50. Middle East & Africa Integrated Circuit Testing Equipment Sales by Type (2021-2026) & (Units)
- Table 51. Middle East & Africa Integrated Circuit Testing Equipment Sales by Application (2021-2026) & (Units)
- Table 52. Key Market Drivers & Growth Opportunities of Integrated Circuit Testing Equipment
- Table 53. Key Market Challenges & Risks of Integrated Circuit Testing Equipment
- Table 54. Key Industry Trends of Integrated Circuit Testing Equipment
- Table 55. Integrated Circuit Testing Equipment Raw Material
- Table 56. Key Suppliers of Raw Materials
- Table 57. Integrated Circuit Testing Equipment Distributors List
- Table 58. Integrated Circuit Testing Equipment Customer List
- Table 59. Global Integrated Circuit Testing Equipment Sales Forecast by Region (2027-2032) & (Units)
- Table 60. Global Integrated Circuit Testing Equipment Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 61. Americas Integrated Circuit Testing Equipment Sales Forecast by Country (2027-2032) & (Units)
- Table 62. Americas Integrated Circuit Testing Equipment Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 63. APAC Integrated Circuit Testing Equipment Sales Forecast by Region

(2027-2032) & (Units)

Table 64. APAC Integrated Circuit Testing Equipment Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 65. Europe Integrated Circuit Testing Equipment Sales Forecast by Country (2027-2032) & (Units)

Table 66. Europe Integrated Circuit Testing Equipment Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 67. Middle East & Africa Integrated Circuit Testing Equipment Sales Forecast by Country (2027-2032) & (Units)

Table 68. Middle East & Africa Integrated Circuit Testing Equipment Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 69. Global Integrated Circuit Testing Equipment Sales Forecast by Type (2027-2032) & (Units)

Table 70. Global Integrated Circuit Testing Equipment Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 71. Global Integrated Circuit Testing Equipment Sales Forecast by Application (2027-2032) & (Units)

Table 72. Global Integrated Circuit Testing Equipment Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 73. Advantest Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 74. Advantest Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 75. Advantest Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 76. Advantest Main Business

Table 77. Advantest Latest Developments

Table 78. Teradyne Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 79. Teradyne Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 80. Teradyne Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 81. Teradyne Main Business

Table 82. Teradyne Latest Developments

Table 83. Cohu, Inc. (Incl. Xcerra & MCT) Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 84. Cohu, Inc. (Incl. Xcerra & MCT) Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 85. Cohu, Inc. (Incl. Xcerra & MCT) Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 86. Cohu, Inc. (Incl. Xcerra & MCT) Main Business

Table 87. Cohu, Inc. (Incl. Xcerra & MCT) Latest Developments

Table 88. Tokyo Seimitsu Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 89. Tokyo Seimitsu Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 90. Tokyo Seimitsu Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 91. Tokyo Seimitsu Main Business

Table 92. Tokyo Seimitsu Latest Developments

Table 93. Tokyo Electron Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 94. Tokyo Electron Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 95. Tokyo Electron Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 96. Tokyo Electron Main Business

Table 97. Tokyo Electron Latest Developments

Table 98. Changchuan Technology Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 99. Changchuan Technology Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 100. Changchuan Technology Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 101. Changchuan Technology Main Business

Table 102. Changchuan Technology Latest Developments

Table 103. Beijing Huafeng Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 104. Beijing Huafeng Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 105. Beijing Huafeng Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 106. Beijing Huafeng Main Business

Table 107. Beijing Huafeng Latest Developments

Table 108. Hon Precision Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 109. Hon Precision Integrated Circuit Testing Equipment Product Portfolios and

## Specifications

Table 110. Hon Precision Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 111. Hon Precision Main Business

Table 112. Hon Precision Latest Developments

Table 113. Semics Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 114. Semics Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 115. Semics Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 116. Semics Main Business

