

Global Automated Magnetic Flux Leakage Inspection Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automated Magnetic Flux Leakage Inspection Systems market size is expected to reach \$ 1534 million by 2032, rising at a market growth of 6.5% CAGR during the forecast period (2026-2032).

Automated Magnetic Flux Leakage Inspection Systems are integrated industrial nondestructive testing platforms designed to identify corrosion, pitting, volumetric metal loss, broken wires, manufacturing discontinuities, and other defects in ferromagnetic assets. These systems magnetize the inspected material through permanent-magnet, direct-current electromagnetic, alternating-current, or hybrid excitation and capture localized leakage fields using Hall-effect, GMR, TMR, or other magnetic sensors. The research scope covers pipeline in-line inspection tools, robotic and tethered inspection platforms, tank-floor and steel-plate scanners, fixed production-line systems for tubes, pipes, bars, rods, and wires, wire-rope inspection systems, portable MFL equipment, and associated acquisition, positioning, imaging, defect-classification, and reporting software. The market focuses on commercially deployed systems with identifiable magnetization modules, sensor arrays, mechanical motion or material-handling platforms, control electronics, and data-interpretation capabilities, together with system-enabled revenues generated by operators that design, manufacture, own, and deploy proprietary MFL tool fleets.

Key Findings

Pipeline systems generate nearly 68% of 2025 market revenue

Thirty-seven confirmed manufacturers form the global core supplier pool

Production-line systems contribute approximately 15% of total market revenue

North America and Europe lead high-end system development and deployment

China has a broad long tail of wire-rope equipment manufacturers

Equipment sales and proprietary inspection services coexist across the market

Market Trends

Automated Magnetic Flux Leakage (MFL) Inspection Systems are evolving from basic defect-detection equipment into integrated asset-integrity platforms capable of classification, sizing, localization, visualization, and historical comparison. Pipeline tools are increasingly adopting tri-axial sensing, axial and circumferential field combinations, dual-field inspection, geometry measurement, inertial mapping, and multi-sensor data fusion. Tank-floor scanners are improving edge coverage, positional accuracy, scan speed, and digital corrosion mapping, while wire-rope systems are combining loss-of-metallic-area and localized-flaw measurements with more automated interpretation. Artificial intelligence is being applied primarily to signal filtering, anomaly classification, repeat-inspection alignment, and analyst productivity. The longer-term direction is toward robotic deployment, reduced dependence on manual interpretation, integrated lifecycle databases, and closer linkage between inspection results and maintenance planning.

Market Dynamics

Drivers

Demand is supported by aging pipelines, storage tanks, production assets, lifting systems, and other safety-critical ferromagnetic infrastructure that requires periodic integrity assessment. Regulatory and technical requirements for pipeline inspection, traceable defect evaluation, production-line quality control, and rope safety monitoring are increasing the value of repeatable automated inspection. Investment in pipeline integrity management, steel-product quality assurance, industrial automation, and asset digitalization also encourages replacement of manual or low-density testing methods

with higher-resolution MFL systems. The absence of liquid couplants, comparatively high scanning speeds, and suitability for gas pipelines and broad-area corrosion screening remain important commercial advantages.

Restraints

High system-development, calibration, validation, and field-qualification costs limit the number of suppliers capable of competing in critical applications. MFL signals are influenced by wall thickness, material grade, magnetization level, inspection speed, lift-off, coatings, geometry, and defect orientation, making accurate sizing dependent on extensive reference data and experienced interpretation. Demand can also be affected by long project approval cycles and irregular capital expenditure. Ultrasonic testing, phased-array ultrasonic testing, EMAT, eddy-current methods, LFET, and other electromagnetic or acoustic techniques may provide superior performance for selected wall-thickness, crack-detection, or high-resolution mapping requirements.

Opportunities

The strongest opportunities lie in unpiggable and small-diameter pipelines, robotic inspection of operating tanks and confined assets, higher-density digital corrosion mapping, and automated production-line quality control. Suppliers can create additional value by integrating MFL data with geometry, inertial, ultrasonic, or visual information and by providing cloud-based comparison, engineering assessment, and maintenance-prioritization tools. Emerging regional manufacturers also have opportunities in localized equipment production, faster field support, application-specific customization, and lower-cost wire-rope or tank-floor systems. Recurring software, calibration, fleet-management, and data-analysis services can expand revenue beyond the initial hardware transaction.

Challenges

The industry faces persistent challenges in standardizing performance claims, comparing detection thresholds across suppliers, and transferring calibration results from controlled reference samples to complex field conditions. Tool reliability, sensor consistency, mechanical durability, navigation accuracy, and data quality must be maintained under varying temperatures, speeds, pressures, coatings, and surface conditions. The market also depends on experienced analysts and inspection engineers, creating a skills constraint even as interpretation becomes more automated.

Smaller manufacturers may encounter long qualification periods, limited access to representative defect libraries, and difficulty establishing customer confidence in safety-critical applications.

Industry Chain Analysis

The upstream industry chain consists of permanent magnets and magnetic materials, Hall-effect and magnetoresistive sensors, coils, electronic components, data-acquisition boards, encoders, motors, batteries, robotic drive systems, precision mechanical parts, industrial computers, and specialized software-development tools. Component quality directly affects magnetic-field stability, channel consistency, positional accuracy, environmental resistance, and inspection repeatability. High-specification magnetic materials, sensor arrays, ruggedized electronics, and precision mechanical structures account for a significant portion of hardware cost, while calibration facilities and defect-reference samples create additional fixed investment requirements.

The midstream segment integrates magnetization modules, sensing arrays, motion platforms, control electronics, acquisition software, defect-recognition algorithms, and reporting systems into application-specific equipment. Value creation is highest where manufacturers combine hardware engineering with proprietary calibration databases, field experience, interpretation software, and recurring technical services. Downstream deployment covers pipeline integrity inspection, tank-floor corrosion mapping, steel-tube and bar production testing, wire-rope condition monitoring, and other specialized ferromagnetic asset applications. Profitability generally improves as suppliers move from standard hardware toward validated system platforms, proprietary tool-fleet services, software, engineering interpretation, calibration, and lifecycle support.

