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Global Semiconductor Test Probe Systems Market Growth 2025-2031

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Abstracts

The global Semiconductor Test Probe Systems market size is predicted to grow from US$ 1679 million in 2025 to US$ 2402 million in 2031; it is expected to grow at a CAGR of 6.2% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

A Semiconductor Test Probe Systems is a device used to detect the electrical characteristics of a wafer during semiconductor development and manufacturing. Electrical testing involves sending test signals from a tester or tester to each device on the wafer through a probe or probe card, and obtaining signal feedback from each device.

At present, the explosive growth of global demand for artificial intelligence (AI) and high-performance computing (HPC) has accelerated the development progress of cutting-edge technologies, the commercialization of products, market development, and the layout of the industrial chain, effectively driving the market demand for related computing power and storage chips. After two years of technological improvements and ecological construction, emerging consumer electronic products such as smart wearable devices and smart homes have given birth to hot products such as AppleVision, becoming an important driving force for the growth of the semiconductor market. Automotive electronics, lithium batteries, photovoltaics and other previous high-speed growth fields have entered a critical window period for technology route selection and technology pattern reconstruction. New formats and models such as industrial Internet, smart medical care, and smart cities are accelerating their transformation,

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empowering social development and bringing about an increase in overall semiconductor market demand. According to statistics from the World Integrated Circuit Association (WICA), the global semiconductor market size in 2024 will be US$620.2 billion, a year-on-year increase of 17%.

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

Wafer testing is an important step performed in the manufacturing process of semiconductor devices. In this step, all individual integrated circuits present on the wafer are tested for functional defects by applying special test modes to them before the wafer is sent to chip preparation. Semiconductor probe stations play a vital role in chip manufacturing. According to our data, global semiconductor probe station sales in 2024 were 27,000 units, and are expected to exceed 40,000 units by 2030, with a compound annual growth rate of approximately 5.7%.

In the global competition landscape of semiconductor probe stations, Tokyo Seimitsu, Tokyo Electron, and Semis occupy a large market share. In 2024, CR3 is as high as 70%, and the market concentration is relatively high. In the Chinese (including Taiwan) market, high-end semiconductor probe stations are dominated by imports from the international market (Tokyo Seimitsu, Tokyo Electron, Semis, etc.), and low-end and mid-end products have begun to form a trend of domestic substitution. As the country pays more and more attention to independent technology research and development and policy support, it is expected that the domestic market will have great potential in the future.

Semiconductor probe stations can be divided into three types according to the degree of automation: manual, semi-automatic, and fully automatic. The low-cost advantages of manual and semi-automatic probe station instruments are mainly used in small-batch

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R&D tests. The advantages of fully automatic probe stations are their high degree of automation, high precision and versatility, which can greatly improve test efficiency and accuracy. They are mainly used in OSAT and IDMs, etc. According to our data, the revenue of fully automatic semiconductor probe stations will account for more than 80% in 2024.

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

LP Information, Inc. (LPI) ' newest research report, the “Semiconductor Test Probe Systems Industry Forecast” looks at past sales and reviews total world Semiconductor Test Probe Systems sales in 2024, providing a comprehensive analysis by region and market sector of projected Semiconductor Test Probe Systems sales for 2025 through 2031. With Semiconductor Test Probe Systems sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Semiconductor Test Probe Systems industry.

This Insight Report provides a comprehensive analysis of the global Semiconductor Test Probe Systems 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 Semiconductor Test Probe Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Semiconductor Test Probe Systems market.

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

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view of the current state and future trajectory in the global Semiconductor Test Probe Systems.

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

Segmentation by Type:

Manual Type

Semi-Automatic Type

Automatic Type

Segmentation by Application:

IDMs

OSAT

Research Institute

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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

Tokyo Seimitsu

Tokyo Electron

FormFactor

MPI

MarTek (Electroglas)

Wentworth Laboratories

Shen Zhen Sidea

Hprobe

Micronics Japan

Psaic

Lake Shore Cryotronics

KeithLink Technology

ESDEMC Technology

Semishare

KeyFactor Systems

MicroXact

SemiProbe

Micromanipulator

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Everbeing Int'l

HiSOL

Semics

Signatone

Fittech

STAr Technologies

Ecopia

Shenzhen Cindbest Technology

APOLLOWAVE

Probing Solutions, Inc.

Super Solutions & Services

Key Questions Addressed in this Report

What is the 10-year outlook for the global Semiconductor Test Probe Systems market?
What factors are driving Semiconductor Test Probe Systems market growth, globally and by region?
Which technologies are poised for the fastest growth by market and region?
How do Semiconductor Test Probe Systems market opportunities vary by end market size?
How does Semiconductor Test Probe Systems break out by Type, by Application?

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