

# Global 3D Automatic X-ray Inspection (AXI) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global 3D Automatic X-ray Inspection (AXI) market size is expected to reach \$ 983 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

In 2025, global 3D Automatic X-ray Inspection (AXI) production reached approximately 2,930 units, with an average global market price of around K US\$ 173.56 per unit.

3D Automated X-ray Inspection (AXI) is an advanced non-destructive testing technology that uses X-rays to examine the internal structure of printed circuit board assemblies (PCBAs). It is particularly vital for inspecting hidden solder joints, such as those in Ball Grid Array (BGA), Chip Scale Package (CSP), and other components where connections are not visible to the naked eye or traditional optical systems.

3D Automated X-ray Inspection (3D AXI) is an automated, non-destructive inspection system designed for electronics manufacturing and advanced packaging. It uses micro-/meso-focus X-ray sources and high-sensitivity detectors to capture internal transmission images, and reconstructs volumetric data via tomographic methods (e.g., in-line CT or laminography) for quantitative pass/fail decisions and traceable quality records. Unlike AOI, which primarily detects surface-level appearance defects, 3D AXI targets hidden failure mechanisms such as solder voiding and wetting issues in BGA/CSP/flip-chip assemblies, head-in-pillow, micro-cracks, internal misalignment, and structural defects in HDI/IC substrates and power modules. When connected to MES/SPC, 3D AXI increasingly functions as a process-control node?turning defect detection into process-window optimization and yield ramp acceleration. As chiplet-based and 3D packaging architectures become more complex, the effectiveness of 2D X-ray decisioning declines, accelerating the industry?s shift toward high-resolution, in-line CT-class 3D AXI platforms.

Production model: 3D AXI is typically characterized by high R&D intensity, modular platform engineering, and application-specific configuration. Core subsystems include

the X-ray source/high-voltage chain, detector, motion control and shielding/safety structure, reconstruction and defect-recognition algorithms, and end-to-end integration with line data systems. OEMs usually keep core imaging/software IP in-house, outsource portions of precision machining/sheet metal and selected electronics, and perform final integration, calibration, radiation safety compliance, and reliability validation internally. Software licenses, algorithm packages, and lifecycle services (warranty/maintenance/upgrades) increasingly lift service contribution over time. Gross margin (indicative range): Based on disclosed profitability benchmarks of comparable precision equipment and test/inspection players (mid-45% gross margin as a typical center), 3D AXI commonly falls in a 40%-55% gross margin range, with high-end 3D/CT-capable platforms (and stronger software/data monetization) generally outperforming entry-level or 2D systems.

Value chain: Upstream?X-ray tubes and HV power, detectors/imaging components, precision motion/control, shielding and safety parts, industrial computing and software stack; Midstream?3D AXI OEMs and solution integrators (including analytics/data platforms); Downstream?advanced packaging/OSAT, semiconductor-related manufacturing, PCB & IC substrates, EMS/SMT, automotive electronics & power devices, batteries/energy electronics, and other high-reliability NDT use cases.

#### Market Development Opportunities & Main Driving Factors

The growth logic for 3D AXI is driven by the convergence of higher interconnect density, stricter reliability requirements, and data-driven quality control. Chiplet and advanced packaging raise 3D structural complexity, clearly exposing the limits of 2D decisioning and accelerating adoption of in-line CT-class 3D AXI as core yield-and-stability infrastructure. Meanwhile, AI servers, data centers, and automotive electronics are pushing the mix toward high-end PCB (HDI and IC substrates), making interconnect reliability a decisive factor in cost and delivery performance. On the policy side, China's electronics manufacturing digital transformation roadmap explicitly highlights non-destructive testing and high-precision in-line quality inspection with end-to-end batch traceability?supporting structural demand for 3D AXI within modern quality systems.

#### Market Challenges, Risks, & Restraints

Key barriers are technical, organizational, and supply-chain related. High-end 3D reconstruction and quantitative defect metrics require exceptional imaging-chain consistency, thermal stability, and motion precision?while still meeting line takt time?making system engineering far more complex than 2D. Customer qualification cycles are long because value must be proven through correlation with MES/SPC, process parameters, and material lots, which raises validation and cross-functional adoption costs. Additionally, cost and availability volatility in critical components (X-ray sources, detectors), radiation safety compliance, and geopolitical/export-control uncertainty can amplify delivery and margin variability. Cyclical softness in traditional

industrial end markets may also pressure short-term profitability for certain X-ray systems businesses.