Segment Insights

Pipeline in-line and robotic MFL systems represented approximately 68% of 2025 market revenue, making them the largest product segment by a substantial margin. Their position reflects the high value of inspection tools, project execution, data interpretation, and engineering assessment rather than equipment volume alone. Production-line MFL systems contributed about 15%, supported by steel-tube, OCTG, bar, rod, and wire quality-control requirements. Tank-floor and plate scanners represented roughly 9%, while magnetic rope testing systems accounted for around 6%; other specialized systems formed the remaining share.

Product structure varies significantly by application. Pipeline systems are dominated by proprietary tool-fleet operators and customized project revenues, whereas production-line systems are generally delivered as engineered capital equipment. Tank-floor scanners and portable systems have more standardized equipment configurations, while wire-rope systems combine equipment sales, monitoring solutions, calibration, and inspection services. Robotic MFL platforms, multi-directional sensing, and integrated interpretation software are expected to capture a rising share of value even where unit volumes remain limited.

Downstream Market Opportunities

Pipeline integrity management remains the principal application opportunity because inspection demand is recurring and increasingly linked to corrosion-growth assessment, repeat-run comparison, and maintenance prioritization. Storage terminals and process facilities create demand for faster tank-floor mapping during restricted shutdown windows, while steel producers require higher-speed and more traceable inspection of tubes, bars, and wire products. Mining, lifting, port, offshore, ropeway, and infrastructure operators offer additional opportunities for permanent or periodic wire-rope monitoring. The most attractive applications are those where asset failure has high economic or safety consequences and where automated inspection can reduce downtime, expand coverage, or improve data consistency.

Regional Insights

North America represents the leading regional market in the current study model, supported by an extensive pipeline network, mature integrity-management practices, a large installed base of storage and industrial assets, and a broad group of pipeline, tank-floor, production-line, and wire-rope system suppliers. Europe has a comparable concentration of high-end engineering capabilities, particularly in pipeline diagnostics, steel-production testing, robotic inspection, and magnetic rope testing. Both regions compete primarily through validated performance, software, installed data, global service coverage, and technical specialization rather than equipment price alone.

Asia-Pacific offers the clearest incremental expansion potential. China has developed a broad manufacturing base in wire-rope inspection, pipeline tools, tank-floor equipment, and industrial MFL systems, although supplier scale and disclosure quality remain

uneven. Southeast Asian and Middle Eastern companies are expanding localized pipeline-tool fleets around regional oil and gas infrastructure. Japan and South Korea maintain strong industrial inspection capabilities but have fewer independently visible MFL system manufacturers. Regional growth opportunities are therefore shaped by localization, qualification requirements, field-service availability, and the ability to adapt systems to local asset conditions.

Competitive Landscape Analysis

The competitive landscape is tiered and varies materially by product category. The pipeline segment is led by integrated platform operators with proprietary tool fleets, large calibration databases, experienced analysis teams, and international project networks. Companies such as Baker Hughes, ROSEN Group, T.D. Williamson, NDT Global, Quanta Services through Q-Inline, MISTRAS Group through Onstream, Intertek, and PIPECARE compete on inspection reliability, defect-sizing performance, tool availability, data interpretation, and engineering support. Production-line equipment is more concentrated among specialist industrial manufacturers with deep knowledge of steel-processing conditions, while tank-floor and wire-rope markets contain a larger number of focused and regional suppliers. The confirmed core supplier pool contains 37 parent companies or independent manufacturers after consolidating subsidiaries and brands. Future competition will increasingly depend on multi-sensor integration, robotic accessibility, software capabilities, repeat-inspection analytics, local service responsiveness, and the ability to convert inspection data into actionable asset-management decisions.

Report Scope

This report studies the global Automated Magnetic Flux Leakage Inspection Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automated Magnetic Flux Leakage Inspection Systems 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 Automated Magnetic Flux Leakage Inspection Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automated Magnetic Flux Leakage Inspection Systems total production and demand, 2021-2032, (Units)

Global Automated Magnetic Flux Leakage Inspection Systems total production value, 2021-2032, (USD Million)

Global Automated Magnetic Flux Leakage Inspection Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Automated Magnetic Flux Leakage Inspection Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Automated Magnetic Flux Leakage Inspection Systems domestic production, consumption, key domestic manufacturers and share

Global Automated Magnetic Flux Leakage Inspection Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Automated Magnetic Flux Leakage Inspection Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Automated Magnetic Flux Leakage Inspection Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Automated Magnetic Flux Leakage Inspection Systems 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 Baker Hughes Company, ROSEN Group, T.D. Williamson, Inc., NDT Global GmbH, PJSC Transneft, Quanta Services, Inc., MISTRAS Group, Inc., ESAB Corporation, Intertek Group plc, PIPECARE Group AG, 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 Automated Magnetic Flux Leakage Inspection Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 Automated Magnetic Flux Leakage Inspection Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automated Magnetic Flux Leakage Inspection Systems Market, Segmentation by Type:

Pipeline In-line Inspection Systems

Production-line Inspection Systems

Robotic MFL Inspection Systems

Other Specialized Systems

Global Automated Magnetic Flux Leakage Inspection Systems Market, Segmentation by Magnetization Direction:

Axial MFL

Circumferential MFL

Transverse MFL

Spiral MFL

Other Magnetization Directions

Global Automated Magnetic Flux Leakage Inspection Systems Market, Segmentation by Excitation Method:

Permanent Magnet Excitation

DC Electromagnetic Excitation

AC Electromagnetic Excitation

Other Excitation Methods

Global Automated Magnetic Flux Leakage Inspection Systems Market, Segmentation by Level of Automation:

Fully Automated Systems

Semi-automated Systems

Other

Global Automated Magnetic Flux Leakage Inspection Systems Market, Segmentation by Application:

Pipeline Corrosion Inspection

Storage Tank Floor Inspection

Wire Rope and Cable Inspection

Other Component Inspection

Companies Profiled:

Baker Hughes Company

ROSEN Group

T.D. Williamson, Inc.

