

# Global Electronics Industry X-ray Inspection Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Electronics Industry X-ray Inspection Equipment market size is expected to reach \$ 832 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

In 2025, global Electronics Industry X-ray Inspection Equipment production reached approximately 2,961 units, with an average global market price of around K US\$ 146.84 per unit.

X-ray inspection equipment can perform comprehensive inspection of PCBs, detecting defects not only on the surface but also internally. This inspection method is highly precise, capable of detecting minute defects and deformations, and is more reliable and accurate than traditional visual and mechanical inspection.

In the electronics manufacturing industry, X-ray inspection equipment has become a commonly used inspection tool. It can be applied to various types of PCBs, including single-layer, double-layer, and multi-layer PCBAs, as well as various types of electronic components such as chips, capacitors, and inductors. X-ray inspection equipment is also used in the assembly and repair of electronic products to ensure their quality and reliability.

Currently, AXI inspection technology is widely used in product inspection in industries such as lithium batteries, semiconductors, solar photovoltaics, integrated circuits, electronics manufacturing, PCBs, LEDs, and die castings.

In this report, Electronics Industry X-ray Inspection Equipment mainly refers to X-ray inspection equipment used in the PCB and semiconductor industries.

Electronics Industry X-ray Inspection Equipment comprises non-destructive inspection and quality-data systems used across electronics manufacturing (PCB/PCBA, semiconductor packaging/assembly, power modules, connectors, and precision devices). It combines an X-ray source (microfocus/high-power), high-resolution

detectors, precision motion and shielding, with 2D radiography, 2.5D tomosynthesis/laminography, and 3D CT reconstruction plus automated defect recognition and quantitative analytics. It addresses hidden internal defects that optical inspection cannot reliably judge, including solder voiding/insufficient solder, bridging, cracks and foreign materials in hidden joints (BGA/QFN/Flip-Chip), and registration/via-related issues in multilayer/HDI/substrate boards. As advanced packaging becomes miniaturized, stacked and high-density, CT capability, AI-assisted decisioning, and closed-loop traceability data increasingly form the foundation of high-reliability delivery. The dominant manufacturing model is ?modular platform + application-engineering delivery.? OEMs platformize the tube/detector/motion/shielding and industrial computing chain, then configure 2D/2.5D/3D CT and in-line/off-line deployment, build defect libraries and decision rules, and complete radiation safety and metrology calibration, process capability validation, and MES/QMS traceability integration. Leaders differentiate via software capability, faster NPI/delivery, and continual upgrades in imaging software and tube/detector technology.

Gross margin is commonly ~35%?55%, trending higher with CT capability, richer software/AI licensing, and higher service/spares penetration (industry estimate).

The value chain spans upstream components (X-ray tubes & HV, detectors, motion/shielding, industrial computing, reconstruction/AI), midstream system integration and inspection/SPC software plus service, and downstream PCB & SMT/EMS, semiconductor packaging/modules, automotive & EV power modules, consumer/comms manufacturing, and FA/3rd-party labs. Government programs accelerating electronics manufacturing digital transformation reinforce long-term demand for in-line inspection and data-driven traceability.

#### Market Development Opportunities & Drivers / Challenges & Risks / Downstream Demand Trends

Electronics manufacturing is entering a re-pricing cycle driven by high-density interconnect and high-reliability delivery. Brokerage research indicates AI servers add GPU board sets and raise bandwidth requirements, pushing PCB layer counts and manufacturing requirements upward; the cost of hidden defects rises accordingly, making X-ray inspection a process-critical quality infrastructure rather than a sampling tool. In parallel, advanced packaging formats (BGA/CSP/Flip-Chip/QFN) increasingly rely on hidden joint integrity, and research notes that defects beyond optical coverage require X-ray inspection, accelerating penetration of AXI/CT-type solutions in high-end electronics. Government targets for digital transformation and key-process automation further strengthen the long-term certainty of in-line inspection and end-to-end traceability investment.

Barriers are not limited to imaging hardware but extend to engineering industrialization and scalable delivery. Stable tubes/detectors and precision motion set the imaging

ceiling, demanding supply-chain consistency and rigorous reliability validation.

