

Global Automated Magnetic Flux Leakage Inspection Systems 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 Automated Magnetic Flux Leakage Inspection Systems market size was valued at US\$ 986 million in 2025 and is forecast to a readjusted size of US\$ 1534 million by 2032 with a CAGR of 6.5% during review period.

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 is a detailed and comprehensive analysis for global Automated Magnetic Flux Leakage Inspection Systems 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 Automated Magnetic Flux Leakage Inspection Systems market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Automated Magnetic Flux Leakage Inspection Systems market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Automated Magnetic Flux Leakage Inspection Systems market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Automated Magnetic Flux Leakage Inspection Systems market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 Automated Magnetic Flux Leakage Inspection Systems
- 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 Automated Magnetic Flux Leakage Inspection Systems 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 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.

Automated Magnetic Flux Leakage Inspection Systems 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

Pipeline In-line Inspection Systems

Production-line Inspection Systems

Robotic MFL Inspection Systems

Other Specialized Systems

Market segment by Magnetization Direction

Axial MFL

Circumferential MFL

Transverse MFL

Spiral MFL

Other Magnetization Directions

Market segment by Excitation Method

Permanent Magnet Excitation

DC Electromagnetic Excitation

AC Electromagnetic Excitation

Other Excitation Methods

Market segment by Level of Automation

Fully Automated Systems

Semi-automated Systems

Other

Market segment by Application

Pipeline Corrosion Inspection

Storage Tank Floor Inspection

Wire Rope and Cable Inspection

Other Component Inspection

Major players covered

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 Xionggui 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.

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 Automated Magnetic Flux Leakage Inspection Systems product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automated Magnetic Flux Leakage Inspection Systems, with price, sales quantity, revenue, and global market share of Automated Magnetic Flux Leakage Inspection Systems from 2021 to 2026.

Chapter 3, the Automated Magnetic Flux Leakage Inspection Systems competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automated Magnetic Flux Leakage Inspection Systems 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 Automated Magnetic Flux Leakage Inspection Systems 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 Automated Magnetic Flux Leakage Inspection Systems.

Chapter 14 and 15, to describe Automated Magnetic Flux Leakage Inspection Systems sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Automated Magnetic Flux Leakage Inspection Systems
Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Pipeline In-line Inspection Systems

1.3.3 Production-line Inspection Systems

1.3.4 Robotic MFL Inspection Systems

1.3.5 Other Specialized Systems

1.4 Market Analysis by Magnetization Direction

1.4.1 Overview: Global Automated Magnetic Flux Leakage Inspection Systems
Consumption Value by Magnetization Direction: 2021 Versus 2025 Versus 2032

1.4.2 Axial MFL

1.4.3 Circumferential MFL

1.4.4 Transverse MFL

1.4.5 Spiral MFL

1.4.6 Other Magnetization Directions

1.5 Market Analysis by Excitation Method

1.5.1 Overview: Global Automated Magnetic Flux Leakage Inspection Systems
Consumption Value by Excitation Method: 2021 Versus 2025 Versus 2032

1.5.2 Permanent Magnet Excitation

1.5.3 DC Electromagnetic Excitation

1.5.4 AC Electromagnetic Excitation

1.5.5 Other Excitation Methods

1.6 Market Analysis by Level of Automation

1.6.1 Overview: Global Automated Magnetic Flux Leakage Inspection Systems
Consumption Value by Level of Automation: 2021 Versus 2025 Versus 2032

1.6.2 Fully Automated Systems

1.6.3 Semi-automated Systems

1.6.4 Other

1.7 Market Analysis by Application

1.7.1 Overview: Global Automated Magnetic Flux Leakage Inspection Systems
Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.7.2 Pipeline Corrosion Inspection

1.7.3 Storage Tank Floor Inspection

1.7.4 Wire Rope and Cable Inspection

1.7.5 Other Component Inspection

1.8 Global Automated Magnetic Flux Leakage Inspection Systems Market Size & Forecast

1.8.1 Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value (2021 & 2025 & 2032)

1.8.2 Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (2021-2032)