#### Downstream Demand Trends

Demand is shifting from ?finding defects? to ?controlling processes.? In semiconductors and advanced packaging, 3D AXI is increasingly used to quantify solder volume/voiding/wetting states and accelerate yield ramps, while AI-based automation improves program creation and decision consistency amid rapid process iteration. In PCB and electronics assembly, rising penetration of high-end boards and dense packaging?driven by AI compute and automotive electronics?pushes 3D AXI toward higher throughput, finer defect sensitivity, and stronger traceability analytics. In energy electronics (battery and PV), quality traceability and in-line inspection system build-out is accelerating, raising demand for radiographic NDT and full-lifecycle quality data integration. Overall, 3D AXI is evolving from ?equipment sales? into a combined delivery of equipment + software + data services.

Global key 3D Automatic X-ray Inspection (AXI) players cover ViTrox, Nordson, Viscom, Unicomp Technology, Innometry, NIKON, Omron, Waygate Technologies (Baker Hughes), Seamark ZM, Comet Yxlon, Zhengye Technology, Test Research Inc. (TRI), XAVIS Co., Ltd., ZEISS, Saki Corporation, SEC, Techvalley, Scienscope, SXRAY, DC Precision, Goepel Electronic, Creative Electron, etc. In terms of revenue, the global three largest companies occupies occupied for a share nearly 34% in 2025.

This report studies the global 3D Automatic X-ray Inspection (AXI) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 3D Automatic X-ray Inspection (AXI) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 3D Automatic X-ray Inspection (AXI) that contribute to its increasing demand across many markets.

#### **Highlights and key features of the study**

Global 3D Automatic X-ray Inspection (AXI) total production and demand, 2021-2032, (Units)

Global 3D Automatic X-ray Inspection (AXI) total production value, 2021-2032, (USD Million)

Global 3D Automatic X-ray Inspection (AXI) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global 3D Automatic X-ray Inspection (AXI) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: 3D Automatic X-ray Inspection (AXI) domestic production, consumption, key domestic manufacturers and share

Global 3D Automatic X-ray Inspection (AXI) production by manufacturer, production,

price, value and market share 2021-2026, (USD Million) & (Units)

Global 3D Automatic X-ray Inspection (AXI) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global 3D Automatic X-ray Inspection (AXI) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global 3D Automatic X-ray Inspection (AXI) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ViTrox, Nordson, Viscom, Unicomp Technology, Innometry, NIKON, Omron, Waygate Technologies (Baker Hughes), Seamark ZM, Comet Yxlon, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 3D Automatic X-ray Inspection (AXI) market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 3D Automatic X-ray Inspection (AXI) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global 3D Automatic X-ray Inspection (AXI) Market, Segmentation by Type:

Inline X-ray Inspection Equipment

Offline X-ray Inspection Equipment

## Global 3D Automatic X-ray Inspection (AXI) Market, Segmentation by Technology Type:

General 3D AXI

3D CT-AXI

## Global 3D Automatic X-ray Inspection (AXI) Market, Segmentation by Production Line Type:

Large-volume Production

Prototype and Small Quantities

## Global 3D Automatic X-ray Inspection (AXI) Market, Segmentation by Application:

PCB Industry

Integrated Circuits

Battery Industry

LED & Casting

Others

## **Companies Profiled:**

ViTrox

Nordson

Viscom

Unicomp Technology

Innometry

NIKON

Omron

Waygate Technologies (Baker Hughes)

Seamark ZM

Comet Yxlon

Zhengye Technology

Test Research Inc. (TRI)

XAVIS Co., Ltd.

ZEISS

Saki Corporation

SEC

Techvalley

Scienscope

SXRAY

DC Precision

Goepel Electronic

## Creative Electron

### **Key Questions Answered:**

1. How big is the global 3D Automatic X-ray Inspection (AXI) market?
2. What is the demand of the global 3D Automatic X-ray Inspection (AXI) market?
3. What is the year over year growth of the global 3D Automatic X-ray Inspection (AXI) market?
4. What is the production and production value of the global 3D Automatic X-ray Inspection (AXI) market?
5. Who are the key producers in the global 3D Automatic X-ray Inspection (AXI) market?
6. What are the growth factors driving the market demand?

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