Table 117. Semics Latest Developments

Table 118. Tianjin JHT Design Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 119. Tianjin JHT Design Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 120. Tianjin JHT Design Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 121. Tianjin JHT Design Main Business

Table 122. Tianjin JHT Design Latest Developments

Table 123. Techwing Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 124. Techwing Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 125. Techwing Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 126. Techwing Main Business

Table 127. Techwing Latest Developments

Table 128. Fitech Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 129. Fitech Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 130. Fitech Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 131. Fitech Main Business

Table 132. Fitech Latest Developments

Table 133. ASM Pacific Technology Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 134. ASM Pacific Technology Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 135. ASM Pacific Technology Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 136. ASM Pacific Technology Main Business

Table 137. ASM Pacific Technology Latest Developments

Table 138. Chroma ATE Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 139. Chroma ATE Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 140. Chroma ATE Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 141. Chroma ATE Main Business

Table 142. Chroma ATE Latest Developments

Table 143. Shen Zhen Sidea Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 144. Shen Zhen Sidea Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 145. Shen Zhen Sidea Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 146. Shen Zhen Sidea Main Business

Table 147. Shen Zhen Sidea Latest Developments

Table 148. Exicon Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 149. Exicon Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 150. Exicon Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 151. Exicon Main Business

Table 152. Exicon Latest Developments

Table 153. Shenkeda Semiconductor Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 154. Shenkeda Semiconductor Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 155. Shenkeda Semiconductor Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 156. Shenkeda Semiconductor Main Business

Table 157. Shenkeda Semiconductor Latest Developments

Table 158. Boston Semi Equipment Basic Information, Integrated Circuit Testing

Equipment Manufacturing Base, Sales Area and Its Competitors

Table 159. Boston Semi Equipment Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 160. Boston Semi Equipment Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 161. Boston Semi Equipment Main Business

Table 162. Boston Semi Equipment Latest Developments

Table 163. Kanematsu (Epson) Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 164. Kanematsu (Epson) Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 165. Kanematsu (Epson) Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 166. Kanematsu (Epson) Main Business

Table 167. Kanematsu (Epson) Latest Developments

Table 168. EXIS TECH Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 169. EXIS TECH Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 170. EXIS TECH Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 171. EXIS TECH Main Business

Table 172. EXIS TECH Latest Developments

Table 173. MIRAE Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 174. MIRAE Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 175. MIRAE Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 176. MIRAE Main Business

Table 177. MIRAE Latest Developments

Table 178. SEMES Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 179. SEMES Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 180. SEMES Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 181. SEMES Main Business

Table 182. SEMES Latest Developments

Table 183. SRM Integration Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 184. SRM Integration Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 185. SRM Integration Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 186. SRM Integration Main Business

Table 187. SRM Integration Latest Developments

Table 188. FormFactor Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 189. FormFactor Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 190. FormFactor Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 191. FormFactor Main Business

Table 192. FormFactor Latest Developments

Table 193. ShibaSoku Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 194. ShibaSoku Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 195. ShibaSoku Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 196. ShibaSoku Main Business

Table 197. ShibaSoku Latest Developments

Table 198. Semishare Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 199. Semishare Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 200. Semishare Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 201. Semishare Main Business

Table 202. Semishare Latest Developments

Table 203. Shanghai Yingshuo Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 204. Shanghai Yingshuo Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 205. Shanghai Yingshuo Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 206. Shanghai Yingshuo Main Business