Meanwhile, 3D/CT reconstruction and automated judgment require high-quality labeled data and process priors, creating cold-start, misclassification, and maintenance costs when scaling across customers. Annual-report disclosures also show accelerated investment in software capability and tube/detector technology upgrades, alongside shorter development cycles?raising the bar for sustained R&D and organizational execution. Radiation safety, metrology, line-stop risk, and global service capability also materially affect purchasing decisions and acceptance cycles.

Demand is shifting from ?seeing defects? to ?quantifying defects and closing the loop.? In-line, 2D remains essential for throughput screening, while 2.5D/3D CT adoption grows to enhance layer separation and quantitative capability?especially for voiding distributions, crack morphology, foreign-material localization, and batch traceability?driving deeper integration with SPC and root-cause analytics. Off-line CT and failure analysis are moving earlier into NPI to accelerate yield ramp. Meanwhile, next-generation systems emphasize software capability and imaging-chain upgrades, signaling competition shifting from single-image clarity toward decision consistency, low false calls, traceability, and replicable deployment excellence.

Global key Electronics Industry X-ray Inspection Equipment players cover ViTrox, Viscom, Nordson, Omron, Unicomp Technology, NIKON, Waygate Technologies (Baker Hughes), Comet Yxlon, Test Research Inc. (TRI), Seamark ZM, Zhengye Technology, ZEISS, Saki Corporation, XAVIS Co., Ltd., SEC, Techvalley, Goepel Electronic, Scionscope, SXRAY, Creative Electron, etc. In terms of revenue, the global three largest companies occupies occupied for a share nearly 39% in 2025.

This report studies the global Electronics Industry X-ray Inspection Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Electronics Industry X-ray Inspection Equipment 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 Electronics Industry X-ray Inspection Equipment that contribute to its increasing demand across many markets.

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

Global Electronics Industry X-ray Inspection Equipment total production and demand, 2021-2032, (Units)

Global Electronics Industry X-ray Inspection Equipment total production value, 2021-2032, (USD Million)

Global Electronics Industry X-ray Inspection Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Electronics Industry X-ray Inspection Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Electronics Industry X-ray Inspection Equipment domestic production, consumption, key domestic manufacturers and share

Global Electronics Industry X-ray Inspection Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Electronics Industry X-ray Inspection Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Electronics Industry X-ray Inspection Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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

**Detailed Segmentation:**

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

Global Electronics Industry X-ray Inspection Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Electronics Industry X-ray Inspection Equipment Market, Segmentation by Type:

Inline X-ray Inspection Equipment

Offline X-ray Inspection Equipment

Global Electronics Industry X-ray Inspection Equipment Market, Segmentation by Technology Type:

2D X-ray Inspection Equipment

3D X-ray Inspection Equipment

Global Electronics Industry X-ray Inspection Equipment Market, Segmentation by Production Line Type:

Large-volume Production

Prototype and Small Quantities

Global Electronics Industry X-ray Inspection Equipment Market, Segmentation by Application:

PCB Industry

Integrated Circuits

Others

## Companies Profiled:

ViTrox

Viscom

Nordson

Omron

Unicomp Technology

NIKON

Waygate Technologies (Baker Hughes)

Comet Yxlon

Test Research Inc. (TRI)

Seamark ZM

Zhengye Technology

ZEISS

Saki Corporation

XAVIS Co., Ltd.

SEC

Techvalley

Goepel Electronic

Scienscope

SXRAY

## Creative Electron

### **Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Electronics Industry X-ray Inspection Equipment Introduction
- 1.2 World Electronics Industry X-ray Inspection Equipment Supply & Forecast
  - 1.2.1 World Electronics Industry X-ray Inspection Equipment Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Electronics Industry X-ray Inspection Equipment Production (2021-2032)
  - 1.2.3 World Electronics Industry X-ray Inspection Equipment Pricing Trends (2021-2032)
- 1.3 World Electronics Industry X-ray Inspection Equipment Production by Region (Based on Production Site)
  - 1.3.1 World Electronics Industry X-ray Inspection Equipment Production Value by Region (2021-2032)
  - 1.3.2 World Electronics Industry X-ray Inspection Equipment Production by Region (2021-2032)
  - 1.3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Region (2021-2032)
  - 1.3.4 North America Electronics Industry X-ray Inspection Equipment Production (2021-2032)
  - 1.3.5 Europe Electronics Industry X-ray Inspection Equipment Production (2021-2032)
  - 1.3.6 China Electronics Industry X-ray Inspection Equipment Production (2021-2032)
  - 1.3.7 Japan Electronics Industry X-ray Inspection Equipment Production (2021-2032)
  - 1.3.8 South Korea Electronics Industry X-ray Inspection Equipment Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Electronics Industry X-ray Inspection Equipment Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Electronics Industry X-ray Inspection Equipment Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Electronics Industry X-ray Inspection Equipment Demand (2021-2032)
- 2.2 World Electronics Industry X-ray Inspection Equipment Consumption by Region
  - 2.2.1 World Electronics Industry X-ray Inspection Equipment Consumption by Region (2021-2026)
  - 2.2.2 World Electronics Industry X-ray Inspection Equipment Consumption Forecast by Region (2027-2032)

