

## VLSI RESEARCH INC

### Probe Card Market Reached \$1.1B in 2006

Santa Clara, CA, June 4, 2007: VLSI Research Inc reports that the market for probe cards used for testing IC wafers grew by 31% in 2006 to reach a record \$1.1B.

FormFactor (USA), JEM (Japan), and Micronics Japan Co. (MJC, Japan) maintained their strong lead at the top of the supplier ranking, while SV Probe (USA) jumped into fourth position as a result of their acquisition of Kulicke & Soffa's probe card business at the end of 1Q06. Tokyo Cathode Laboratories (Japan) retained their position as the fifth largest supplier.

The probe card market has experienced unprecedented growth over the last four years, according to VLSI Research, with an average annual growth rate of 28%. This has been fuelled by the demands of Memory IC test, where the average annual growth over the same period has been 47%. Most of this growth has come from Advanced<sup>7</sup> technology probe cards, which include Vertical & MEMS technologies cards. The market for the older "Cantilever" technology probe cards has only seen an average annual growth rate of around 11% over the same period. FormFactor, JEM, and MJC were also the Top Three suppliers of Advanced probe cards, with Phicom (Korea) taking fourth place.

VLSI Research projects that the probe card market will reach \$2B by 2012.

#### TOP 5 Semiconductor Probe Card Vendors - 2006

*(Including Service & Spares)*

<b>2006 Rank</b>	<b>Company</b>	<b>2006 \$M</b>	<b>2005 Rank</b>	<b>2005 \$M</b>
1	FormFactor	369.7	1	237.5
2	JEM: Japan Electronic Materials	150.3	2	130.9
3	Micronics Japan Co., Ltd (MJC)	126.7	3	78.8
4	SV Probe	59.6	6	27.3
5	Tokyo Cathode Laboratories Inc	47.6	5	39.0

Source: VLSI RESEARCH INC

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*Advanced Probe Cards include Vertical, Membrane, Spring, and MEMS technologies.*

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