- Table 207. Shanghai Yingshuo Latest Developments
- Table 208. MPI Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 209. MPI Integrated Circuit Testing Equipment Product Portfolios and Specifications
- Table 210. MPI Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 211. MPI Main Business
- Table 212. MPI Latest Developments
- Table 213. Micronics Japan Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 214. Micronics Japan Integrated Circuit Testing Equipment Product Portfolios and Specifications
- Table 215. Micronics Japan Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 216. Micronics Japan Main Business
- Table 217. Micronics Japan Latest Developments
- Table 218. TESEC Corporation Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 219. TESEC Corporation Integrated Circuit Testing Equipment Product Portfolios and Specifications
- Table 220. TESEC Corporation Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 221. TESEC Corporation Main Business
- Table 222. TESEC Corporation Latest Developments
- Table 223. YoungTek Electronics Corp (YTEC) Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 224. YoungTek Electronics Corp (YTEC) Integrated Circuit Testing Equipment Product Portfolios and Specifications
- Table 225. YoungTek Electronics Corp (YTEC) Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 226. YoungTek Electronics Corp (YTEC) Main Business
- Table 227. YoungTek Electronics Corp (YTEC) Latest Developments
- Table 228. Ueno Seiki Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 229. Ueno Seiki Integrated Circuit Testing Equipment Product Portfolios and Specifications
- Table 230. Ueno Seiki Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 231. Ueno Seiki Main Business

Table 232. Ueno Seiki Latest Developments

Table 233. PowerTECH Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 234. PowerTECH Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 235. PowerTECH Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 236. PowerTECH Main Business

Table 237. PowerTECH Latest Developments

Table 238. JT Corp Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 239. JT Corp Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 240. JT Corp Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 241. JT Corp Main Business

Table 242. JT Corp Latest Developments

Table 243. SYNAX Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 244. SYNAX Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 245. SYNAX Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 246. SYNAX Main Business

Table 247. SYNAX Latest Developments

Table 248. Genesem Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 249. Genesem Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 250. Genesem Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 251. Genesem Main Business

Table 252. Genesem Latest Developments

Table 253. Pentamaster Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 254. Pentamaster Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 255. Pentamaster Integrated Circuit Testing Equipment Sales (Units), Revenue (\$

Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 256. Pentamaster Main Business

Table 257. Pentamaster Latest Developments

Table 258. Lake Shore Cryotronics Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 259. Lake Shore Cryotronics Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 260. Lake Shore Cryotronics Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 261. Lake Shore Cryotronics Main Business

Table 262. Lake Shore Cryotronics Latest Developments

Table 263. ATECO Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 264. ATECO Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 265. ATECO Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 266. ATECO Main Business

Table 267. ATECO Latest Developments

Table 268. Innogrity Pte Ltd Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 269. Innogrity Pte Ltd Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 270. Innogrity Pte Ltd Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 271. Innogrity Pte Ltd Main Business

Table 272. Innogrity Pte Ltd Latest Developments

Table 273. Fuzhou Palide Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 274. Fuzhou Palide Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 275. Fuzhou Palide Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 276. Fuzhou Palide Main Business

Table 277. Fuzhou Palide Latest Developments

Table 278. Everbeing Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 279. Everbeing Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 280. Everbeing Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 281. Everbeing Main Business

Table 282. Everbeing Latest Developments

Table 283. MarTek (Electroglas) Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 284. MarTek (Electroglas) Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 285. MarTek (Electroglas) Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 286. MarTek (Electroglas) Main Business

Table 287. MarTek (Electroglas) Latest Developments

Table 288. Micromanipulator Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 289. Micromanipulator Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 290. Micromanipulator Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 291. Micromanipulator Main Business

Table 292. Micromanipulator Latest Developments

Table 293. Signatone Basic Information, Integrated Circuit Testing Equipment Manufacturing Base, Sales Area and Its Competitors

Table 294. Signatone Integrated Circuit Testing Equipment Product Portfolios and Specifications

Table 295. Signatone Integrated Circuit Testing Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 296. Signatone Main Business