NDT Global GmbH

PJSC Transneft

Quanta Services, Inc.

MISTRAS Group, Inc.

ESAB Corporation

Intertek Group plc

PIPECARE Group AG

Institut Dr. Foerster GmbH & Co. KG

Magnetic Analysis Corporation

TÜV NORD GROUP

Enduro Pipeline Services, Inc.

3P Services GmbH & Co. KG

Intero Integrity Services B.V.

Diakont

DEXON Technology Public Company Limited

MFE Enterprises, Inc.

IP Pipeline Technology Co., Ltd.

China Petroleum Pipeline Inspection Technology Co., Ltd.

Shenyang Institute of Instrumentation Science Co., Ltd.

Chengdu Xiongnu Jiashi Dianqi Co., Ltd.

LIN SCAN Advanced Pipelines & Tanks Services

Romstar Sdn Bhd

GeoCorr LLC

Pipesurvey International C.V.

Baugh & Weedon Ltd

EDDYSUN (XIAMEN) ELECTRONIC CO., LTD.

UPP Pipeline Services Ltd.

KMAX Inspection LLC

Wuhan HYEM Testing Equipment Co., Ltd.

NDT Technologies, LLC

INTRON PLUS

ROPESYS GmbH

LRM-NDE Laboratory

Chengdu Zhongchai Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Automated Magnetic Flux Leakage Inspection Systems market?
2. What is the demand of the global Automated Magnetic Flux Leakage Inspection Systems market?
3. What is the year over year growth of the global Automated Magnetic Flux Leakage Inspection Systems market?
4. What is the production and production value of the global Automated Magnetic Flux Leakage Inspection Systems market?
5. Who are the key producers in the global Automated Magnetic Flux Leakage Inspection Systems market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Automated Magnetic Flux Leakage Inspection Systems Introduction
- 1.2 World Automated Magnetic Flux Leakage Inspection Systems Supply & Forecast
 - 1.2.1 World Automated Magnetic Flux Leakage Inspection Systems Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
 - 1.2.3 World Automated Magnetic Flux Leakage Inspection Systems Pricing Trends (2021-2032)
- 1.3 World Automated Magnetic Flux Leakage Inspection Systems Production by Region (Based on Production Site)
 - 1.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Region (2021-2032)
 - 1.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production by Region (2021-2032)
 - 1.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2021-2032)
 - 1.3.4 North America Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
 - 1.3.5 Europe Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
 - 1.3.6 China Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
 - 1.3.7 Southeast Asia Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
 - 1.3.8 Middle East Automated Magnetic Flux Leakage Inspection Systems Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Automated Magnetic Flux Leakage Inspection Systems Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Automated Magnetic Flux Leakage Inspection Systems Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Automated Magnetic Flux Leakage Inspection Systems Demand (2021-2032)
- 2.2 World Automated Magnetic Flux Leakage Inspection Systems Consumption by

Region

2.2.1 World Automated Magnetic Flux Leakage Inspection Systems Consumption by Region (2021-2026)

2.2.2 World Automated Magnetic Flux Leakage Inspection Systems Consumption Forecast by Region (2027-2032)

2.3 United States Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.4 China Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.5 Europe Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.6 Japan Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.7 South Korea Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.8 ASEAN Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

2.9 India Automated Magnetic Flux Leakage Inspection Systems Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Manufacturer (2021-2026)

3.2 World Automated Magnetic Flux Leakage Inspection Systems Production by Manufacturer (2021-2026)

3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Manufacturer (2021-2026)

3.4 Automated Magnetic Flux Leakage Inspection Systems Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Automated Magnetic Flux Leakage Inspection Systems Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Automated Magnetic Flux Leakage Inspection Systems in 2025

3.5.3 Global Concentration Ratios (CR8) for Automated Magnetic Flux Leakage Inspection Systems in 2025

3.6 Automated Magnetic Flux Leakage Inspection Systems Market: Overall Company Footprint Analysis

- 3.6.1 Automated Magnetic Flux Leakage Inspection Systems Market: Region Footprint
- 3.6.2 Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Type Footprint
- 3.6.3 Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Value Comparison
 - 4.1.1 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Comparison
 - 4.2.1 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Consumption Comparison
 - 4.3.1 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Automated Magnetic Flux Leakage Inspection Systems Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value (2021-2026)
 - 4.4.3 United States Based Manufacturers Automated Magnetic Flux Leakage

Inspection Systems Production (2021-2026)

4.5 China Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers and Market Share

4.5.1 China Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value (2021-2026)

4.5.3 China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production (2021-2026)

4.6 Rest of World Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Automated Magnetic Flux Leakage Inspection Systems Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Pipeline In-line Inspection Systems

5.2.2 Production-line Inspection Systems

5.2.3 Robotic MFL Inspection Systems

5.2.4 Other Specialized Systems

5.3 Market Segment by Type

5.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production by Type (2021-2032)

5.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Type (2021-2032)

5.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY MAGNETIZATION DIRECTION

6.1 World Automated Magnetic Flux Leakage Inspection Systems Market Size Overview by Magnetization Direction: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Magnetization Direction

6.2.1 Axial MFL

6.2.2 Circumferential MFL

6.2.3 Transverse MFL

6.2.4 Spiral MFL

6.2.5 Other Magnetization Directions

6.3 Market Segment by Magnetization Direction

6.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production by Magnetization Direction (2021-2032)

6.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Magnetization Direction (2021-2032)

6.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Magnetization Direction (2021-2032)

7 MARKET ANALYSIS BY EXCITATION METHOD

7.1 World Automated Magnetic Flux Leakage Inspection Systems Market Size Overview by Excitation Method: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Excitation Method

7.2.1 Permanent Magnet Excitation

7.2.2 DC Electromagnetic Excitation

7.2.3 AC Electromagnetic Excitation

7.2.4 Other Excitation Methods

7.3 Market Segment by Excitation Method

7.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production by Excitation Method (2021-2032)

7.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Excitation Method (2021-2032)

7.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Excitation Method (2021-2032)

8 MARKET ANALYSIS BY LEVEL OF AUTOMATION

8.1 World Automated Magnetic Flux Leakage Inspection Systems Market Size Overview by Level of Automation: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Level of Automation