2.3 United States Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.4 China Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.5 Europe Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.6 Japan Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.7 South Korea Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.8 ASEAN Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

2.9 India Electronics Industry X-ray Inspection Equipment Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Electronics Industry X-ray Inspection Equipment Production Value by Manufacturer (2021-2026)

3.2 World Electronics Industry X-ray Inspection Equipment Production by Manufacturer (2021-2026)

3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Manufacturer (2021-2026)

3.4 Electronics Industry X-ray Inspection Equipment Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Electronics Industry X-ray Inspection Equipment Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Electronics Industry X-ray Inspection Equipment in 2025

3.5.3 Global Concentration Ratios (CR8) for Electronics Industry X-ray Inspection Equipment in 2025

3.6 Electronics Industry X-ray Inspection Equipment Market: Overall Company Footprint Analysis

3.6.1 Electronics Industry X-ray Inspection Equipment Market: Region Footprint

3.6.2 Electronics Industry X-ray Inspection Equipment Market: Company Product Type Footprint

3.6.3 Electronics Industry X-ray Inspection Equipment 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: Electronics Industry X-ray Inspection Equipment Production Value Comparison

4.1.1 United States VS China: Electronics Industry X-ray Inspection Equipment Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Electronics Industry X-ray Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Electronics Industry X-ray Inspection Equipment Production Comparison

4.2.1 United States VS China: Electronics Industry X-ray Inspection Equipment Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Electronics Industry X-ray Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Electronics Industry X-ray Inspection Equipment Consumption Comparison

4.3.1 United States VS China: Electronics Industry X-ray Inspection Equipment Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Electronics Industry X-ray Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Electronics Industry X-ray Inspection Equipment Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value (2021-2026)

4.4.3 United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production (2021-2026)

4.5 China Based Electronics Industry X-ray Inspection Equipment Manufacturers and Market Share

4.5.1 China Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value (2021-2026)

4.5.3 China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production (2021-2026)

4.6 Rest of World Based Electronics Industry X-ray Inspection Equipment Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Electronics Industry X-ray Inspection Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Inline X-ray Inspection Equipment

5.2.2 Offline X-ray Inspection Equipment

5.3 Market Segment by Type

5.3.1 World Electronics Industry X-ray Inspection Equipment Production by Type (2021-2032)

5.3.2 World Electronics Industry X-ray Inspection Equipment Production Value by Type (2021-2032)

5.3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY TECHNOLOGY TYPE**

6.1 World Electronics Industry X-ray Inspection Equipment Market Size Overview by Technology Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Technology Type

6.2.1 2D X-ray Inspection Equipment

6.2.2 3D X-ray Inspection Equipment

6.3 Market Segment by Technology Type

6.3.1 World Electronics Industry X-ray Inspection Equipment Production by Technology Type (2021-2032)

6.3.2 World Electronics Industry X-ray Inspection Equipment Production Value by Technology Type (2021-2032)

6.3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Technology Type (2021-2032)

## **7 MARKET ANALYSIS BY PRODUCTION LINE TYPE**

7.1 World Electronics Industry X-ray Inspection Equipment Market Size Overview by Production Line Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Production Line Type

7.2.1 Large-volume Production

7.2.2 Prototype and Small Quantities

7.3 Market Segment by Production Line Type

7.3.1 World Electronics Industry X-ray Inspection Equipment Production by Production Line Type (2021-2032)

7.3.2 World Electronics Industry X-ray Inspection Equipment Production Value by Production Line Type (2021-2032)

7.3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Production Line Type (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Electronics Industry X-ray Inspection Equipment Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 PCB Industry

8.2.2 Integrated Circuits

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World Electronics Industry X-ray Inspection Equipment Production by Application (2021-2032)

