

# Global MEMS Probe Cards for Storage Market Growth 2026-2032

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## Abstracts

The global MEMS Probe Cards for Storage market size is predicted to grow from US\$ 616 million in 2025 to US\$ 1100 million in 2032; it is expected to grow at a CAGR of 8.2% from 2026 to 2032.

Global sales of MEMS probe cards for storage reached 70 million units in 2025, with an average selling price of approximately \$9 per unit. With a production capacity of 100 million units, the industry's gross profit margin is approximately 40-60%.

MEMS probe cards for storage are precision test interfaces specifically designed for high-density memory chips (such as HBM, DRAM, and NAND Flash), manufactured using Micro-Electro-Mechanical Systems (MEMS) technology. Their core functionality involves direct contact between a micron-level probe array and the chip surface pads or bumps, enabling high-precision transmission of electrical signals. This supports parameter detection and functional verification of memory chips during the wafer testing phase, making them a key consumable for ensuring memory chip yield and reliability. The upstream sector encompasses MEMS probe manufacturing materials (such as silicon-based wafers and special metals), high-precision PCB substrates, and spatial transfer modules; the midstream involves probe card R&D and manufacturing, requiring the integration of micro/nano fabrication, signal simulation, and mechanical structure optimization technologies; and the downstream sector is applied in memory chip design, wafer manufacturing, and packaging testing, with customers including memory giants such as Samsung, SK Hynix, and Yangtze Memory Technologies.

Market drivers primarily include the following:

Technological upgrades drive demand growth.

Continuous advancements in semiconductor technology are the core driving force behind the development of the MEMS probe card market for memory applications. While Moore's Law is gradually approaching its limits, process technology continues to evolve towards smaller sizes. The 'post-Moore's Law era' of SoC and SiP technologies has made semiconductor product structures increasingly complex, significantly increasing packaging costs. This trend places stringent demands on wafer testing, prompting probe cards to iterate towards higher precision and more complex structures. As a crucial component of the semiconductor industry, the miniaturization and increased integration of memory chips directly drive the demand for high-precision, high-reliability MEMS probe cards. For example, in the manufacturing of 3D NAND memory chips, multi-layer stacked structures require probe cards to achieve denser test point connections while ensuring signal transmission stability to adapt to high-frequency, high-speed testing scenarios. Furthermore, the increasing demands on storage performance from emerging fields such as AI chips and 5G communication chips further promote the technological upgrade and market expansion of MEMS probe cards for memory applications.

### Domestic Substitution Policies Accelerate Market Penetration

Driven by both changes in the international political environment and domestic industrial security needs, the Chinese government has introduced a series of policies to support the development of the semiconductor industry, providing strong impetus for the domestic substitution of MEMS probe cards for storage. From the 'Guidance Catalogue for Industrial Structure Adjustment' to the 'Action Plan for Stabilizing Growth in the Electronic Information Manufacturing Industry,' and the planning document listing integrated circuits as a strategic emerging industry, policies comprehensively cover key aspects such as technology research and development, industrial layout, and financial support. These policies not only reduce the R&D costs and market entry barriers for domestic enterprises but also encourage enterprises to increase investment and accelerate technological breakthroughs through tax incentives and subsidies. Against this backdrop, domestic MEMS probe card companies are gradually narrowing the gap with international giants, achieving significant improvements in product quality, performance stability, and delivery capabilities. For example, some domestic companies have achieved the capability to process micro-needles below 5 $\mu$ m and have achieved large-scale applications in logic chips, memory chips, and other fields, gradually breaking the market monopoly of foreign manufacturers and accelerating the process of domestic substitution.

## Packaging Technology Revolution and Emerging Applications Expand Demand Boundaries

The popularization of advanced packaging technologies and the emergence of new application scenarios have opened up new growth space for the MEMS probe card market for storage. The rise of 3D ICs and Chiplet packaging has placed demands on probe cards for high-density layouts, high pin counts, and high signal integrity. For example, in the Chiplet architecture, the number of test points per chip has increased dramatically, requiring probe cards to achieve finer pin pitch control and more stable signal transmission to meet the testing needs of heterogeneous integration scenarios. Simultaneously, the trend towards intelligent and electric vehicles has led to a significant increase in demand for automotive-grade memory chips. The AEC-Q100 certification standard requires probe cards to possess high reliability, high temperature resistance, and vibration resistance to adapt to the complex automotive environment. Furthermore, the testing requirements of high-end memory products such as HBM (High Bandwidth Memory) are also driving the evolution of probe cards towards higher frequencies, higher speeds, and lower losses. The convergence of these technological changes and emerging application scenarios has not only expanded the market boundaries of MEMS probe cards for storage but also provided a clear direction for their technological upgrades and product iterations.