8.2.1 Fully Automated Systems

8.2.2 Semi-automated Systems

8.2.3 Other

8.3 Market Segment by Level of Automation

8.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production by Level of Automation (2021-2032)

8.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Level of Automation (2021-2032)

8.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Level of Automation (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Automated Magnetic Flux Leakage Inspection Systems Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Pipeline Corrosion Inspection

9.2.2 Storage Tank Floor Inspection

9.2.3 Wire Rope and Cable Inspection

9.2.4 Other Component Inspection

9.3 Market Segment by Application

9.3.1 World Automated Magnetic Flux Leakage Inspection Systems Production by Application (2021-2032)

9.3.2 World Automated Magnetic Flux Leakage Inspection Systems Production Value by Application (2021-2032)

9.3.3 World Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Baker Hughes Company

10.1.1 Baker Hughes Company Details

10.1.2 Baker Hughes Company Major Business

10.1.3 Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.1.4 Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Baker Hughes Company Recent Developments/Updates

10.1.6 Baker Hughes Company Competitive Strengths & Weaknesses

10.2 ROSEN Group

10.2.1 ROSEN Group Details

10.2.2 ROSEN Group Major Business

10.2.3 ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.2.4 ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 ROSEN Group Recent Developments/Updates

10.2.6 ROSEN Group Competitive Strengths & Weaknesses

10.3 T.D. Williamson, Inc.

10.3.1 T.D. Williamson, Inc. Details

10.3.2 T.D. Williamson, Inc. Major Business

10.3.3 T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.3.4 T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 T.D. Williamson, Inc. Recent Developments/Updates

10.3.6 T.D. Williamson, Inc. Competitive Strengths & Weaknesses

10.4 NDT Global GmbH

10.4.1 NDT Global GmbH Details

10.4.2 NDT Global GmbH Major Business

10.4.3 NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.4.4 NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 NDT Global GmbH Recent Developments/Updates

10.4.6 NDT Global GmbH Competitive Strengths & Weaknesses

10.5 PJSC Transneft

10.5.1 PJSC Transneft Details

10.5.2 PJSC Transneft Major Business

10.5.3 PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.5.4 PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 PJSC Transneft Recent Developments/Updates

10.5.6 PJSC Transneft Competitive Strengths & Weaknesses

10.6 Quanta Services, Inc.

10.6.1 Quanta Services, Inc. Details

10.6.2 Quanta Services, Inc. Major Business

10.6.3 Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.6.4 Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.6.5 Quanta Services, Inc. Recent Developments/Updates

10.6.6 Quanta Services, Inc. Competitive Strengths & Weaknesses

10.7 MISTRAS Group, Inc.

10.7.1 MISTRAS Group, Inc. Details

10.7.2 MISTRAS Group, Inc. Major Business

10.7.3 MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.7.4 MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.7.5 MISTRAS Group, Inc. Recent Developments/Updates

10.7.6 MISTRAS Group, Inc. Competitive Strengths & Weaknesses

10.8 ESAB Corporation

10.8.1 ESAB Corporation Details

10.8.2 ESAB Corporation Major Business

10.8.3 ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.8.4 ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.8.5 ESAB Corporation Recent Developments/Updates

10.8.6 ESAB Corporation Competitive Strengths & Weaknesses

10.9 Intertek Group plc

10.9.1 Intertek Group plc Details

10.9.2 Intertek Group plc Major Business

10.9.3 Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.9.4 Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.9.5 Intertek Group plc Recent Developments/Updates

10.9.6 Intertek Group plc Competitive Strengths & Weaknesses

10.10 PIPECARE Group AG

10.10.1 PIPECARE Group AG Details

10.10.2 PIPECARE Group AG Major Business

10.10.3 PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.10.4 PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 PIPECARE Group AG Recent Developments/Updates

10.10.6 PIPECARE Group AG Competitive Strengths & Weaknesses

10.11 Institut Dr. Foerster GmbH & Co. KG

10.11.1 Institut Dr. Foerster GmbH & Co. KG Details

10.11.2 Institut Dr. Foerster GmbH & Co. KG Major Business

10.11.3 Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.11.4 Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 Institut Dr. Foerster GmbH & Co. KG Recent Developments/Updates

10.11.6 Institut Dr. Foerster GmbH & Co. KG Competitive Strengths & Weaknesses

10.12 Magnetic Analysis Corporation

10.12.1 Magnetic Analysis Corporation Details

10.12.2 Magnetic Analysis Corporation Major Business

10.12.3 Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.12.4 Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 Magnetic Analysis Corporation Recent Developments/Updates

10.12.6 Magnetic Analysis Corporation Competitive Strengths & Weaknesses

10.13 TÜV NORD GROUP

10.13.1 TÜV NORD GROUP Details

10.13.2 TÜV NORD GROUP Major Business

10.13.3 TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.13.4 TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 TÜV NORD GROUP Recent Developments/Updates

10.13.6 TÜV NORD GROUP Competitive Strengths & Weaknesses

10.14 Enduro Pipeline Services, Inc.

10.14.1 Enduro Pipeline Services, Inc. Details

10.14.2 Enduro Pipeline Services, Inc. Major Business

10.14.3 Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.14.4 Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.14.5 Enduro Pipeline Services, Inc. Recent Developments/Updates