1.8.3 Global Automated Magnetic Flux Leakage Inspection Systems Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Baker Hughes Company

2.1.1 Baker Hughes Company Details

2.1.2 Baker Hughes Company Major Business

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

2.1.4 Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Baker Hughes Company Recent Developments/Updates

2.2 ROSEN Group

2.2.1 ROSEN Group Details

2.2.2 ROSEN Group Major Business

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

2.2.4 ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 ROSEN Group Recent Developments/Updates

2.3 T.D. Williamson, Inc.

2.3.1 T.D. Williamson, Inc. Details

2.3.2 T.D. Williamson, Inc. Major Business

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

2.3.4 T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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

2.4 NDT Global GmbH

2.4.1 NDT Global GmbH Details

2.4.2 NDT Global GmbH Major Business

2.4.3 NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems

Product and Services

2.4.4 NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 NDT Global GmbH Recent Developments/Updates

2.5 PJSC Transneft

2.5.1 PJSC Transneft Details

2.5.2 PJSC Transneft Major Business

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

2.5.4 PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 PJSC Transneft Recent Developments/Updates

2.6 Quanta Services, Inc.

2.6.1 Quanta Services, Inc. Details

2.6.2 Quanta Services, Inc. Major Business

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

2.6.4 Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Quanta Services, Inc. Recent Developments/Updates

2.7 MISTRAS Group, Inc.

2.7.1 MISTRAS Group, Inc. Details

2.7.2 MISTRAS Group, Inc. Major Business

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

2.7.4 MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 MISTRAS Group, Inc. Recent Developments/Updates

2.8 ESAB Corporation

2.8.1 ESAB Corporation Details

2.8.2 ESAB Corporation Major Business

2.8.3 ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.8.4 ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 ESAB Corporation Recent Developments/Updates

2.9 Intertek Group plc

- 2.9.1 Intertek Group plc Details
- 2.9.2 Intertek Group plc Major Business
- 2.9.3 Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.9.4 Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.9.5 Intertek Group plc Recent Developments/Updates
- 2.10 PIPECARE Group AG
- 2.10.1 PIPECARE Group AG Details
- 2.10.2 PIPECARE Group AG Major Business
- 2.10.3 PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.10.4 PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.10.5 PIPECARE Group AG Recent Developments/Updates
- 2.11 Institut Dr. Foerster GmbH & Co. KG
- 2.11.1 Institut Dr. Foerster GmbH & Co. KG Details
- 2.11.2 Institut Dr. Foerster GmbH & Co. KG Major Business
- 2.11.3 Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.11.4 Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.11.5 Institut Dr. Foerster GmbH & Co. KG Recent Developments/Updates
- 2.12 Magnetic Analysis Corporation
- 2.12.1 Magnetic Analysis Corporation Details
- 2.12.2 Magnetic Analysis Corporation Major Business
- 2.12.3 Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.12.4 Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.12.5 Magnetic Analysis Corporation Recent Developments/Updates
- 2.13 TÜV NORD GROUP
- 2.13.1 TÜV NORD GROUP Details
- 2.13.2 TÜV NORD GROUP Major Business
- 2.13.3 TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.13.4 TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems

Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 TÜV NORD GROUP Recent Developments/Updates

2.14 Enduro Pipeline Services, Inc.

2.14.1 Enduro Pipeline Services, Inc. Details

2.14.2 Enduro Pipeline Services, Inc. Major Business

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

2.14.4 Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Enduro Pipeline Services, Inc. Recent Developments/Updates

2.15 3P Services GmbH & Co. KG

2.15.1 3P Services GmbH & Co. KG Details

2.15.2 3P Services GmbH & Co. KG Major Business

2.15.3 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.15.4 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 3P Services GmbH & Co. KG Recent Developments/Updates

2.16 Intero Integrity Services B.V.

2.16.1 Intero Integrity Services B.V. Details

2.16.2 Intero Integrity Services B.V. Major Business

2.16.3 Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.16.4 Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 Intero Integrity Services B.V. Recent Developments/Updates

2.17 Diakont

2.17.1 Diakont Details

2.17.2 Diakont Major Business

2.17.3 Diakont Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.17.4 Diakont Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 Diakont Recent Developments/Updates