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

This Insight Report provides a comprehensive analysis of the global MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global MEMS Probe Cards for Storage market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage.

This report presents a comprehensive overview, market shares, and growth opportunities of MEMS Probe Cards for Storage market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

2D

2.5D/3D

#### Segmentation by Function Category:

High-Speed ??Signal Test Card

Low Temperature Test Card

Multi-Chip Parallel Test Card

#### Segmentation by Product Form:

Standard Model

Customized Model

#### Segmentation by Application:

HBM

NOR Flash

DRAM

NAND Flash

Others

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)

JEM

MPI Corporation

Qiangyi Shares

SV Probe

Microfriend

Korea Instrument

Will Technology

TSE

Feinmetall

Changhong International

Microneedle Semiconductor

Zefeng Semiconductor

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global MEMS Probe Cards for Storage market?

What factors are driving MEMS Probe Cards for Storage market growth, globally and by region?

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

How do MEMS Probe Cards for Storage market opportunities vary by end market size?

How does MEMS Probe Cards for Storage break out by Type, by Application?

## 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 MEMS Probe Cards for Storage Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for MEMS Probe Cards for Storage by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for MEMS Probe Cards for Storage by Country/Region, 2021, 2025 & 2032
- 2.2 MEMS Probe Cards for Storage Segment by Type
  - 2.2.1 2D
  - 2.2.2 2.5D/3D
  - 2.2.3 MEMS Probe Cards for Storage Sales by Type
    - 2.2.3.1 Global MEMS Probe Cards for Storage Sales Market Share by Type (2021-2026)
    - 2.2.3.2 Global MEMS Probe Cards for Storage Revenue and Market Share by Type (2021-2026)
    - 2.2.3.3 Global MEMS Probe Cards for Storage Sale Price by Type (2021-2026)
- 2.3 MEMS Probe Cards for Storage Segment by Function Category
  - 2.3.1 High-Speed ??Signal Test Card
  - 2.3.2 Low Temperature Test Card
  - 2.3.3 Multi-Chip Parallel Test Card
  - 2.3.4 MEMS Probe Cards for Storage Sales by Function Category
    - 2.3.4.1 Global MEMS Probe Cards for Storage Sales Market Share by Function Category (2021-2026)
    - 2.3.4.2 Global MEMS Probe Cards for Storage Revenue and Market Share by Function Category (2021-2026)

2.3.4.3 Global MEMS Probe Cards for Storage Sale Price by Function Category  
(2021-2026)

2.4 MEMS Probe Cards for Storage Segment by Product Form

2.4.1 Standard Model

2.4.2 Customized Model

2.4.3 MEMS Probe Cards for Storage Sales by Product Form

2.4.3.1 Global MEMS Probe Cards for Storage Sales Market Share by Product Form  
(2021-2026)

2.4.3.2 Global MEMS Probe Cards for Storage Revenue and Market Share by  
Product Form (2021-2026)

2.4.3.3 Global MEMS Probe Cards for Storage Sale Price by Product Form  
(2021-2026)

2.5 MEMS Probe Cards for Storage Segment by Application

2.5.1 HBM

2.5.2 NOR Flash

2.5.3 DRAM

2.5.4 NAND Flash

2.5.5 Others

2.5.6 MEMS Probe Cards for Storage Sales by Application

2.5.6.1 Global MEMS Probe Cards for Storage Sale Market Share by Application  
(2021-2026)

2.5.6.2 Global MEMS Probe Cards for Storage Revenue and Market Share by  
Application (2021-2026)

2.5.6.3 Global MEMS Probe Cards for Storage Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global MEMS Probe Cards for Storage Breakdown Data by Company