8.3.2 World Electronics Industry X-ray Inspection Equipment Production Value by Application (2021-2032)

8.3.3 World Electronics Industry X-ray Inspection Equipment Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 ViTrox

9.1.1 ViTrox Details

9.1.2 ViTrox Major Business

9.1.3 ViTrox Electronics Industry X-ray Inspection Equipment Product and Services

9.1.4 ViTrox Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 ViTrox Recent Developments/Updates

9.1.6 ViTrox Competitive Strengths & Weaknesses

## 9.2 Viscom

### 9.2.1 Viscom Details

### 9.2.2 Viscom Major Business

### 9.2.3 Viscom Electronics Industry X-ray Inspection Equipment Product and Services

### 9.2.4 Viscom Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.2.5 Viscom Recent Developments/Updates

### 9.2.6 Viscom Competitive Strengths & Weaknesses

## 9.3 Nordson

### 9.3.1 Nordson Details

### 9.3.2 Nordson Major Business

### 9.3.3 Nordson Electronics Industry X-ray Inspection Equipment Product and Services

### 9.3.4 Nordson Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.3.5 Nordson Recent Developments/Updates

### 9.3.6 Nordson Competitive Strengths & Weaknesses

## 9.4 Omron

### 9.4.1 Omron Details

### 9.4.2 Omron Major Business

### 9.4.3 Omron Electronics Industry X-ray Inspection Equipment Product and Services

### 9.4.4 Omron Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.4.5 Omron Recent Developments/Updates

### 9.4.6 Omron Competitive Strengths & Weaknesses

## 9.5 Unicomp Technology

### 9.5.1 Unicomp Technology Details

### 9.5.2 Unicomp Technology Major Business

### 9.5.3 Unicomp Technology Electronics Industry X-ray Inspection Equipment Product and Services

### 9.5.4 Unicomp Technology Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.5.5 Unicomp Technology Recent Developments/Updates

### 9.5.6 Unicomp Technology Competitive Strengths & Weaknesses

## 9.6 NIKON

### 9.6.1 NIKON Details

### 9.6.2 NIKON Major Business

### 9.6.3 NIKON Electronics Industry X-ray Inspection Equipment Product and Services

### 9.6.4 NIKON Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.6.5 NIKON Recent Developments/Updates
- 9.6.6 NIKON Competitive Strengths & Weaknesses
- 9.7 Waygate Technologies (Baker Hughes)
  - 9.7.1 Waygate Technologies (Baker Hughes) Details
  - 9.7.2 Waygate Technologies (Baker Hughes) Major Business
  - 9.7.3 Waygate Technologies (Baker Hughes) Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.7.4 Waygate Technologies (Baker Hughes) Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Waygate Technologies (Baker Hughes) Recent Developments/Updates
  - 9.7.6 Waygate Technologies (Baker Hughes) Competitive Strengths & Weaknesses
- 9.8 Comet Yxlon
  - 9.8.1 Comet Yxlon Details
  - 9.8.2 Comet Yxlon Major Business
  - 9.8.3 Comet Yxlon Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.8.4 Comet Yxlon Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Comet Yxlon Recent Developments/Updates
  - 9.8.6 Comet Yxlon Competitive Strengths & Weaknesses
- 9.9 Test Research Inc. (TRI)
  - 9.9.1 Test Research Inc. (TRI) Details
  - 9.9.2 Test Research Inc. (TRI) Major Business
  - 9.9.3 Test Research Inc. (TRI) Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.9.4 Test Research Inc. (TRI) Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Test Research Inc. (TRI) Recent Developments/Updates
  - 9.9.6 Test Research Inc. (TRI) Competitive Strengths & Weaknesses
- 9.10 Seamark ZM
  - 9.10.1 Seamark ZM Details
  - 9.10.2 Seamark ZM Major Business
  - 9.10.3 Seamark ZM Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.10.4 Seamark ZM Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 Seamark ZM Recent Developments/Updates
  - 9.10.6 Seamark ZM Competitive Strengths & Weaknesses
- 9.11 Zhengye Technology

