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VLSI RESEARCH INC

Big changes in Probe Card supplier shares as a result of 2008 IC market turmoil

Santa Clara, CA, April 23rd, 2009: VLSI Research Inc reports that the global economic downturn has had a seriously detrimental impact on the market for probe cards used for testing IC wafers during 2008, and that 2009 sales will be down even further. Probe card revenues declined by 26.9% in 2008 compared to a 4.2% decline in IC sales. This weakness was driven largely by sharp cutbacks within the Memory sector. In 2009, sales of probe cards, including spares and service, are forecast to decline a further 24.5% to only US\$0.77B, down from US\$1.0B in 2008. This compares to nearly US\$1.4B in revenues in 2007.

The 2008 probe card supplier ranking saw a number of changes, as those that rely heavily on the Memory market suffered declines. FormFactor (USA), Micronics Japan Co. (MJC - Japan), and JEM (Japan) maintained their lead at the top of the supplier ranking, while SV Probe (USA) climbed into the 4th position, up from 5th in 2007. Technoprobe (Italy) jumped to 5th place from 7th last year.

Over the coming five years probe card revenues are not expected to recover to the levels previously forecast, reflecting the lower level of IC production over this period. Additionally, the very high historic growth rate in demand for Memory test probe cards is expected to remain subdued. VLSI Research projects that the probe card market will reach \$1.5B by 2013.

TOP 5 Semiconductor Probe Card Vendors - 2008

(Including Service & Spares)

2008 Rank	Company	2008 \$M	2007 Rank	2007 \$M
1	FormFactor	210.2	1	462.2
2	Micronics Japan Co., Ltd (MJC)	193.3	2	162.2
3	JEM: Japan Electronic Materials	132.9	3	130.1
4	SV Probe Inc	41.8	5	54.4
5	Technoprobe	37.0	7	36.3

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