3.1.1 Global MEMS Probe Cards for Storage Annual Sales by Company (2021-2026)

3.1.2 Global MEMS Probe Cards for Storage Sales Market Share by Company  
(2021-2026)

3.2 Global MEMS Probe Cards for Storage Annual Revenue by Company (2021-2026)

3.2.1 Global MEMS Probe Cards for Storage Revenue by Company (2021-2026)

3.2.2 Global MEMS Probe Cards for Storage Revenue Market Share by Company  
(2021-2026)

3.3 Global MEMS Probe Cards for Storage Sale Price by Company

3.4 Key Manufacturers MEMS Probe Cards for Storage Producing Area Distribution,  
Sales Area, Product Type

3.4.1 Key Manufacturers MEMS Probe Cards for Storage Product Location Distribution

- 3.4.2 Players MEMS Probe Cards for Storage 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 MEMS PROBE CARDS FOR STORAGE BY GEOGRAPHIC REGION**

- 4.1 World Historic MEMS Probe Cards for Storage Market Size by Geographic Region (2021-2026)
  - 4.1.1 Global MEMS Probe Cards for Storage Annual Sales by Geographic Region (2021-2026)
  - 4.1.2 Global MEMS Probe Cards for Storage Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic MEMS Probe Cards for Storage Market Size by Country/Region (2021-2026)
  - 4.2.1 Global MEMS Probe Cards for Storage Annual Sales by Country/Region (2021-2026)
  - 4.2.2 Global MEMS Probe Cards for Storage Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas MEMS Probe Cards for Storage Sales Growth
- 4.4 APAC MEMS Probe Cards for Storage Sales Growth
- 4.5 Europe MEMS Probe Cards for Storage Sales Growth
- 4.6 Middle East & Africa MEMS Probe Cards for Storage Sales Growth

## **5 AMERICAS**

- 5.1 Americas MEMS Probe Cards for Storage Sales by Country
  - 5.1.1 Americas MEMS Probe Cards for Storage Sales by Country (2021-2026)
  - 5.1.2 Americas MEMS Probe Cards for Storage Revenue by Country (2021-2026)
- 5.2 Americas MEMS Probe Cards for Storage Sales by Type (2021-2026)
- 5.3 Americas MEMS Probe Cards for Storage Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

### 6.1 APAC MEMS Probe Cards for Storage Sales by Region

6.1.1 APAC MEMS Probe Cards for Storage Sales by Region (2021-2026)

6.1.2 APAC MEMS Probe Cards for Storage Revenue by Region (2021-2026)

### 6.2 APAC MEMS Probe Cards for Storage Sales by Type (2021-2026)

### 6.3 APAC MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage by Country

7.1.1 Europe MEMS Probe Cards for Storage Sales by Country (2021-2026)

7.1.2 Europe MEMS Probe Cards for Storage Revenue by Country (2021-2026)

### 7.2 Europe MEMS Probe Cards for Storage Sales by Type (2021-2026)

### 7.3 Europe MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage by Country

8.1.1 Middle East & Africa MEMS Probe Cards for Storage Sales by Country (2021-2026)

8.1.2 Middle East & Africa MEMS Probe Cards for Storage Revenue by Country (2021-2026)

### 8.2 Middle East & Africa MEMS Probe Cards for Storage Sales by Type (2021-2026)

8.3 Middle East & Africa MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage

10.3 Manufacturing Process Analysis of MEMS Probe Cards for Storage

10.4 Industry Chain Structure of MEMS Probe Cards for Storage

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

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 MEMS Probe Cards for Storage Distributors

11.3 MEMS Probe Cards for Storage Customer

## **12 WORLD FORECAST REVIEW FOR MEMS PROBE CARDS FOR STORAGE BY GEOGRAPHIC REGION**

12.1 Global MEMS Probe Cards for Storage Market Size Forecast by Region

12.1.1 Global MEMS Probe Cards for Storage Forecast by Region (2027-2032)

12.1.2 Global MEMS Probe Cards for Storage 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 MEMS Probe Cards for Storage Forecast by Type (2027-2032)