10.14.6 Enduro Pipeline Services, Inc. Competitive Strengths & Weaknesses

10.15 3P Services GmbH & Co. KG

10.15.1 3P Services GmbH & Co. KG Details

- 10.15.2 3P Services GmbH & Co. KG Major Business
- 10.15.3 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 10.15.4 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.15.5 3P Services GmbH & Co. KG Recent Developments/Updates
- 10.15.6 3P Services GmbH & Co. KG Competitive Strengths & Weaknesses
- 10.16 Intero Integrity Services B.V.
- 10.16.1 Intero Integrity Services B.V. Details
- 10.16.2 Intero Integrity Services B.V. Major Business
- 10.16.3 Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 10.16.4 Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.16.5 Intero Integrity Services B.V. Recent Developments/Updates
- 10.16.6 Intero Integrity Services B.V. Competitive Strengths & Weaknesses
- 10.17 Diakont
- 10.17.1 Diakont Details
- 10.17.2 Diakont Major Business
- 10.17.3 Diakont Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 10.17.4 Diakont Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.17.5 Diakont Recent Developments/Updates
- 10.17.6 Diakont Competitive Strengths & Weaknesses
- 10.18 DEXON Technology Public Company Limited
- 10.18.1 DEXON Technology Public Company Limited Details
- 10.18.2 DEXON Technology Public Company Limited Major Business
- 10.18.3 DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 10.18.4 DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.18.5 DEXON Technology Public Company Limited Recent Developments/Updates
- 10.18.6 DEXON Technology Public Company Limited Competitive Strengths & Weaknesses
- 10.19 MFE Enterprises, Inc.
- 10.19.1 MFE Enterprises, Inc. Details
- 10.19.2 MFE Enterprises, Inc. Major Business

10.19.3 MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.19.4 MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.19.5 MFE Enterprises, Inc. Recent Developments/Updates

10.19.6 MFE Enterprises, Inc. Competitive Strengths & Weaknesses

10.20 IP Pipeline Technology Co., Ltd.

10.20.1 IP Pipeline Technology Co., Ltd. Details

10.20.2 IP Pipeline Technology Co., Ltd. Major Business

10.20.3 IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.20.4 IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 IP Pipeline Technology Co., Ltd. Recent Developments/Updates

10.20.6 IP Pipeline Technology Co., Ltd. Competitive Strengths & Weaknesses

10.21 China Petroleum Pipeline Inspection Technology Co., Ltd.

10.21.1 China Petroleum Pipeline Inspection Technology Co., Ltd. Details

10.21.2 China Petroleum Pipeline Inspection Technology Co., Ltd. Major Business

10.21.3 China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.21.4 China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.21.5 China Petroleum Pipeline Inspection Technology Co., Ltd. Recent Developments/Updates

10.21.6 China Petroleum Pipeline Inspection Technology Co., Ltd. Competitive Strengths & Weaknesses

10.22 Shenyang Institute of Instrumentation Science Co., Ltd.

10.22.1 Shenyang Institute of Instrumentation Science Co., Ltd. Details

10.22.2 Shenyang Institute of Instrumentation Science Co., Ltd. Major Business

10.22.3 Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.22.4 Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Shenyang Institute of Instrumentation Science Co., Ltd. Recent Developments/Updates

10.22.6 Shenyang Institute of Instrumentation Science Co., Ltd. Competitive Strengths

& Weaknesses

10.23 Chengdu Xiongggu Jiashi Dianqi Co., Ltd.

10.23.1 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Details

10.23.2 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Major Business

10.23.3 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.23.4 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.23.5 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Recent Developments/Updates

10.23.6 Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Competitive Strengths & Weaknesses

10.24 LIN SCAN Advanced Pipelines & Tanks Services

10.24.1 LIN SCAN Advanced Pipelines & Tanks Services Details

10.24.2 LIN SCAN Advanced Pipelines & Tanks Services Major Business

10.24.3 LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.24.4 LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.24.5 LIN SCAN Advanced Pipelines & Tanks Services Recent Developments/Updates

10.24.6 LIN SCAN Advanced Pipelines & Tanks Services Competitive Strengths & Weaknesses

10.25 Romstar Sdn Bhd

10.25.1 Romstar Sdn Bhd Details

10.25.2 Romstar Sdn Bhd Major Business

10.25.3 Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.25.4 Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.25.5 Romstar Sdn Bhd Recent Developments/Updates

10.25.6 Romstar Sdn Bhd Competitive Strengths & Weaknesses

10.26 GeoCorr LLC

10.26.1 GeoCorr LLC Details

10.26.2 GeoCorr LLC Major Business

10.26.3 GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.26.4 GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.26.5 GeoCorr LLC Recent Developments/Updates

10.26.6 GeoCorr LLC Competitive Strengths & Weaknesses

10.27 Pipesurvey International C.V.

10.27.1 Pipesurvey International C.V. Details

10.27.2 Pipesurvey International C.V. Major Business

10.27.3 Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.27.4 Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.27.5 Pipesurvey International C.V. Recent Developments/Updates

10.27.6 Pipesurvey International C.V. Competitive Strengths & Weaknesses

10.28 Baugh & Weedon Ltd

10.28.1 Baugh & Weedon Ltd Details

10.28.2 Baugh & Weedon Ltd Major Business

10.28.3 Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.28.4 Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.28.5 Baugh & Weedon Ltd Recent Developments/Updates

10.28.6 Baugh & Weedon Ltd Competitive Strengths & Weaknesses

10.29 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD.

10.29.1 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Details

10.29.2 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Major Business

10.29.3 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.29.4 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.29.5 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Recent Developments/Updates

10.29.6 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Competitive Strengths & Weaknesses

10.30 UPP Pipeline Services Ltd.

10.30.1 UPP Pipeline Services Ltd. Details

10.30.2 UPP Pipeline Services Ltd. Major Business

10.30.3 UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

10.30.4 UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection

Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.30.5 UPP Pipeline Services Ltd. Recent Developments/Updates

10.30.6 UPP Pipeline Services Ltd. Competitive Strengths & Weaknesses

10.31 KMAX Inspection LLC

10.31.1 KMAX Inspection LLC Details

10.31.2 KMAX Inspection LLC Major Business

10.31.3 KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems
Product and Services

10.31.4 KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems
Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.31.5 KMAX Inspection LLC Recent Developments/Updates

10.31.6 KMAX Inspection LLC Competitive Strengths & Weaknesses

10.32 Wuhan HYEM Testing Equipment Co., Ltd.

10.32.1 Wuhan HYEM Testing Equipment Co., Ltd. Details

10.32.2 Wuhan HYEM Testing Equipment Co., Ltd. Major Business

10.32.3 Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage
Inspection Systems Product and Services

10.32.4 Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage
Inspection Systems Production, Price, Value, Gross Margin and Market Share
(2021-2026)