Table 297. Signatone Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Integrated Circuit Testing Equipment
- Figure 2. Integrated Circuit Testing Equipment Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Integrated Circuit Testing Equipment Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Integrated Circuit Testing Equipment Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Integrated Circuit Testing Equipment Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Integrated Circuit Testing Equipment Sales Market Share by Country/Region (2025)
- Figure 10. Integrated Circuit Testing Equipment Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Semiconductor Testing Machine
- Figure 12. Product Picture of Test Handler
- Figure 13. Product Picture of Probe Station
- Figure 14. Global Integrated Circuit Testing Equipment Sales Market Share by Type in 2026
- Figure 15. Global Integrated Circuit Testing Equipment Revenue Market Share by Type (2021-2026)
- Figure 16. Integrated Circuit Testing Equipment Consumed in IDMs
- Figure 17. Global Integrated Circuit Testing Equipment Market: IDMs (2021-2026) & (Units)
- Figure 18. Integrated Circuit Testing Equipment Consumed in OSATs
- Figure 19. Global Integrated Circuit Testing Equipment Market: OSATs (2021-2026) & (Units)
- Figure 20. Integrated Circuit Testing Equipment Consumed in Other (Foundry, Research Institutes, etc.)
- Figure 21. Global Integrated Circuit Testing Equipment Market: Other (Foundry, Research Institutes, etc.) (2021-2026) & (Units)
- Figure 22. Global Integrated Circuit Testing Equipment Sale Market Share by Application (2025)
- Figure 23. Global Integrated Circuit Testing Equipment Revenue Market Share by

Application in 2026

Figure 24. Integrated Circuit Testing Equipment Sales by Company in 2026 (Units)

Figure 25. Global Integrated Circuit Testing Equipment Sales Market Share by Company in 2026

Figure 26. Integrated Circuit Testing Equipment Revenue by Company in 2026 (\$ millions)

Figure 27. Global Integrated Circuit Testing Equipment Revenue Market Share by Company in 2026

Figure 28. Global Integrated Circuit Testing Equipment Sales Market Share by Geographic Region (2021-2026)

Figure 29. Global Integrated Circuit Testing Equipment Revenue Market Share by Geographic Region in 2026

Figure 30. Americas Integrated Circuit Testing Equipment Sales 2021-2026 (Units)

Figure 31. Americas Integrated Circuit Testing Equipment Revenue 2021-2026 (\$ millions)

Figure 32. APAC Integrated Circuit Testing Equipment Sales 2021-2026 (Units)

Figure 33. APAC Integrated Circuit Testing Equipment Revenue 2021-2026 (\$ millions)

Figure 34. Europe Integrated Circuit Testing Equipment Sales 2021-2026 (Units)

Figure 35. Europe Integrated Circuit Testing Equipment Revenue 2021-2026 (\$ millions)

Figure 36. Middle East & Africa Integrated Circuit Testing Equipment Sales 2021-2026 (Units)

Figure 37. Middle East & Africa Integrated Circuit Testing Equipment Revenue 2021-2026 (\$ millions)

Figure 38. Americas Integrated Circuit Testing Equipment Sales Market Share by Country in 2026

Figure 39. Americas Integrated Circuit Testing Equipment Revenue Market Share by Country (2021-2026)

Figure 40. Americas Integrated Circuit Testing Equipment Sales Market Share by Type (2021-2026)

Figure 41. Americas Integrated Circuit Testing Equipment Sales Market Share by Application (2021-2026)

Figure 42. United States Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 43. Canada Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 44. Mexico Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 45. Brazil Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 46. APAC Integrated Circuit Testing Equipment Sales Market Share by Region in 2026

Figure 47. APAC Integrated Circuit Testing Equipment Revenue Market Share by Region (2021-2026)

Figure 48. APAC Integrated Circuit Testing Equipment Sales Market Share by Type (2021-2026)

Figure 49. APAC Integrated Circuit Testing Equipment Sales Market Share by Application (2021-2026)

Figure 50. China Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 51. Japan Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 52. South Korea Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 53. Southeast Asia Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 54. India Integrated Circuit Testing Equipment Revenue Growth 2021-2026 (\$ millions)

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