12.7 Global MEMS Probe Cards for Storage Forecast by Application (2027-2032)

## 13 KEY PLAYERS ANALYSIS

### 13.1 FormFactor

13.1.1 FormFactor Company Information

13.1.2 FormFactor MEMS Probe Cards for Storage Product Portfolios and Specifications

13.1.3 FormFactor MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 FormFactor Main Business Overview

13.1.5 FormFactor Latest Developments

### 13.2 Technoprobe S.p.A.

13.2.1 Technoprobe S.p.A. Company Information

13.2.2 Technoprobe S.p.A. MEMS Probe Cards for Storage Product Portfolios and Specifications

13.2.3 Technoprobe S.p.A. MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Technoprobe S.p.A. Main Business Overview

13.2.5 Technoprobe S.p.A. Latest Developments

### 13.3 Micronics Japan (MJC)

13.3.1 Micronics Japan (MJC) Company Information

13.3.2 Micronics Japan (MJC) MEMS Probe Cards for Storage Product Portfolios and Specifications

13.3.3 Micronics Japan (MJC) MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Micronics Japan (MJC) Main Business Overview

13.3.5 Micronics Japan (MJC) Latest Developments

### 13.4 JEM

13.4.1 JEM Company Information

13.4.2 JEM MEMS Probe Cards for Storage Product Portfolios and Specifications

13.4.3 JEM MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 JEM Main Business Overview

13.4.5 JEM Latest Developments

### 13.5 MPI Corporation

13.5.1 MPI Corporation Company Information

13.5.2 MPI Corporation MEMS Probe Cards for Storage Product Portfolios and Specifications

13.5.3 MPI Corporation MEMS Probe Cards for Storage Sales, Revenue, Price and

## Gross Margin (2021-2026)

13.5.4 MPI Corporation Main Business Overview

13.5.5 MPI Corporation Latest Developments

## 13.6 Qiangyi Shares

13.6.1 Qiangyi Shares Company Information

13.6.2 Qiangyi Shares MEMS Probe Cards for Storage Product Portfolios and Specifications

13.6.3 Qiangyi Shares MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Qiangyi Shares Main Business Overview

13.6.5 Qiangyi Shares Latest Developments

## 13.7 SV Probe

13.7.1 SV Probe Company Information

13.7.2 SV Probe MEMS Probe Cards for Storage Product Portfolios and Specifications

13.7.3 SV Probe MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 SV Probe Main Business Overview

13.7.5 SV Probe Latest Developments

## 13.8 Microfriend

13.8.1 Microfriend Company Information

13.8.2 Microfriend MEMS Probe Cards for Storage Product Portfolios and Specifications

13.8.3 Microfriend MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Microfriend Main Business Overview

13.8.5 Microfriend Latest Developments

## 13.9 Korea Instrument

13.9.1 Korea Instrument Company Information

13.9.2 Korea Instrument MEMS Probe Cards for Storage Product Portfolios and Specifications

13.9.3 Korea Instrument MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Korea Instrument Main Business Overview

13.9.5 Korea Instrument Latest Developments

## 13.10 Will Technology

13.10.1 Will Technology Company Information

13.10.2 Will Technology MEMS Probe Cards for Storage Product Portfolios and Specifications

13.10.3 Will Technology MEMS Probe Cards for Storage Sales, Revenue, Price and

## Gross Margin (2021-2026)

13.10.4 Will Technology Main Business Overview

13.10.5 Will Technology Latest Developments

## 13.11 TSE

13.11.1 TSE Company Information

13.11.2 TSE MEMS Probe Cards for Storage Product Portfolios and Specifications

13.11.3 TSE MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 TSE Main Business Overview

13.11.5 TSE Latest Developments

## 13.12 Feinmetall

13.12.1 Feinmetall Company Information

13.12.2 Feinmetall MEMS Probe Cards for Storage Product Portfolios and Specifications

13.12.3 Feinmetall MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Feinmetall Main Business Overview

13.12.5 Feinmetall Latest Developments

## 13.13 Changhong International

13.13.1 Changhong International Company Information

13.13.2 Changhong International MEMS Probe Cards for Storage Product Portfolios and Specifications

13.13.3 Changhong International MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Changhong International Main Business Overview

13.13.5 Changhong International Latest Developments

## 13.14 Microneedle Semiconductor

13.14.1 Microneedle Semiconductor Company Information

13.14.2 Microneedle Semiconductor MEMS Probe Cards for Storage Product Portfolios and Specifications

13.14.3 Microneedle Semiconductor MEMS Probe Cards for Storage Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Microneedle Semiconductor Main Business Overview

