

Global Air-Coupled Ultrasonic Testing System Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GC916A36D175EN.html>

Date: September 2026

Pages: 139

Price: US\$ 4,480.00 (Single User License)

ID: GC916A36D175EN

Abstracts

The global Air-Coupled Ultrasonic Testing System market size is expected to reach \$ 250 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

Air-Coupled Ultrasonic Testing Systems are non-contact ultrasonic inspection systems that transmit and receive ultrasonic waves through air instead of using liquid couplants or direct-contact probes. They are used to detect delamination, bonding defects, voids, cracks, density variation, impact damage, thickness nonuniformity, and internal discontinuities in composites, foams, honeycomb panels, wood products, ceramics, aerospace structures, battery materials, and advanced industrial materials. A typical system includes air-coupled ultrasonic transducers, pulser-receivers, motion scanners, signal amplifiers, data acquisition modules, imaging software, positioning systems, fixtures, and shielding structures. This category excludes conventional contact ultrasonic flaw detectors, immersion ultrasonic systems, standalone probes, X-ray inspection systems, acoustic emission systems, and general nondestructive testing services. The industrial chain of Air-Coupled Ultrasonic Testing Systems includes upstream suppliers of air-coupled transducers, piezoelectric materials, matching layers, pulser-receiver circuits, amplifiers, data acquisition boards, motion control modules, linear stages, robotic scanning components, sensors, cables, electronic boards, shielding materials, fixtures, software modules, industrial computers, metal frames, precision machined parts, calibration blocks, and packaging materials. The midstream consists of nondestructive testing equipment manufacturers that design and assemble ultrasonic transmission modules, receiving systems, scanning platforms, imaging algorithms, signal-processing software, automation interfaces, safety enclosures, and customized inspection configurations for different material types and production environments. Downstream users include aerospace manufacturers, composite material

producers, battery material companies, automotive suppliers, research institutes, universities, wood-product manufacturers, ceramic producers, rail and infrastructure laboratories, and industrial quality-control departments.

The Air-Coupled Ultrasonic Testing System market is a specialized nondestructive testing market rather than a broad ultrasonic flaw-detection equipment market. Demand is supported by composites, aerospace structures, lightweight materials, battery materials, wood products, ceramics, and advanced manufacturing quality control. Demand quality is strongest where liquid couplants or contact probes are unsuitable because of surface contamination risk, fragile materials, porous structures, curved parts, or production-line automation requirements. Buyers focus on signal sensitivity, transducer performance, scanning stability, defect-imaging quality, software interpretation, automation compatibility, inspection speed, and repeatability across difficult materials. The market favors suppliers that combine ultrasonic hardware, signal-processing capability, application method development, and production-line integration. Main challenges include weak signal transmission through air, material-specific calibration difficulty, high system customization, competition from other inspection methods, and limited adoption outside high-value industrial applications. In 2025, global Air-Coupled Ultrasonic Testing System production reached approximately 1.07 thousand units, with an average global market price of around US\$148,000 per unit. The gross profit margin of major companies in the industry ranged from 31% to 49%. In 2025, the global production capacity of Air-Coupled Ultrasonic Testing Systems was approximately 1.42 thousand units.

Report Scope

This report studies the global Air-Coupled Ultrasonic Testing System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air-Coupled Ultrasonic Testing System 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 Air-Coupled Ultrasonic Testing System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air-Coupled Ultrasonic Testing System total production and demand, 2021-2032, (Units)

Global Air-Coupled Ultrasonic Testing System total production value, 2021-2032, (USD Million)

Global Air-Coupled Ultrasonic Testing System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Air-Coupled Ultrasonic Testing System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Air-Coupled Ultrasonic Testing System domestic production, consumption, key domestic manufacturers and share

Global Air-Coupled Ultrasonic Testing System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Air-Coupled Ultrasonic Testing System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Air-Coupled Ultrasonic Testing System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Air-Coupled Ultrasonic Testing System 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 SONOTEC GmbH, Hillger NDT GmbH, DASEL, S.L., I-Deal Technologies GmbH & Co. KG, STARMANS electronics, s.r.o., Quality Material Inspection, Inc., Airstar Inc., UTEX Scientific Instruments Inc., NDT Systems Inc., PTI Corporation, 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 Air-Coupled Ultrasonic Testing System 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 Air-Coupled Ultrasonic Testing System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Air-Coupled Ultrasonic Testing System Market, Segmentation by Type:

Through-Transmission Systems

Single-Sided Pitch-Catch Systems

Single-Sided Pulse-Echo Systems

Multi-Mode Systems

Global Air-Coupled Ultrasonic Testing System Market, Segmentation by Scanning Motion Architecture:

Handheld Free-Motion Scanning Systems

Cartesian Gantry Scanning Systems

Robot-Based Scanning Systems

Conveyor In-Line Scanning Systems

Fixed-Point Non-Scanning Systems

Global Air-Coupled Ultrasonic Testing System Market, Segmentation by Transducer Nominal Center Frequency:

Up to 100 kHz

Over 100 kHz and Up to 500 kHz

Over 500 kHz and Up to 1 MHz

Over 1 MHz

Global Air-Coupled Ultrasonic Testing System Market, Segmentation by Application:

Aerospace Manufacturing

Automotive Manufacturing

Battery Manufacturing

Rail Equipment Manufacturing

Wind Energy Equipment Manufacturing

Electronic Equipment Manufacturing

Research and Testing Institutions

Others

Companies Profiled:

SONOTEC GmbH

Hillger NDT GmbH

DASEL, S.L.

I-Deal Technologies GmbH & Co. KG

STARMANS electronics, s.r.o.

Quality Material Inspection, Inc.

Airstar Inc.

UTEX Scientific Instruments Inc.

NDT Systems Inc.

PTI Corporation

The Ultran Group, Inc.

TPAC

JAPAN PROBE CO., LTD.

GNES Corporation

Hakko Automation Co., Ltd.

TECLAB (CHINA) LIMITED

Beijing Caisheng Technology Co., Ltd.

Suzhou Phaserise Technology Co., Ltd.

Key Questions Answered

1. How big is the global Air-Coupled Ultrasonic Testing System market?
2. What is the demand of the global Air-Coupled Ultrasonic Testing System market?
3. What is the year over year growth of the global Air-Coupled Ultrasonic Testing System market?
4. What is the total value of the global Air-Coupled Ultrasonic Testing System market?
5. Who are the Major Players in the global Air-Coupled Ultrasonic Testing System market?
6. What are the growth factors driving the market demand?

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