2.18 DEXON Technology Public Company Limited

2.18.1 DEXON Technology Public Company Limited Details

- 2.18.2 DEXON Technology Public Company Limited Major Business
- 2.18.3 DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.18.4 DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.18.5 DEXON Technology Public Company Limited Recent Developments/Updates
- 2.19 MFE Enterprises, Inc.
 - 2.19.1 MFE Enterprises, Inc. Details
 - 2.19.2 MFE Enterprises, Inc. Major Business
 - 2.19.3 MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.19.4 MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.19.5 MFE Enterprises, Inc. Recent Developments/Updates
- 2.20 IP Pipeline Technology Co., Ltd.
 - 2.20.1 IP Pipeline Technology Co., Ltd. Details
 - 2.20.2 IP Pipeline Technology Co., Ltd. Major Business
 - 2.20.3 IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.20.4 IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.20.5 IP Pipeline Technology Co., Ltd. Recent Developments/Updates
- 2.21 China Petroleum Pipeline Inspection Technology Co., Ltd.
 - 2.21.1 China Petroleum Pipeline Inspection Technology Co., Ltd. Details
 - 2.21.2 China Petroleum Pipeline Inspection Technology Co., Ltd. Major Business
 - 2.21.3 China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.21.4 China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.21.5 China Petroleum Pipeline Inspection Technology Co., Ltd. Recent Developments/Updates
- 2.22 Shenyang Institute of Instrumentation Science Co., Ltd.
 - 2.22.1 Shenyang Institute of Instrumentation Science Co., Ltd. Details
 - 2.22.2 Shenyang Institute of Instrumentation Science Co., Ltd. Major Business
 - 2.22.3 Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.22.4 Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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

2.23 Chengdu Xionggui Jiashi Dianqi Co., Ltd.

2.23.1 Chengdu Xionggui Jiashi Dianqi Co., Ltd. Details

2.23.2 Chengdu Xionggui Jiashi Dianqi Co., Ltd. Major Business

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

2.23.4 Chengdu Xionggui Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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

2.24 LIN SCAN Advanced Pipelines & Tanks Services

2.24.1 LIN SCAN Advanced Pipelines & Tanks Services Details

2.24.2 LIN SCAN Advanced Pipelines & Tanks Services Major Business

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

2.24.4 LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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

2.25 Romstar Sdn Bhd

2.25.1 Romstar Sdn Bhd Details

2.25.2 Romstar Sdn Bhd Major Business

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

2.25.4 Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 Romstar Sdn Bhd Recent Developments/Updates

2.26 GeoCorr LLC

2.26.1 GeoCorr LLC Details

2.26.2 GeoCorr LLC Major Business

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

2.26.4 GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.26.5 GeoCorr LLC Recent Developments/Updates
- 2.27 Pipesurvey International C.V.
 - 2.27.1 Pipesurvey International C.V. Details
 - 2.27.2 Pipesurvey International C.V. Major Business
 - 2.27.3 Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.27.4 Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.27.5 Pipesurvey International C.V. Recent Developments/Updates
- 2.28 Baugh & Weedon Ltd
 - 2.28.1 Baugh & Weedon Ltd Details
 - 2.28.2 Baugh & Weedon Ltd Major Business
 - 2.28.3 Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.28.4 Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.28.5 Baugh & Weedon Ltd Recent Developments/Updates
- 2.29 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD.
 - 2.29.1 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Details
 - 2.29.2 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Major Business
 - 2.29.3 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.29.4 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.29.5 EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Recent Developments/Updates
- 2.30 UPP Pipeline Services Ltd.
 - 2.30.1 UPP Pipeline Services Ltd. Details
 - 2.30.2 UPP Pipeline Services Ltd. Major Business
 - 2.30.3 UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services
 - 2.30.4 UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.30.5 UPP Pipeline Services Ltd. Recent Developments/Updates
- 2.31 KMAX Inspection LLC
 - 2.31.1 KMAX Inspection LLC Details
 - 2.31.2 KMAX Inspection LLC Major Business