13.14.5 Microneedle Semiconductor Latest Developments

## 13.15 Zefeng Semiconductor

13.15.1 Zefeng Semiconductor Company Information

13.15.2 Zefeng Semiconductor MEMS Probe Cards for Storage Product Portfolios and Specifications

13.15.3 Zefeng Semiconductor MEMS Probe Cards for Storage Sales, Revenue, Price

and Gross Margin (2021-2026)

13.15.4 Zefeng Semiconductor Main Business Overview

13.15.5 Zefeng Semiconductor Latest Developments

## **14 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. MEMS Probe Cards for Storage Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. MEMS Probe Cards for Storage Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of 2D

Table 4. Major Players of 2.5D/3D

Table 5. Global MEMS Probe Cards for Storage Sales by Type (2021-2026) & (K Units)

Table 6. Global MEMS Probe Cards for Storage Sales Market Share by Type (2021-2026)

Table 7. Global MEMS Probe Cards for Storage Revenue by Type (2021-2026) & (\$ million)

Table 8. Global MEMS Probe Cards for Storage Revenue Market Share by Type (2021-2026)

Table 9. Global MEMS Probe Cards for Storage Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of High-Speed ??Signal Test Card

Table 11. Major Players of Low Temperature Test Card

Table 12. Major Players of Multi-Chip Parallel Test Card

Table 13. Global MEMS Probe Cards for Storage Sales by Function Category (2021-2026) & (K Units)

Table 14. Global MEMS Probe Cards for Storage Sales Market Share by Function Category (2021-2026)

Table 15. Global MEMS Probe Cards for Storage Revenue by Function Category (2021-2026) & (\$ million)

Table 16. Global MEMS Probe Cards for Storage Revenue Market Share by Function Category (2021-2026)

Table 17. Global MEMS Probe Cards for Storage Sale Price by Function Category (2021-2026) & (US\$/Unit)

Table 18. Major Players of Standard Model

Table 19. Major Players of Customized Model

Table 20. Global MEMS Probe Cards for Storage Sales by Product Form (2021-2026) & (K Units)

Table 21. Global MEMS Probe Cards for Storage Sales Market Share by Product Form (2021-2026)

Table 22. Global MEMS Probe Cards for Storage Revenue by Product Form

(2021-2026) & (\$ million)

Table 23. Global MEMS Probe Cards for Storage Revenue Market Share by Product Form (2021-2026)

Table 24. Global MEMS Probe Cards for Storage Sale Price by Product Form (2021-2026) & (US\$/Unit)

Table 25. Global MEMS Probe Cards for Storage Sale by Application (2021-2026) & (K Units)

Table 26. Global MEMS Probe Cards for Storage Sale Market Share by Application (2021-2026)

Table 27. Global MEMS Probe Cards for Storage Revenue by Application (2021-2026) & (\$ million)

Table 28. Global MEMS Probe Cards for Storage Revenue Market Share by Application (2021-2026)

Table 29. Global MEMS Probe Cards for Storage Sale Price by Application (2021-2026) & (US\$/Unit)

Table 30. Global MEMS Probe Cards for Storage Sales by Company (2021-2026) & (K Units)

Table 31. Global MEMS Probe Cards for Storage Sales Market Share by Company (2021-2026)

Table 32. Global MEMS Probe Cards for Storage Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global MEMS Probe Cards for Storage Revenue Market Share by Company (2021-2026)

Table 34. Global MEMS Probe Cards for Storage Sale Price by Company (2021-2026) & (US\$/Unit)

Table 35. Key Manufacturers MEMS Probe Cards for Storage Producing Area Distribution and Sales Area

Table 36. Players MEMS Probe Cards for Storage Products Offered

Table 37. MEMS Probe Cards for Storage Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Market M&A Activity & Strategy

Table 40. Global MEMS Probe Cards for Storage Sales by Geographic Region (2021-2026) & (K Units)

Table 41. Global MEMS Probe Cards for Storage Sales Market Share Geographic Region (2021-2026)

Table 42. Global MEMS Probe Cards for Storage Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 43. Global MEMS Probe Cards for Storage Revenue Market Share by

