

Global Air-Coupled Ultrasonic Testing System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Air-Coupled Ultrasonic Testing System market size was valued at US\$ 163 million in 2025 and is forecast to a readjusted size of US\$ 250 million by 2032 with a CAGR of 6.3% during review period.

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 is a detailed and comprehensive analysis for global Air-Coupled Ultrasonic Testing System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Air-Coupled Ultrasonic Testing System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Air-Coupled Ultrasonic Testing System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Air-Coupled Ultrasonic Testing System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Air-Coupled Ultrasonic Testing System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Air-Coupled Ultrasonic Testing System
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Air-Coupled Ultrasonic Testing System market based on the following parameters - company overview, sales quantity, revenue, 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.

Air-Coupled Ultrasonic Testing System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Through-Transmission Systems

Single-Sided Pitch-Catch Systems

Single-Sided Pulse-Echo Systems

Multi-Mode Systems

Market segment 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

Market segment 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

Market segment by Application

Aerospace Manufacturing

Automotive Manufacturing

Battery Manufacturing

Rail Equipment Manufacturing

Wind Energy Equipment Manufacturing

Electronic Equipment Manufacturing

Research and Testing Institutions

Others

Major players covered

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.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Air-Coupled Ultrasonic Testing System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Air-Coupled Ultrasonic Testing System, with price, sales quantity, revenue, and global market share of Air-Coupled Ultrasonic Testing System from 2021 to 2026.

Chapter 3, the Air-Coupled Ultrasonic Testing System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Air-Coupled Ultrasonic Testing System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Air-Coupled Ultrasonic Testing System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Air-Coupled Ultrasonic Testing System.

Chapter 14 and 15, to describe Air-Coupled Ultrasonic Testing System sales channel, distributors, customers, research findings and conclusion.

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