- 9.11.1 Zhengye Technology Details
- 9.11.2 Zhengye Technology Major Business
- 9.11.3 Zhengye Technology Electronics Industry X-ray Inspection Equipment Product and Services
- 9.11.4 Zhengye Technology Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Zhengye Technology Recent Developments/Updates
- 9.11.6 Zhengye Technology Competitive Strengths & Weaknesses
- 9.12 ZEISS
  - 9.12.1 ZEISS Details
  - 9.12.2 ZEISS Major Business
  - 9.12.3 ZEISS Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.12.4 ZEISS Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.12.5 ZEISS Recent Developments/Updates
  - 9.12.6 ZEISS Competitive Strengths & Weaknesses
- 9.13 Saki Corporation
  - 9.13.1 Saki Corporation Details
  - 9.13.2 Saki Corporation Major Business
  - 9.13.3 Saki Corporation Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.13.4 Saki Corporation Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.13.5 Saki Corporation Recent Developments/Updates
  - 9.13.6 Saki Corporation Competitive Strengths & Weaknesses
- 9.14 XAVIS Co., Ltd.
  - 9.14.1 XAVIS Co., Ltd. Details
  - 9.14.2 XAVIS Co., Ltd. Major Business
  - 9.14.3 XAVIS Co., Ltd. Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.14.4 XAVIS Co., Ltd. Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.14.5 XAVIS Co., Ltd. Recent Developments/Updates
  - 9.14.6 XAVIS Co., Ltd. Competitive Strengths & Weaknesses
- 9.15 SEC
  - 9.15.1 SEC Details
  - 9.15.2 SEC Major Business
  - 9.15.3 SEC Electronics Industry X-ray Inspection Equipment Product and Services
  - 9.15.4 SEC Electronics Industry X-ray Inspection Equipment Production, Price, Value,

## Gross Margin and Market Share (2021-2026)

9.15.5 SEC Recent Developments/Updates

9.15.6 SEC Competitive Strengths & Weaknesses

## 9.16 Techvalley

9.16.1 Techvalley Details

9.16.2 Techvalley Major Business

9.16.3 Techvalley Electronics Industry X-ray Inspection Equipment Product and Services

9.16.4 Techvalley Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Techvalley Recent Developments/Updates

9.16.6 Techvalley Competitive Strengths & Weaknesses

## 9.17 Goepel Electronic

9.17.1 Goepel Electronic Details

9.17.2 Goepel Electronic Major Business

9.17.3 Goepel Electronic Electronics Industry X-ray Inspection Equipment Product and Services

9.17.4 Goepel Electronic Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Goepel Electronic Recent Developments/Updates

9.17.6 Goepel Electronic Competitive Strengths & Weaknesses

## 9.18 Scienscope

9.18.1 Scienscope Details

9.18.2 Scienscope Major Business

9.18.3 Scienscope Electronics Industry X-ray Inspection Equipment Product and Services

9.18.4 Scienscope Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Scienscope Recent Developments/Updates

9.18.6 Scienscope Competitive Strengths & Weaknesses

## 9.19 SXRAY

9.19.1 SXRAY Details

9.19.2 SXRAY Major Business

9.19.3 SXRAY Electronics Industry X-ray Inspection Equipment Product and Services

9.19.4 SXRAY Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 SXRAY Recent Developments/Updates

9.19.6 SXRAY Competitive Strengths & Weaknesses

## 9.20 Creative Electron

- 9.20.1 Creative Electron Details
- 9.20.2 Creative Electron Major Business
- 9.20.3 Creative Electron Electronics Industry X-ray Inspection Equipment Product and Services
- 9.20.4 Creative Electron Electronics Industry X-ray Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.20.5 Creative Electron Recent Developments/Updates
- 9.20.6 Creative Electron Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Electronics Industry X-ray Inspection Equipment Industry Chain
- 10.2 Electronics Industry X-ray Inspection Equipment Upstream Analysis
  - 10.2.1 Electronics Industry X-ray Inspection Equipment Core Raw Materials
  - 10.2.2 Main Manufacturers of Electronics Industry X-ray Inspection Equipment Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Electronics Industry X-ray Inspection Equipment Production Mode
- 10.6 Electronics Industry X-ray Inspection Equipment Procurement Model
- 10.7 Electronics Industry X-ray Inspection Equipment Industry Sales Model and Sales Channels
  - 10.7.1 Electronics Industry X-ray Inspection Equipment Sales Model
  - 10.7.2 Electronics Industry X-ray Inspection Equipment Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Electronics Industry X-ray Inspection Equipment Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Electronics Industry X-ray Inspection Equipment Production Value by Region (2021-2026) & (USD Million)

Table 3. World Electronics Industry X-ray Inspection Equipment Production Value by Region (2027-2032) & (USD Million)