Geographic Region (2021-2026)

Table 44. Global MEMS Probe Cards for Storage Sales by Country/Region (2021-2026) & (K Units)

Table 45. Global MEMS Probe Cards for Storage Sales Market Share by Country/Region (2021-2026)

Table 46. Global MEMS Probe Cards for Storage Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global MEMS Probe Cards for Storage Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas MEMS Probe Cards for Storage Sales by Country (2021-2026) & (K Units)

Table 49. Americas MEMS Probe Cards for Storage Sales Market Share by Country (2021-2026)

Table 50. Americas MEMS Probe Cards for Storage Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas MEMS Probe Cards for Storage Sales by Type (2021-2026) & (K Units)

Table 52. Americas MEMS Probe Cards for Storage Sales by Application (2021-2026) & (K Units)

Table 53. APAC MEMS Probe Cards for Storage Sales by Region (2021-2026) & (K Units)

Table 54. APAC MEMS Probe Cards for Storage Sales Market Share by Region (2021-2026)

Table 55. APAC MEMS Probe Cards for Storage Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC MEMS Probe Cards for Storage Sales by Type (2021-2026) & (K Units)

Table 57. APAC MEMS Probe Cards for Storage Sales by Application (2021-2026) & (K Units)

Table 58. Europe MEMS Probe Cards for Storage Sales by Country (2021-2026) & (K Units)

Table 59. Europe MEMS Probe Cards for Storage Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe MEMS Probe Cards for Storage Sales by Type (2021-2026) & (K Units)

Table 61. Europe MEMS Probe Cards for Storage Sales by Application (2021-2026) & (K Units)

Table 62. Middle East & Africa MEMS Probe Cards for Storage Sales by Country (2021-2026) & (K Units)

Table 63. Middle East & Africa MEMS Probe Cards for Storage Revenue Market Share by Country (2021-2026)

Table 64. Middle East & Africa MEMS Probe Cards for Storage Sales by Type (2021-2026) & (K Units)

Table 65. Middle East & Africa MEMS Probe Cards for Storage Sales by Application (2021-2026) & (K Units)

Table 66. Key Market Drivers & Growth Opportunities of MEMS Probe Cards for Storage

Table 67. Key Market Challenges & Risks of MEMS Probe Cards for Storage

Table 68. Key Industry Trends of MEMS Probe Cards for Storage

Table 69. MEMS Probe Cards for Storage Raw Material

Table 70. Key Suppliers of Raw Materials

Table 71. MEMS Probe Cards for Storage Distributors List

Table 72. MEMS Probe Cards for Storage Customer List

Table 73. Global MEMS Probe Cards for Storage Sales Forecast by Region (2027-2032) & (K Units)

Table 74. Global MEMS Probe Cards for Storage Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Americas MEMS Probe Cards for Storage Sales Forecast by Country (2027-2032) & (K Units)

Table 76. Americas MEMS Probe Cards for Storage Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. APAC MEMS Probe Cards for Storage Sales Forecast by Region (2027-2032) & (K Units)

Table 78. APAC MEMS Probe Cards for Storage Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Europe MEMS Probe Cards for Storage Sales Forecast by Country (2027-2032) & (K Units)

Table 80. Europe MEMS Probe Cards for Storage Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. Middle East & Africa MEMS Probe Cards for Storage Sales Forecast by Country (2027-2032) & (K Units)

Table 82. Middle East & Africa MEMS Probe Cards for Storage Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Global MEMS Probe Cards for Storage Sales Forecast by Type (2027-2032) & (K Units)

Table 84. Global MEMS Probe Cards for Storage Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 85. Global MEMS Probe Cards for Storage Sales Forecast by Application

(2027-2032) & (K Units)

Table 86. Global MEMS Probe Cards for Storage Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. FormFactor Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 88. FormFactor MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 89. FormFactor MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 90. FormFactor Main Business

Table 91. FormFactor Latest Developments

Table 92. Technoprobe S.p.A. Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 93. Technoprobe S.p.A. MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 94. Technoprobe S.p.A. MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 95. Technoprobe S.p.A. Main Business

Table 96. Technoprobe S.p.A. Latest Developments

Table 97. Micronics Japan (MJC) Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 98. Micronics Japan (MJC) MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 99. Micronics Japan (MJC) MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 100. Micronics Japan (MJC) Main Business