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

2.31.4 KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.31.5 KMAX Inspection LLC Recent Developments/Updates

2.32 Wuhan HYEM Testing Equipment Co., Ltd.

2.32.1 Wuhan HYEM Testing Equipment Co., Ltd. Details

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

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

2.32.4 Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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

2.33 NDT Technologies, LLC

2.33.1 NDT Technologies, LLC Details

2.33.2 NDT Technologies, LLC Major Business

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

2.33.4 NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.33.5 NDT Technologies, LLC Recent Developments/Updates

2.34 INTRON PLUS

2.34.1 INTRON PLUS Details

2.34.2 INTRON PLUS Major Business

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

2.34.4 INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.34.5 INTRON PLUS Recent Developments/Updates

2.35 ROPESYS GmbH

2.35.1 ROPESYS GmbH Details

2.35.2 ROPESYS GmbH Major Business

2.35.3 ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Product and Services

2.35.4 ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.35.5 ROPESYS GmbH Recent Developments/Updates

2.36 LRM-NDE Laboratory

- 2.36.1 LRM-NDE Laboratory Details
- 2.36.2 LRM-NDE Laboratory Major Business
- 2.36.3 LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.36.4 LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.36.5 LRM-NDE Laboratory Recent Developments/Updates
- 2.37 Chengdu Zhongchai Technology Co., Ltd.
- 2.37.1 Chengdu Zhongchai Technology Co., Ltd. Details
- 2.37.2 Chengdu Zhongchai Technology Co., Ltd. Major Business
- 2.37.3 Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services
- 2.37.4 Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.37.5 Chengdu Zhongchai Technology Co., Ltd. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: AUTOMATED MAGNETIC FLUX LEAKAGE INSPECTION SYSTEMS BY MANUFACTURER

- 3.1 Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Manufacturer (2021-2026)
- 3.3 Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Automated Magnetic Flux Leakage Inspection Systems by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Automated Magnetic Flux Leakage Inspection Systems Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Automated Magnetic Flux Leakage Inspection Systems Manufacturer Market Share in 2025
- 3.5 Automated Magnetic Flux Leakage Inspection Systems Market: Overall Company Footprint Analysis
 - 3.5.1 Automated Magnetic Flux Leakage Inspection Systems Market: Region Footprint
 - 3.5.2 Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Type Footprint
 - 3.5.3 Automated Magnetic Flux Leakage Inspection Systems Market: Company

Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Automated Magnetic Flux Leakage Inspection Systems Market Size by Region

4.1.1 Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2021-2032)

4.1.2 Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2021-2032)

4.1.3 Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2021-2032)

4.2 North America Automated Magnetic Flux Leakage Inspection Systems Consumption Value (2021-2032)

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

4.4 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Consumption Value (2021-2032)

4.5 South America Automated Magnetic Flux Leakage Inspection Systems Consumption Value (2021-2032)

4.6 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

5.2 Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Type (2021-2032)

5.3 Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

6.2 Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value

by Application (2021-2032)

6.3 Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

7.2 North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

7.3 North America Automated Magnetic Flux Leakage Inspection Systems Market Size by Country

7.3.1 North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2032)

7.3.2 North America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

8.2 Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

8.3 Europe Automated Magnetic Flux Leakage Inspection Systems Market Size by Country

8.3.1 Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2032)

8.3.2 Europe Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Market Size by Region

9.3.1 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

10.2 South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

10.3 South America Automated Magnetic Flux Leakage Inspection Systems Market Size by Country

10.3.1 South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2032)

10.3.2 South America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Market Size by Country

11.3.1 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Automated Magnetic Flux Leakage Inspection Systems Market Drivers

12.2 Automated Magnetic Flux Leakage Inspection Systems Market Restraints

12.3 Automated Magnetic Flux Leakage Inspection Systems Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Automated Magnetic Flux Leakage Inspection Systems and Key Manufacturers

13.2 Manufacturing Costs Percentage of Automated Magnetic Flux Leakage Inspection Systems

13.3 Automated Magnetic Flux Leakage Inspection Systems Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Automated Magnetic Flux Leakage Inspection Systems Typical Distributors