Table 4. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Region (2021-2026)

Table 5. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Region (2027-2032)

Table 6. World Electronics Industry X-ray Inspection Equipment Production by Region (2021-2026) & (Units)

Table 7. World Electronics Industry X-ray Inspection Equipment Production by Region (2027-2032) & (Units)

Table 8. World Electronics Industry X-ray Inspection Equipment Production Market Share by Region (2021-2026)

Table 9. World Electronics Industry X-ray Inspection Equipment Production Market Share by Region (2027-2032)

Table 10. World Electronics Industry X-ray Inspection Equipment Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Electronics Industry X-ray Inspection Equipment Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Electronics Industry X-ray Inspection Equipment Major Market Trends

Table 13. World Electronics Industry X-ray Inspection Equipment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Electronics Industry X-ray Inspection Equipment Consumption by Region (2021-2026) & (Units)

Table 15. World Electronics Industry X-ray Inspection Equipment Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Electronics Industry X-ray Inspection Equipment Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Electronics Industry X-ray Inspection Equipment Producers in 2025

Table 18. World Electronics Industry X-ray Inspection Equipment Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Electronics Industry X-ray Inspection Equipment Producers in 2025

Table 20. World Electronics Industry X-ray Inspection Equipment Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Electronics Industry X-ray Inspection Equipment Company Evaluation Quadrant

Table 22. World Electronics Industry X-ray Inspection Equipment Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Electronics Industry X-ray Inspection Equipment Production Site of Key Manufacturer

Table 24. Electronics Industry X-ray Inspection Equipment Market: Company Product Type Footprint

Table 25. Electronics Industry X-ray Inspection Equipment Market: Company Product Application Footprint

Table 26. Electronics Industry X-ray Inspection Equipment Competitive Factors

Table 27. Electronics Industry X-ray Inspection Equipment New Entrant and Capacity Expansion Plans

Table 28. Electronics Industry X-ray Inspection Equipment Mergers & Acquisitions Activity

Table 29. United States VS China Electronics Industry X-ray Inspection Equipment Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Electronics Industry X-ray Inspection Equipment Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Electronics Industry X-ray Inspection Equipment Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share (2021-2026)

Table 37. China Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share (2021-2026)

Table 42. Rest of World Based Electronics Industry X-ray Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share (2021-2026)

Table 47. World Electronics Industry X-ray Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Electronics Industry X-ray Inspection Equipment Production by Type (2021-2026) & (Units)

Table 49. World Electronics Industry X-ray Inspection Equipment Production by Type (2027-2032) & (Units)

Table 50. World Electronics Industry X-ray Inspection Equipment Production Value by Type (2021-2026) & (USD Million)

Table 51. World Electronics Industry X-ray Inspection Equipment Production Value by Type (2027-2032) & (USD Million)

Table 52. World Electronics Industry X-ray Inspection Equipment Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Electronics Industry X-ray Inspection Equipment Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Electronics Industry X-ray Inspection Equipment Production Value by Technology Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Electronics Industry X-ray Inspection Equipment Production by Technology Type (2021-2026) & (Units)

Table 56. World Electronics Industry X-ray Inspection Equipment Production by Technology Type (2027-2032) & (Units)

Table 57. World Electronics Industry X-ray Inspection Equipment Production Value by Technology Type (2021-2026) & (USD Million)

Table 58. World Electronics Industry X-ray Inspection Equipment Production Value by

Technology Type (2027-2032) & (USD Million)

Table 59. World Electronics Industry X-ray Inspection Equipment Average Price by Technology Type (2021-2026) & (K US\$/Unit)

Table 60. World Electronics Industry X-ray Inspection Equipment Average Price by Technology Type (2027-2032) & (K US\$/Unit)

Table 61. World Electronics Industry X-ray Inspection Equipment Production Value by Production Line Type, (USD Million), 2021 & 2025 & 2032

Table 62. World Electronics Industry X-ray Inspection Equipment Production by Production Line Type (2021-2026) & (Units)

Table 63. World Electronics Industry X-ray Inspection Equipment Production by Production Line Type (2027-2032) & (Units)

Table 64. World Electronics Industry X-ray Inspection Equipment Production Value by Production Line Type (2021-2026) & (USD Million)

Table 65. World Electronics Industry X-ray Inspection Equipment Production Value by Production Line Type (2027-2032) & (USD Million)