Table 101. Micronics Japan (MJC) Latest Developments

Table 102. JEM Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 103. JEM MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 104. JEM MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. JEM Main Business

Table 106. JEM Latest Developments

Table 107. MPI Corporation Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 108. MPI Corporation MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 109. MPI Corporation MEMS Probe Cards for Storage Sales (K Units), Revenue

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

Table 110. MPI Corporation Main Business

Table 111. MPI Corporation Latest Developments

Table 112. Qiangyi Shares Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 113. Qiangyi Shares MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 114. Qiangyi Shares MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. Qiangyi Shares Main Business

Table 116. Qiangyi Shares Latest Developments

Table 117. SV Probe Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 118. SV Probe MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 119. SV Probe MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. SV Probe Main Business

Table 121. SV Probe Latest Developments

Table 122. Microfriend Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 123. Microfriend MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 124. Microfriend MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. Microfriend Main Business

Table 126. Microfriend Latest Developments

Table 127. Korea Instrument Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 128. Korea Instrument MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 129. Korea Instrument MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. Korea Instrument Main Business

Table 131. Korea Instrument Latest Developments

Table 132. Will Technology Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 133. Will Technology MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 134. Will Technology MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Will Technology Main Business

Table 136. Will Technology Latest Developments

Table 137. TSE Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 138. TSE MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 139. TSE MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. TSE Main Business

Table 141. TSE Latest Developments

Table 142. Feinmetall Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 143. Feinmetall MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 144. Feinmetall MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 145. Feinmetall Main Business

Table 146. Feinmetall Latest Developments

Table 147. Changhong International Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 148. Changhong International MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 149. Changhong International MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Changhong International Main Business

Table 151. Changhong International Latest Developments

Table 152. Microneedle Semiconductor Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 153. Microneedle Semiconductor MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 154. Microneedle Semiconductor MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Microneedle Semiconductor Main Business

Table 156. Microneedle Semiconductor Latest Developments

Table 157. Zefeng Semiconductor Basic Information, MEMS Probe Cards for Storage Manufacturing Base, Sales Area and Its Competitors

Table 158. Zefeng Semiconductor MEMS Probe Cards for Storage Product Portfolios and Specifications

Table 159. Zefeng Semiconductor MEMS Probe Cards for Storage Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Zefeng Semiconductor Main Business

Table 161. Zefeng Semiconductor Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of MEMS Probe Cards for Storage
- Figure 2. MEMS Probe Cards for Storage Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global MEMS Probe Cards for Storage Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global MEMS Probe Cards for Storage Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. MEMS Probe Cards for Storage Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. MEMS Probe Cards for Storage Sales Market Share by Country/Region (2025)
- Figure 10. MEMS Probe Cards for Storage Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of 2D
- Figure 12. Product Picture of 2.5D/3D
- Figure 13. Global MEMS Probe Cards for Storage Sales Market Share by Type in 2026
- Figure 14. Global MEMS Probe Cards for Storage Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of High-Speed ??Signal Test Card
- Figure 16. Product Picture of Low Temperature Test Card
- Figure 17. Product Picture of Multi-Chip Parallel Test Card
- Figure 18. Global MEMS Probe Cards for Storage Sales Market Share by Function Category in 2026
- Figure 19. Global MEMS Probe Cards for Storage Revenue Market Share by Function Category (2021-2026)
- Figure 20. Product Picture of Standard Model
- Figure 21. Product Picture of Customized Model
- Figure 22. Global MEMS Probe Cards for Storage Sales Market Share by Product Form in 2026
- Figure 23. Global MEMS Probe Cards for Storage Revenue Market Share by Product Form (2021-2026)
- Figure 24. MEMS Probe Cards for Storage Consumed in HBM
- Figure 25. Global MEMS Probe Cards for Storage Market: HBM (2021-2026) & (K

Units)

Figure 26. MEMS Probe Cards for Storage Consumed in NOR Flash

Figure 27. Global MEMS Probe Cards for Storage Market: NOR Flash (2021-2026) & (K Units)

Figure 28. MEMS Probe Cards for Storage Consumed in DRAM

Figure 29. Global MEMS Probe Cards for Storage Market: DRAM (2021-2026) & (K Units)