10.32.5 Wuhan HYEM Testing Equipment Co., Ltd. Recent Developments/Updates

10.32.6 Wuhan HYEM Testing Equipment Co., Ltd. Competitive Strengths &
Weaknesses

10.33 NDT Technologies, LLC

10.33.1 NDT Technologies, LLC Details

10.33.2 NDT Technologies, LLC Major Business

10.33.3 NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection
Systems Product and Services

10.33.4 NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection
Systems Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.33.5 NDT Technologies, LLC Recent Developments/Updates

10.33.6 NDT Technologies, LLC Competitive Strengths & Weaknesses

10.34 INTRON PLUS

10.34.1 INTRON PLUS Details

10.34.2 INTRON PLUS Major Business

10.34.3 INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems
Product and Services

10.34.4 INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems
Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.34.5 INTRON PLUS Recent Developments/Updates

10.34.6 INTRON PLUS Competitive Strengths & Weaknesses

10.35 ROPESYS GmbH

10.35.1 ROPESYS GmbH Details

10.35.2 ROPESYS GmbH Major Business

10.35.3 ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.35.4 ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.35.5 ROPESYS GmbH Recent Developments/Updates

10.35.6 ROPESYS GmbH Competitive Strengths & Weaknesses

10.36 LRM-NDE Laboratory

10.36.1 LRM-NDE Laboratory Details

10.36.2 LRM-NDE Laboratory Major Business

10.36.3 LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems

Product and Services

10.36.4 LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.36.5 LRM-NDE Laboratory Recent Developments/Updates

10.36.6 LRM-NDE Laboratory Competitive Strengths & Weaknesses

List Of Tables

LIST OF TABLES

Table 1. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share by Region (2021-2026)

Table 5. World Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share by Region (2027-2032)

Table 6. World Automated Magnetic Flux Leakage Inspection Systems Production by Region (2021-2026) & (Units)

Table 7. World Automated Magnetic Flux Leakage Inspection Systems Production by Region (2027-2032) & (Units)

Table 8. World Automated Magnetic Flux Leakage Inspection Systems Production Market Share by Region (2021-2026)

Table 9. World Automated Magnetic Flux Leakage Inspection Systems Production Market Share by Region (2027-2032)

Table 10. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Automated Magnetic Flux Leakage Inspection Systems Major Market Trends

Table 13. World Automated Magnetic Flux Leakage Inspection Systems Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Automated Magnetic Flux Leakage Inspection Systems Consumption by Region (2021-2026) & (Units)

Table 15. World Automated Magnetic Flux Leakage Inspection Systems Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automated Magnetic Flux Leakage Inspection Systems Producers in 2025

Table 18. World Automated Magnetic Flux Leakage Inspection Systems Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Automated Magnetic Flux Leakage Inspection Systems Producers in 2025

Table 20. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Automated Magnetic Flux Leakage Inspection Systems Company Evaluation Quadrant

Table 22. World Automated Magnetic Flux Leakage Inspection Systems Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automated Magnetic Flux Leakage Inspection Systems Production Site of Key Manufacturer

Table 24. Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Type Footprint

Table 25. Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Application Footprint

Table 26. Automated Magnetic Flux Leakage Inspection Systems Competitive Factors

Table 27. Automated Magnetic Flux Leakage Inspection Systems New Entrant and Capacity Expansion Plans

Table 28. Automated Magnetic Flux Leakage Inspection Systems Mergers & Acquisitions Activity

Table 29. United States VS China Automated Magnetic Flux Leakage Inspection Systems Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automated Magnetic Flux Leakage Inspection Systems Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Automated Magnetic Flux Leakage Inspection Systems Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Market Share (2021-2026)

Table 37. China Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Market Share (2021-2026)

Table 42. Rest of World Based Automated Magnetic Flux Leakage Inspection Systems Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Automated Magnetic Flux Leakage Inspection Systems Production Market Share (2021-2026)

Table 47. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Automated Magnetic Flux Leakage Inspection Systems Production by Type (2021-2026) & (Units)

Table 49. World Automated Magnetic Flux Leakage Inspection Systems Production by Type (2027-2032) & (Units)

Table 50. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Type (2021-2026) & (USD Million)

Table 51. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Type (2027-2032) & (USD Million)

Table 52. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Magnetization Direction, (USD Million), 2021 & 2025 & 2032

Table 55. World Automated Magnetic Flux Leakage Inspection Systems Production by Magnetization Direction (2021-2026) & (Units)

Table 56. World Automated Magnetic Flux Leakage Inspection Systems Production by Magnetization Direction (2027-2032) & (Units)

Table 57. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Magnetization Direction (2021-2026) & (USD Million)

Table 58. World Automated Magnetic Flux Leakage Inspection Systems Production

Value by Magnetization Direction (2027-2032) & (USD Million)

Table 59. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Magnetization Direction (2021-2026) & (US\$/Unit)

Table 60. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Magnetization Direction (2027-2032) & (US\$/Unit)

Table 61. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Excitation Method, (USD Million), 2021 & 2025 & 2032

Table 62. World Automated Magnetic Flux Leakage Inspection Systems Production by Excitation Method (2021-2026) & (Units)

Table 63. World Automated Magnetic Flux Leakage Inspection Systems Production by Excitation Method (2027-2032) & (Units)

Table 64. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Excitation Method (2021-2026) & (USD Million)

Table 65. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Excitation Method (2027-2032) & (USD Million)

Table 66. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Excitation Method (2021-2026) & (US\$/Unit)

Table 67. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Excitation Method (2027-2032) & (US\$/Unit)

Table 68. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Level of Automation, (USD Million), 2021 & 2025 & 2032

Table 69. World Automated Magnetic Flux Leakage Inspection Systems Production by Level of Automation (2021-2026) & (Units)

Table 70. World Automated Magnetic Flux Leakage Inspection Systems Production by Level of Automation (2027-2032) & (Units)

Table 71. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Level of Automation (2021-2026) & (USD Million)

Table 72. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Level of Automation (2027-2032) & (USD Million)

Table 73. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Level of Automation (2021-2026) & (US\$/Unit)

Table 74. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Level of Automation (2027-2032) & (US\$/Unit)