14.3 Automated Magnetic Flux Leakage Inspection Systems Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Magnetization Direction, (USD Million), 2021 & 2025 & 2032

Table 3. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Excitation Method, (USD Million), 2021 & 2025 & 2032

Table 4. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Level of Automation, (USD Million), 2021 & 2025 & 2032

Table 5. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 6. Baker Hughes Company Basic Information, Manufacturing Base and Competitors

Table 7. Baker Hughes Company Major Business

Table 8. Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 9. Baker Hughes Company Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 10. Baker Hughes Company Recent Developments/Updates

Table 11. ROSEN Group Basic Information, Manufacturing Base and Competitors

Table 12. ROSEN Group Major Business

Table 13. ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 14. ROSEN Group Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 15. ROSEN Group Recent Developments/Updates

Table 16. T.D. Williamson, Inc. Basic Information, Manufacturing Base and Competitors

Table 17. T.D. Williamson, Inc. Major Business

Table 18. T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 19. T.D. Williamson, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 20. T.D. Williamson, Inc. Recent Developments/Updates

Table 21. NDT Global GmbH Basic Information, Manufacturing Base and Competitors

Table 22. NDT Global GmbH Major Business

Table 23. NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 24. NDT Global GmbH Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 25. NDT Global GmbH Recent Developments/Updates

Table 26. PJSC Transneft Basic Information, Manufacturing Base and Competitors

Table 27. PJSC Transneft Major Business

Table 28. PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 29. PJSC Transneft Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 30. PJSC Transneft Recent Developments/Updates

Table 31. Quanta Services, Inc. Basic Information, Manufacturing Base and Competitors

Table 32. Quanta Services, Inc. Major Business

Table 33. Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 34. Quanta Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 35. Quanta Services, Inc. Recent Developments/Updates

Table 36. MISTRAS Group, Inc. Basic Information, Manufacturing Base and Competitors

Table 37. MISTRAS Group, Inc. Major Business

Table 38. MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 39. MISTRAS Group, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 40. MISTRAS Group, Inc. Recent Developments/Updates

Table 41. ESAB Corporation Basic Information, Manufacturing Base and Competitors

Table 42. ESAB Corporation Major Business

Table 43. ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 44. ESAB Corporation Automated Magnetic Flux Leakage Inspection Systems

Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 45. ESAB Corporation Recent Developments/Updates

Table 46. Intertek Group plc Basic Information, Manufacturing Base and Competitors

Table 47. Intertek Group plc Major Business

Table 48. Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 49. Intertek Group plc Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 50. Intertek Group plc Recent Developments/Updates

Table 51. PIPECARE Group AG Basic Information, Manufacturing Base and Competitors

Table 52. PIPECARE Group AG Major Business

Table 53. PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 54. PIPECARE Group AG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 55. PIPECARE Group AG Recent Developments/Updates

Table 56. Institut Dr. Foerster GmbH & Co. KG Basic Information, Manufacturing Base and Competitors

Table 57. Institut Dr. Foerster GmbH & Co. KG Major Business

Table 58. Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 59. Institut Dr. Foerster GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. Institut Dr. Foerster GmbH & Co. KG Recent Developments/Updates

Table 61. Magnetic Analysis Corporation Basic Information, Manufacturing Base and Competitors

Table 62. Magnetic Analysis Corporation Major Business

Table 63. Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 64. Magnetic Analysis Corporation Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. Magnetic Analysis Corporation Recent Developments/Updates

Table 66. TÜV NORD GROUP Basic Information, Manufacturing Base and Competitors

Table 67. TÜV NORD GROUP Major Business

Table 68. TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 69. TÜV NORD GROUP Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 70. TÜV NORD GROUP Recent Developments/Updates

Table 71. Enduro Pipeline Services, Inc. Basic Information, Manufacturing Base and Competitors

Table 72. Enduro Pipeline Services, Inc. Major Business

Table 73. Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 74. Enduro Pipeline Services, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 75. Enduro Pipeline Services, Inc. Recent Developments/Updates

Table 76. 3P Services GmbH & Co. KG Basic Information, Manufacturing Base and Competitors