Figure 30. MEMS Probe Cards for Storage Consumed in NAND Flash

Figure 31. Global MEMS Probe Cards for Storage Market: NAND Flash (2021-2026) & (K Units)

Figure 32. MEMS Probe Cards for Storage Consumed in Others

Figure 33. Global MEMS Probe Cards for Storage Market: Others (2021-2026) & (K Units)

Figure 34. Global MEMS Probe Cards for Storage Sale Market Share by Application (2025)

Figure 35. Global MEMS Probe Cards for Storage Revenue Market Share by Application in 2026

Figure 36. MEMS Probe Cards for Storage Sales by Company in 2026 (K Units)

Figure 37. Global MEMS Probe Cards for Storage Sales Market Share by Company in 2026

Figure 38. MEMS Probe Cards for Storage Revenue by Company in 2026 (\$ millions)

Figure 39. Global MEMS Probe Cards for Storage Revenue Market Share by Company in 2026

Figure 40. Global MEMS Probe Cards for Storage Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global MEMS Probe Cards for Storage Revenue Market Share by Geographic Region in 2026

Figure 42. Americas MEMS Probe Cards for Storage Sales 2021-2026 (K Units)

Figure 43. Americas MEMS Probe Cards for Storage Revenue 2021-2026 (\$ millions)

Figure 44. APAC MEMS Probe Cards for Storage Sales 2021-2026 (K Units)

Figure 45. APAC MEMS Probe Cards for Storage Revenue 2021-2026 (\$ millions)

Figure 46. Europe MEMS Probe Cards for Storage Sales 2021-2026 (K Units)

Figure 47. Europe MEMS Probe Cards for Storage Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa MEMS Probe Cards for Storage Sales 2021-2026 (K Units)

Figure 49. Middle East & Africa MEMS Probe Cards for Storage Revenue 2021-2026 (\$ millions)

Figure 50. Americas MEMS Probe Cards for Storage Sales Market Share by Country in 2026

Figure 51. Americas MEMS Probe Cards for Storage Revenue Market Share by Country (2021-2026)

Figure 52. Americas MEMS Probe Cards for Storage Sales Market Share by Type (2021-2026)

Figure 53. Americas MEMS Probe Cards for Storage Sales Market Share by Application (2021-2026)

Figure 54. United States MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC MEMS Probe Cards for Storage Sales Market Share by Region in 2026

Figure 59. APAC MEMS Probe Cards for Storage Revenue Market Share by Region (2021-2026)

Figure 60. APAC MEMS Probe Cards for Storage Sales Market Share by Type (2021-2026)

Figure 61. APAC MEMS Probe Cards for Storage Sales Market Share by Application (2021-2026)

Figure 62. China MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 66. India MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe MEMS Probe Cards for Storage Sales Market Share by Country in 2026

Figure 70. Europe MEMS Probe Cards for Storage Revenue Market Share by Country

(2021-2026)

Figure 71. Europe MEMS Probe Cards for Storage Sales Market Share by Type

(2021-2026)

Figure 72. Europe MEMS Probe Cards for Storage Sales Market Share by Application

(2021-2026)

Figure 73. Germany MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 74. France MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa MEMS Probe Cards for Storage Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa MEMS Probe Cards for Storage Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa MEMS Probe Cards for Storage Sales Market Share by Application (2021-2026)

Figure 81. Egypt MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 85. GCC Countries MEMS Probe Cards for Storage Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of MEMS Probe Cards for Storage in 2026

Figure 87. Manufacturing Process Analysis of MEMS Probe Cards for Storage

Figure 88. Industry Chain Structure of MEMS Probe Cards for Storage

Figure 89. Channels of Distribution

Figure 90. Global MEMS Probe Cards for Storage Sales Market Forecast by Region (2027-2032)

Figure 91. Global MEMS Probe Cards for Storage Revenue Market Share Forecast by Region (2027-2032)

Figure 92. Global MEMS Probe Cards for Storage Sales Market Share Forecast by

Type (2027-2032)

Figure 93. Global MEMS Probe Cards for Storage Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global MEMS Probe Cards for Storage Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global MEMS Probe Cards for Storage Revenue Market Share Forecast by Application (2027-2032)

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