

VLSIresearch

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Press Release

The semiconductor probe card market is set for recovery following a damaging 2009.

Santa Clara, CA – May 10th, 2010: VLSIresearch reports that the weak Memory IC market during 2009 had a severe impact upon demand for wafer test probe cards, with the final quarter of the year being weaker than expected. However, recovering demand for advanced Logic ICs drove stronger than expected demand, partially offsetting the Memory driven weakness. Overall probe card revenue declined 29% in 2009 compared to the total IC sales decline of only 8.5%. In 2010 sales of probe cards, including spares and service, are forecast to grow by 25.6% to \$927M, supported by a strong recovery in the Memory IC market as well as Non-Memory. In 2009 the total semiconductor probe card sales revenue fell to \$738M, which was only 53% of the peak revenue seen in 2007.

2009 saw further changes in the probe card supplier ranking as those with sales primarily into the Non-Memory segment gained share. Technoprobe (Italy) moved up to 4th position and Microprobe made big gains to take 5th position. FormFactor (USA), Micronics Japan Co. (MJC – Japan), and JEM (Japan) retained their top 3 ranking.

Over the next five years the overall probe card revenue is not expected to recover to the peak level seen in 2007, reflecting severe price pressure particularly at the lower end of probe card technology. VLSIresearch projects that the probe card market will reach \$1.3B by 2013.

TOP 5 Semiconductor Probe Card Vendors - 2009

(Including Service & Spares)

2009 Rank	Company	2009 \$M	2008 Rank	2008 \$M
1	FormFactor	135.3	1	210.2
2	Micronics Japan Co., Ltd (MJC)	118.2	2	193.3
3	JEM: Japan Electronic Materials	90.4	3	132.9
4	Technoprobe	36.1	6	37.0
5	Microprobe	34.6	9	31.2

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