Table 66. World Electronics Industry X-ray Inspection Equipment Average Price by Production Line Type (2021-2026) & (K US\$/Unit)

Table 67. World Electronics Industry X-ray Inspection Equipment Average Price by Production Line Type (2027-2032) & (K US\$/Unit)

Table 68. World Electronics Industry X-ray Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Electronics Industry X-ray Inspection Equipment Production by Application (2021-2026) & (Units)

Table 70. World Electronics Industry X-ray Inspection Equipment Production by Application (2027-2032) & (Units)

Table 71. World Electronics Industry X-ray Inspection Equipment Production Value by Application (2021-2026) & (USD Million)

Table 72. World Electronics Industry X-ray Inspection Equipment Production Value by Application (2027-2032) & (USD Million)

Table 73. World Electronics Industry X-ray Inspection Equipment Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Electronics Industry X-ray Inspection Equipment Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. ViTrox Basic Information, Manufacturing Base and Competitors

Table 76. ViTrox Major Business

Table 77. ViTrox Electronics Industry X-ray Inspection Equipment Product and Services

Table 78. ViTrox Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. ViTrox Recent Developments/Updates

Table 80. ViTrox Competitive Strengths & Weaknesses

Table 81. Viscom Basic Information, Manufacturing Base and Competitors

Table 82. Viscom Major Business

Table 83. Viscom Electronics Industry X-ray Inspection Equipment Product and Services

Table 84. Viscom Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Viscom Recent Developments/Updates

Table 86. Viscom Competitive Strengths & Weaknesses

Table 87. Nordson Basic Information, Manufacturing Base and Competitors

Table 88. Nordson Major Business

Table 89. Nordson Electronics Industry X-ray Inspection Equipment Product and Services

Table 90. Nordson Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Nordson Recent Developments/Updates

Table 92. Nordson Competitive Strengths & Weaknesses

Table 93. Omron Basic Information, Manufacturing Base and Competitors

Table 94. Omron Major Business

Table 95. Omron Electronics Industry X-ray Inspection Equipment Product and Services

Table 96. Omron Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Omron Recent Developments/Updates

Table 98. Omron Competitive Strengths & Weaknesses

Table 99. Unicomp Technology Basic Information, Manufacturing Base and Competitors

Table 100. Unicomp Technology Major Business

Table 101. Unicomp Technology Electronics Industry X-ray Inspection Equipment Product and Services

Table 102. Unicomp Technology Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Unicomp Technology Recent Developments/Updates

Table 104. Unicomp Technology Competitive Strengths & Weaknesses

Table 105. NIKON Basic Information, Manufacturing Base and Competitors

Table 106. NIKON Major Business

Table 107. NIKON Electronics Industry X-ray Inspection Equipment Product and Services

Table 108. NIKON Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. NIKON Recent Developments/Updates

Table 110. NIKON Competitive Strengths & Weaknesses

Table 111. Waygate Technologies (Baker Hughes) Basic Information, Manufacturing Base and Competitors

Table 112. Waygate Technologies (Baker Hughes) Major Business

Table 113. Waygate Technologies (Baker Hughes) Electronics Industry X-ray Inspection Equipment Product and Services

Table 114. Waygate Technologies (Baker Hughes) Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Waygate Technologies (Baker Hughes) Recent Developments/Updates

Table 116. Waygate Technologies (Baker Hughes) Competitive Strengths & Weaknesses

Table 117. Comet Yxlon Basic Information, Manufacturing Base and Competitors

Table 118. Comet Yxlon Major Business

Table 119. Comet Yxlon Electronics Industry X-ray Inspection Equipment Product and Services

Table 120. Comet Yxlon Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Comet Yxlon Recent Developments/Updates

Table 122. Comet Yxlon Competitive Strengths & Weaknesses

Table 123. Test Research Inc. (TRI) Basic Information, Manufacturing Base and Competitors

Table 124. Test Research Inc. (TRI) Major Business

Table 125. Test Research Inc. (TRI) Electronics Industry X-ray Inspection Equipment Product and Services

Table 126. Test Research Inc. (TRI) Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Test Research Inc. (TRI) Recent Developments/Updates

Table 128. Test Research Inc. (TRI) Competitive Strengths & Weaknesses

Table 129. Seamark ZM Basic Information, Manufacturing Base and Competitors

Table 130. Seamark ZM Major Business

Table 131. Seamark ZM Electronics Industry X-ray Inspection Equipment Product and Services