Table 77. 3P Services GmbH & Co. KG Major Business

Table 78. 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 79. 3P Services GmbH & Co. KG Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 80. 3P Services GmbH & Co. KG Recent Developments/Updates

Table 81. Intero Integrity Services B.V. Basic Information, Manufacturing Base and Competitors

Table 82. Intero Integrity Services B.V. Major Business

Table 83. Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 84. Intero Integrity Services B.V. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Intero Integrity Services B.V. Recent Developments/Updates

Table 86. Diakont Basic Information, Manufacturing Base and Competitors

Table 87. Diakont Major Business

Table 88. Diakont Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 89. Diakont Automated Magnetic Flux Leakage Inspection Systems Sales

Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Diakont Recent Developments/Updates

Table 91. DEXON Technology Public Company Limited Basic Information, Manufacturing Base and Competitors

Table 92. DEXON Technology Public Company Limited Major Business

Table 93. DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 94. DEXON Technology Public Company Limited Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 95. DEXON Technology Public Company Limited Recent Developments/Updates

Table 96. MFE Enterprises, Inc. Basic Information, Manufacturing Base and Competitors

Table 97. MFE Enterprises, Inc. Major Business

Table 98. MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 99. MFE Enterprises, Inc. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 100. MFE Enterprises, Inc. Recent Developments/Updates

Table 101. IP Pipeline Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 102. IP Pipeline Technology Co., Ltd. Major Business

Table 103. IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 104. IP Pipeline Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 105. IP Pipeline Technology Co., Ltd. Recent Developments/Updates

Table 106. China Petroleum Pipeline Inspection Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 107. China Petroleum Pipeline Inspection Technology Co., Ltd. Major Business

Table 108. China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 109. China Petroleum Pipeline Inspection Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. China Petroleum Pipeline Inspection Technology Co., Ltd. Recent

Developments/Updates

Table 111. Shenyang Institute of Instrumentation Science Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 112. Shenyang Institute of Instrumentation Science Co., Ltd. Major Business

Table 113. Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 114. Shenyang Institute of Instrumentation Science Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Shenyang Institute of Instrumentation Science Co., Ltd. Recent Developments/Updates

Table 116. Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 117. Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Major Business

Table 118. Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 119. Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Chengdu Xiongggu Jiashi Dianqi Co., Ltd. Recent Developments/Updates

Table 121. LIN SCAN Advanced Pipelines & Tanks Services Basic Information, Manufacturing Base and Competitors

Table 122. LIN SCAN Advanced Pipelines & Tanks Services Major Business

Table 123. LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 124. LIN SCAN Advanced Pipelines & Tanks Services Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 125. LIN SCAN Advanced Pipelines & Tanks Services Recent Developments/Updates

Table 126. Romstar Sdn Bhd Basic Information, Manufacturing Base and Competitors

Table 127. Romstar Sdn Bhd Major Business

Table 128. Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 129. Romstar Sdn Bhd Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 130. Romstar Sdn Bhd Recent Developments/Updates

Table 131. GeoCorr LLC Basic Information, Manufacturing Base and Competitors

Table 132. GeoCorr LLC Major Business

Table 133. GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 134. GeoCorr LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 135. GeoCorr LLC Recent Developments/Updates

Table 136. Pipesurvey International C.V. Basic Information, Manufacturing Base and Competitors

Table 137. Pipesurvey International C.V. Major Business

Table 138. Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 139. Pipesurvey International C.V. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Pipesurvey International C.V. Recent Developments/Updates

Table 141. Baugh & Weedon Ltd Basic Information, Manufacturing Base and Competitors

Table 142. Baugh & Weedon Ltd Major Business

Table 143. Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 144. Baugh & Weedon Ltd Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Baugh & Weedon Ltd Recent Developments/Updates

Table 146. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 147. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Major Business

Table 148. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 149. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 150. EDDYSUN (XIAMEN) ELECTRONIC CO., LTD. Recent Developments/Updates

Table 151. UPP Pipeline Services Ltd. Basic Information, Manufacturing Base and Competitors

Table 152. UPP Pipeline Services Ltd. Major Business

Table 153. UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection

Systems Product and Services

Table 154. UPP Pipeline Services Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 155. UPP Pipeline Services Ltd. Recent Developments/Updates