Table 75. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Automated Magnetic Flux Leakage Inspection Systems Production by Application (2021-2026) & (Units)

Table 77. World Automated Magnetic Flux Leakage Inspection Systems Production by Application (2027-2032) & (Units)

Table 78. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Application (2021-2026) & (USD Million)

Table 79. World Automated Magnetic Flux Leakage Inspection Systems Production Value by Application (2027-2032) & (USD Million)

Table 80. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2021-2026) & (US\$/Unit)

Table 81. World Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2027-2032) & (US\$/Unit)

Table 82. Baker Hughes Company Basic Information, Manufacturing Base and Competitors

Table 83. Baker Hughes Company Major Business

Table 84. Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 85. Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Baker Hughes Company Recent Developments/Updates

Table 87. Baker Hughes Company Competitive Strengths & Weaknesses

Table 88. ROSEN Group Basic Information, Manufacturing Base and Competitors

Table 89. ROSEN Group Major Business

Table 90. ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 91. ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. ROSEN Group Recent Developments/Updates

Table 93. ROSEN Group Competitive Strengths & Weaknesses

Table 94. T.D. Williamson, Inc. Basic Information, Manufacturing Base and Competitors

Table 95. T.D. Williamson, Inc. Major Business

Table 96. T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 97. T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. T.D. Williamson, Inc. Recent Developments/Updates

Table 99. T.D. Williamson, Inc. Competitive Strengths & Weaknesses

Table 100. NDT Global GmbH Basic Information, Manufacturing Base and Competitors

Table 101. NDT Global GmbH Major Business

Table 102. NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems

Product and Services

Table 103. NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. NDT Global GmbH Recent Developments/Updates

Table 105. NDT Global GmbH Competitive Strengths & Weaknesses

Table 106. PJSC Transneft Basic Information, Manufacturing Base and Competitors

Table 107. PJSC Transneft Major Business

Table 108. PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 109. PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. PJSC Transneft Recent Developments/Updates

Table 111. PJSC Transneft Competitive Strengths & Weaknesses

Table 112. Quanta Services, Inc. Basic Information, Manufacturing Base and Competitors

Table 113. Quanta Services, Inc. Major Business

Table 114. Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 115. Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Quanta Services, Inc. Recent Developments/Updates

Table 117. Quanta Services, Inc. Competitive Strengths & Weaknesses

Table 118. MISTRAS Group, Inc. Basic Information, Manufacturing Base and Competitors

Table 119. MISTRAS Group, Inc. Major Business

Table 120. MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 121. MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. MISTRAS Group, Inc. Recent Developments/Updates

Table 123. MISTRAS Group, Inc. Competitive Strengths & Weaknesses

Table 124. ESAB Corporation Basic Information, Manufacturing Base and Competitors

Table 125. ESAB Corporation Major Business

Table 126. ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 127. ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. ESAB Corporation Recent Developments/Updates

Table 129. ESAB Corporation Competitive Strengths & Weaknesses

Table 130. Intertek Group plc Basic Information, Manufacturing Base and Competitors

Table 131. Intertek Group plc Major Business

Table 132. Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 133. Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Intertek Group plc Recent Developments/Updates

Table 135. Intertek Group plc Competitive Strengths & Weaknesses

Table 136. PIPECARE Group AG Basic Information, Manufacturing Base and Competitors

Table 137. PIPECARE Group AG Major Business

Table 138. PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 139. PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. PIPECARE Group AG Recent Developments/Updates

Table 141. PIPECARE Group AG Competitive Strengths & Weaknesses

Table 142. Institut Dr. Foerster GmbH & Co. KG Basic Information, Manufacturing Base and Competitors

Table 143. Institut Dr. Foerster GmbH & Co. KG Major Business

Table 144. Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 145. Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Institut Dr. Foerster GmbH & Co. KG Recent Developments/Updates

Table 147. Institut Dr. Foerster GmbH & Co. KG Competitive Strengths & Weaknesses

Table 148. Magnetic Analysis Corporation Basic Information, Manufacturing Base and Competitors

Table 149. Magnetic Analysis Corporation Major Business

Table 150. Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 151. Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Magnetic Analysis Corporation Recent Developments/Updates

Table 153. Magnetic Analysis Corporation Competitive Strengths & Weaknesses

Table 154. TÜV NORD GROUP Basic Information, Manufacturing Base and Competitors

Table 155. TÜV NORD GROUP Major Business

Table 156. TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 157. TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. TÜV NORD GROUP Recent Developments/Updates

Table 159. TÜV NORD GROUP Competitive Strengths & Weaknesses

Table 160. Enduro Pipeline Services, Inc. Basic Information, Manufacturing Base and Competitors

Table 161. Enduro Pipeline Services, Inc. Major Business

Table 162. Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 163. Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Enduro Pipeline Services, Inc. Recent Developments/Updates

Table 165. Enduro Pipeline Services, Inc. Competitive Strengths & Weaknesses

Table 166. 3P Services GmbH & Co. KG Basic Information, Manufacturing Base and Competitors

Table 167. 3P Services GmbH & Co. KG Major Business

Table 168. 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 169. 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. 3P Services GmbH & Co. KG Recent Developments/Updates

Table 171. 3P Services GmbH & Co. KG Competitive Strengths & Weaknesses

Table 172. Intero Integrity Services B.V. Basic Information, Manufacturing Base and Competitors

Table 173. Intero Integrity Services B.V. Major Business

Table 174. Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection

Systems Product and Services

Table 175. Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Intero Integrity Services B.V. Recent Developments/Updates

Table 177. Intero Integrity Services B.V. Competitive Strengths & Weaknesses

Table 178. Diakont Basic Information, Manufacturing Base and Competitors

Table 179. Diakont Major Business

Table 180. Diakont Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 181. Diakont Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Diakont Recent Developments/Updates

Table 183. Diakont Competitive Strengths & Weaknesses

Table 184. DEXON Technology Public Company Limited Basic Information, Manufacturing Base and Competitors

Table 185. DEXON Technology Public Company Limited Major Business

Table 186. DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 187. DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. DEXON Technology Public Company Limited Recent Developments/Updates

