

Global Phased Array Flaw Detectors Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Phased Array Flaw Detectors competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Phased Array Flaw Detector (PAFD) is a nondestructive testing device that uses phased array ultrasonic technology to detect defects such as cracks, voids and inhomogeneities inside materials. Compared with traditional ultrasonic flaw detection methods, PAFD is able to electronically control the transmission angle and focal length of multiple ultrasonic probes, allowing for more flexible and precise detection. Ultrasonic phased array systems can be used for almost any inspection commonly used by traditional ultrasonic flaw detectors. Weld inspection and crack inspection are the most important applications, and these inspections are involved in a wide range of industries such as aerospace, power generation, petrochemical, metal billet and tube suppliers, pipeline construction and maintenance, structural metals and general manufacturing. Phased array systems are also effectively used for remaining wall thickness analysis in corrosion measurement applications. The advantage of phased array technology over traditional UT is its ability to control, focus and scan the beam through a single transducer assembly using multiple elements. Beam steering (commonly known as sector scanning) can be used to map components at appropriate angles. The global phased array flaw detector market is growing rapidly driven by industrial safety upgrades and smart manufacturing needs. The core driving forces come from strict safety regulations, the explosion of demand for precision parts in the new energy and aerospace fields (increased penetration of power battery/aircraft engine detection), and the automation transformation of traditional industries (replacing radiographic detection). The market presents a dual-track competition pattern: the high-end field is dominated by Evident and Baker Hughes, relying on technologies such as

total focusing (TFM) and 3D imaging to monopolize the nuclear power and aviation markets; the mid-end and localized markets are seized by domestic manufacturers such as Shantou Ultrasonics (SIUI) and Wuhan Zhongke Innovation, which accelerate substitution with price advantages (30%-40% lower) and customized services. North America is the largest market, accounting for about 43% of the market share, followed by Europe and Asia Pacific, accounting for 27% and 27% of the market share respectively. In terms of product type, 64 channels are the largest segment, accounting for about 58% of the market share. At the same time, in terms of downstream, aerospace and defense are the largest downstream fields, accounting for 33% of the market share. Future technological evolution focuses on portability and lightweight (

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