Table 156. KMAX Inspection LLC Basic Information, Manufacturing Base and Competitors

Table 157. KMAX Inspection LLC Major Business

Table 158. KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 159. KMAX Inspection LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 160. KMAX Inspection LLC Recent Developments/Updates

Table 161. Wuhan HYEM Testing Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 162. Wuhan HYEM Testing Equipment Co., Ltd. Major Business

Table 163. Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 164. Wuhan HYEM Testing Equipment Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 165. Wuhan HYEM Testing Equipment Co., Ltd. Recent Developments/Updates

Table 166. NDT Technologies, LLC Basic Information, Manufacturing Base and Competitors

Table 167. NDT Technologies, LLC Major Business

Table 168. NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 169. NDT Technologies, LLC Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. NDT Technologies, LLC Recent Developments/Updates

Table 171. INTRON PLUS Basic Information, Manufacturing Base and Competitors

Table 172. INTRON PLUS Major Business

Table 173. INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 174. INTRON PLUS Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. INTRON PLUS Recent Developments/Updates

Table 176. ROPESYS GmbH Basic Information, Manufacturing Base and Competitors

Table 177. ROPESYS GmbH Major Business

Table 178. ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 179. ROPESYS GmbH Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 180. ROPESYS GmbH Recent Developments/Updates

Table 181. LRM-NDE Laboratory Basic Information, Manufacturing Base and Competitors

Table 182. LRM-NDE Laboratory Major Business

Table 183. LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 184. LRM-NDE Laboratory Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 185. LRM-NDE Laboratory Recent Developments/Updates

Table 186. Chengdu Zhongchai Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 187. Chengdu Zhongchai Technology Co., Ltd. Major Business

Table 188. Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Product and Services

Table 189. Chengdu Zhongchai Technology Co., Ltd. Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 190. Chengdu Zhongchai Technology Co., Ltd. Recent Developments/Updates

Table 191. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Manufacturer (2021-2026) & (Units)

Table 192. Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Manufacturer (2021-2026) & (USD Million)

Table 193. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 194. Market Position of Manufacturers in Automated Magnetic Flux Leakage Inspection Systems, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 195. Head Office and Automated Magnetic Flux Leakage Inspection Systems Production Site of Key Manufacturer

Table 196. Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Type Footprint

Table 197. Automated Magnetic Flux Leakage Inspection Systems Market: Company Product Application Footprint

Table 198. Automated Magnetic Flux Leakage Inspection Systems New Market Entrants and Barriers to Market Entry

Table 199. Automated Magnetic Flux Leakage Inspection Systems Mergers, Acquisition, Agreements, and Collaborations

Table 200. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 201. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2021-2026) & (Units)

Table 202. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2027-2032) & (Units)

Table 203. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2021-2026) & (USD Million)

Table 204. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2027-2032) & (USD Million)

Table 205. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2021-2026) & (US\$/Unit)

Table 206. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Region (2027-2032) & (US\$/Unit)

Table 207. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 208. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 209. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Type (2021-2026) & (USD Million)

Table 210. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Type (2027-2032) & (USD Million)

Table 211. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2021-2026) & (US\$/Unit)

Table 212. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Type (2027-2032) & (US\$/Unit)

Table 213. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 214. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 215. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Application (2021-2026) & (USD Million)

Table 216. Global Automated Magnetic Flux Leakage Inspection Systems Consumption

Value by Application (2027-2032) & (USD Million)

Table 217. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2021-2026) & (US\$/Unit)

Table 218. Global Automated Magnetic Flux Leakage Inspection Systems Average Price by Application (2027-2032) & (US\$/Unit)

Table 219. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 220. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 221. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 222. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 223. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2026) & (Units)

Table 224. North America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2027-2032) & (Units)

Table 225. North America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2026) & (USD Million)

Table 226. North America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2027-2032) & (USD Million)

Table 227. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 228. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 229. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 230. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 231. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2026) & (Units)

Table 232. Europe Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2027-2032) & (Units)

Table 233. Europe Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2026) & (USD Million)