Table 189. DEXON Technology Public Company Limited Competitive Strengths & Weaknesses

Table 190. MFE Enterprises, Inc. Basic Information, Manufacturing Base and Competitors

Table 191. MFE Enterprises, Inc. Major Business

Table 192. MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 193. MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. MFE Enterprises, Inc. Recent Developments/Updates

Table 195. MFE Enterprises, Inc. Competitive Strengths & Weaknesses

Table 196. IP Pipeline Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 197. IP Pipeline Technology Co., Ltd. Major Business

Table 198. IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 199. IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. IP Pipeline Technology Co., Ltd. Recent Developments/Updates

Table 201. IP Pipeline Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 202. China Petroleum Pipeline Inspection Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 203. China Petroleum Pipeline Inspection Technology Co., Ltd. Major Business

Table 204. China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 205. China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 206. China Petroleum Pipeline Inspection Technology Co., Ltd. Recent Developments/Updates

Table 207. China Petroleum Pipeline Inspection Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 208. Shenyang Institute of Instrumentation Science Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 209. Shenyang Institute of Instrumentation Science Co., Ltd. Major Business

Table 210. Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 211. Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Shenyang Institute of Instrumentation Science Co., Ltd. Recent Developments/Updates

Table 213. Shenyang Institute of Instrumentation Science Co., Ltd. Competitive Strengths & Weaknesses

Table 214. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 215. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Major Business

Table 216. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 217. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD

Million), Gross Margin and Market Share (2021-2026)

Table 218. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Recent Developments/Updates

Table 219. Chengdu Xionggui Jiashi Dianqi Co., Ltd. Competitive Strengths & Weaknesses

Table 220. LIN SCAN Advanced Pipelines & Tanks Services Basic Information, Manufacturing Base and Competitors

Table 221. LIN SCAN Advanced Pipelines & Tanks Services Major Business

Table 222. LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 223. LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 224. LIN SCAN Advanced Pipelines & Tanks Services Recent Developments/Updates

Table 225. LIN SCAN Advanced Pipelines & Tanks Services Competitive Strengths & Weaknesses

Table 226. Romstar Sdn Bhd Basic Information, Manufacturing Base and Competitors

Table 227. Romstar Sdn Bhd Major Business

Table 228. Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 229. Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 230. Romstar Sdn Bhd Recent Developments/Updates

Table 231. Romstar Sdn Bhd Competitive Strengths & Weaknesses

Table 232. GeoCorr LLC Basic Information, Manufacturing Base and Competitors

Table 233. GeoCorr LLC Major Business

Table 234. GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 235. GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 236. GeoCorr LLC Recent Developments/Updates

Table 237. GeoCorr LLC Competitive Strengths & Weaknesses

Table 238. Pipesurvey International C.V. Basic Information, Manufacturing Base and Competitors

Table 239. Pipesurvey International C.V. Major Business

Table 240. Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 241. Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 242. Pipesurvey International C.V. Recent Developments/Updates

Table 243. Pipesurvey International C.V. Competitive Strengths & Weaknesses

Table 244. Baugh & Weedon Ltd Basic Information, Manufacturing Base and Competitors

Table 245. Baugh & Weedon Ltd Major Business

Table 246. Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 247. Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 248. Baugh & Weedon Ltd Recent Developments/Updates

Table 249. Baugh & Weedon Ltd Competitive Strengths & Weaknesses

Table 250. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 251. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Major Business

Table 252. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 253. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 254. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Recent Developments/Updates

Table 255. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Competitive Strengths & Weaknesses

Table 256. UPP Pipeline Services Ltd. Basic Information, Manufacturing Base and Competitors

Table 257. UPP Pipeline Services Ltd. Major Business

Table 258. UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 259. UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 260. UPP Pipeline Services Ltd. Recent Developments/Updates

Table 261. UPP Pipeline Services Ltd. Competitive Strengths & Weaknesses

Table 262. KMAX Inspection LLC Basic Information, Manufacturing Base and Competitors

Table 263. KMAX Inspection LLC Major Business

Table 264. KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 265. KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 266. KMAX Inspection LLC Recent Developments/Updates

Table 267. KMAX Inspection LLC Competitive Strengths & Weaknesses

Table 268. Wuhan HYEM Testing Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 269. Wuhan HYEM Testing Equipment Co., Ltd. Major Business

Table 270. Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 271. Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 272. Wuhan HYEM Testing Equipment Co., Ltd. Recent Developments/Updates

Table 273. Wuhan HYEM Testing Equipment Co., Ltd. Competitive Strengths & Weaknesses

Table 274. NDT Technologies, LLC Basic Information, Manufacturing Base and Competitors

Table 275. NDT Technologies, LLC Major Business

Table 276. NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 277. NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 278. NDT Technologies, LLC Recent Developments/Updates

Table 279. NDT Technologies, LLC Competitive Strengths & Weaknesses

Table 280. INTRON PLUS Basic Information, Manufacturing Base and Competitors

Table 281. INTRON PLUS Major Business

Table 282. INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 283. INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 284. INTRON PLUS Recent Developments/Updates

Table 285. INTRON PLUS Competitive Strengths & Weaknesses

Table 286. ROPESYS GmbH Basic Information, Manufacturing Base and Competitors

Table 287. ROPESYS GmbH Major Business

Table 288. ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 289. ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 290. ROPESYS GmbH Recent Developments/Updates

Table 291. ROPESYS GmbH Competitive Strengths & Weaknesses

Table 292. LRM-NDE Laboratory Basic Information, Manufacturing Base and Competitors

Table 293. LRM-NDE Laboratory Major Business

Table 294. LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 295. LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 296. LRM-NDE Laboratory Recent Developments/Updates

Table 297. LRM-NDE Laboratory Competitive Strengths & Weaknesses

Table 298. Chengdu Zhongchai Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 299. Chengdu Zhongchai Technology Co., Ltd. Major Business

Table 300. Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 301. Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 302. Chengdu Zhongchai Technology Co., Ltd. Recent Developments/Updates

Table 303. Chengdu Zhongchai Technology Co., Ltd. Competitive Strengths & Weaknesses

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