Table 234. Europe Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2027-2032) & (USD Million)

Table 235. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 236. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 237. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 238. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 239. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2021-2026) & (Units)

Table 240. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Region (2027-2032) & (Units)

Table 241. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2021-2026) & (USD Million)

Table 242. Asia-Pacific Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Region (2027-2032) & (USD Million)

Table 243. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 244. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 245. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 246. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 247. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2021-2026) & (Units)

Table 248. South America Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Country (2027-2032) & (Units)

Table 249. South America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2021-2026) & (USD Million)

Table 250. South America Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Country (2027-2032) & (USD Million)

Table 251. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2021-2026) & (Units)

Table 252. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Type (2027-2032) & (Units)

Table 253. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2021-2026) & (Units)

Table 254. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems Sales Quantity by Application (2027-2032) & (Units)

Table 255. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems

Sales Quantity by Country (2021-2026) & (Units)

Table 256. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems

Sales Quantity by Country (2027-2032) & (Units)

Table 257. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems

Consumption Value by Country (2021-2026) & (USD Million)

Table 258. Middle East & Africa Automated Magnetic Flux Leakage Inspection Systems

Consumption Value by Country (2027-2032) & (USD Million)

Table 259. Automated Magnetic Flux Leakage Inspection Systems Raw Material

Table 260. Key Manufacturers of Automated Magnetic Flux Leakage Inspection
Systems Raw Materials

Table 261. Automated Magnetic Flux Leakage Inspection Systems Typical Distributors

Table 262. Automated Magnetic Flux Leakage Inspection Systems Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Automated Magnetic Flux Leakage Inspection Systems Picture

Figure 2. Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Type in 2025

Figure 4. Pipeline In-line Inspection Systems Examples

Figure 5. Production-line Inspection Systems Examples

Figure 6. Robotic MFL Inspection Systems Examples

Figure 7. Other Specialized Systems Examples

Figure 8. Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Magnetization Direction, (USD Million), 2021 & 2025 & 2032

Figure 9. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Magnetization Direction in 2025

Figure 10. Axial MFL Examples

Figure 11. Circumferential MFL Examples

Figure 12. Transverse MFL Examples

Figure 13. Spiral MFL Examples

Figure 14. Other Magnetization Directions Examples

Figure 15. Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Excitation Method, (USD Million), 2021 & 2025 & 2032

Figure 16. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Excitation Method in 2025

Figure 17. Permanent Magnet Excitation Examples

Figure 18. DC Electromagnetic Excitation Examples

Figure 19. AC Electromagnetic Excitation Examples

Figure 20. Other Excitation Methods Examples

Figure 21. Global Automated Magnetic Flux Leakage Inspection Systems Revenue by Level of Automation, (USD Million), 2021 & 2025 & 2032

Figure 22. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Level of Automation in 2025

Figure 23. Fully Automated Systems Examples

Figure 24. Semi-automated Systems Examples

Figure 25. Other Examples

Figure 26. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 27. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Application in 2025

Figure 28. Pipeline Corrosion Inspection Examples

Figure 29. Storage Tank Floor Inspection Examples

Figure 30. Wire Rope and Cable Inspection Examples

Figure 31. Other Component Inspection Examples

Figure 32. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 33. Global Automated Magnetic Flux Leakage Inspection Systems Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 34. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity (2021-2032) & (Units)

Figure 35. Global Automated Magnetic Flux Leakage Inspection Systems Price (2021-2032) & (US\$/Unit)

Figure 36. Global Automated Magnetic Flux Leakage Inspection Systems Sales Quantity Market Share by Manufacturer in 2025

Figure 37. Global Automated Magnetic Flux Leakage Inspection Systems Revenue Market Share by Manufacturer in 2025

Figure 38. Producer Shipments of Automated Magnetic Flux Leakage Inspection Systems by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 39. Top 3 Automated Magnetic Flux Leakage Inspection Systems Manufacturer (Revenue) Market Share in 2025

Figure 40. Top 6 Automated Magnetic Flux Leakage Inspection Systems Manufacturer (Revenue) Market Share in 2025

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