Table 132. Seamark ZM Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Seamark ZM Recent Developments/Updates

Table 134. Seamark ZM Competitive Strengths & Weaknesses

Table 135. Zhengye Technology Basic Information, Manufacturing Base and Competitors

Table 136. Zhengye Technology Major Business

Table 137. Zhengye Technology Electronics Industry X-ray Inspection Equipment Product and Services

Table 138. Zhengye Technology Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Zhengye Technology Recent Developments/Updates

Table 140. Zhengye Technology Competitive Strengths & Weaknesses

Table 141. ZEISS Basic Information, Manufacturing Base and Competitors

Table 142. ZEISS Major Business

Table 143. ZEISS Electronics Industry X-ray Inspection Equipment Product and Services

Table 144. ZEISS Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. ZEISS Recent Developments/Updates

Table 146. ZEISS Competitive Strengths & Weaknesses

Table 147. Saki Corporation Basic Information, Manufacturing Base and Competitors

Table 148. Saki Corporation Major Business

Table 149. Saki Corporation Electronics Industry X-ray Inspection Equipment Product and Services

Table 150. Saki Corporation Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Saki Corporation Recent Developments/Updates

Table 152. Saki Corporation Competitive Strengths & Weaknesses

Table 153. XAVIS Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. XAVIS Co., Ltd. Major Business

Table 155. XAVIS Co., Ltd. Electronics Industry X-ray Inspection Equipment Product and Services

Table 156. XAVIS Co., Ltd. Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. XAVIS Co., Ltd. Recent Developments/Updates

Table 158. XAVIS Co., Ltd. Competitive Strengths & Weaknesses

Table 159. SEC Basic Information, Manufacturing Base and Competitors

Table 160. SEC Major Business

Table 161. SEC Electronics Industry X-ray Inspection Equipment Product and Services

Table 162. SEC Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. SEC Recent Developments/Updates

Table 164. SEC Competitive Strengths & Weaknesses

Table 165. Techvalley Basic Information, Manufacturing Base and Competitors

Table 166. Techvalley Major Business

Table 167. Techvalley Electronics Industry X-ray Inspection Equipment Product and Services

Table 168. Techvalley Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Techvalley Recent Developments/Updates

Table 170. Techvalley Competitive Strengths & Weaknesses

Table 171. Goepel Electronic Basic Information, Manufacturing Base and Competitors

Table 172. Goepel Electronic Major Business

Table 173. Goepel Electronic Electronics Industry X-ray Inspection Equipment Product and Services

Table 174. Goepel Electronic Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Goepel Electronic Recent Developments/Updates

Table 176. Goepel Electronic Competitive Strengths & Weaknesses

Table 177. Scienscope Basic Information, Manufacturing Base and Competitors

Table 178. Scienscope Major Business

Table 179. Scienscope Electronics Industry X-ray Inspection Equipment Product and Services

Table 180. Scienscope Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Scienscope Recent Developments/Updates

Table 182. Scienscope Competitive Strengths & Weaknesses

Table 183. SXRAY Basic Information, Manufacturing Base and Competitors

Table 184. SXRAY Major Business

Table 185. SXRAY Electronics Industry X-ray Inspection Equipment Product and Services

Table 186. SXRAY Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. SXRAY Recent Developments/Updates

Table 188. SXRAY Competitive Strengths & Weaknesses

Table 189. Creative Electron Basic Information, Manufacturing Base and Competitors

Table 190. Creative Electron Major Business

Table 191. Creative Electron Electronics Industry X-ray Inspection Equipment Product and Services

Table 192. Creative Electron Electronics Industry X-ray Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Creative Electron Recent Developments/Updates

Table 194. Creative Electron Competitive Strengths & Weaknesses

Table 195. Global Key Players of Electronics Industry X-ray Inspection Equipment Upstream (Raw Materials)

Table 196. Global Electronics Industry X-ray Inspection Equipment Typical Customers

Table 197. Electronics Industry X-ray Inspection Equipment Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Electronics Industry X-ray Inspection Equipment Picture

Figure 2. World Electronics Industry X-ray Inspection Equipment Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Electronics Industry X-ray Inspection Equipment Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 5. World Electronics Industry X-ray Inspection Equipment Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Region (2021-2032)

Figure 7. World Electronics Industry X-ray Inspection Equipment Production Market Share by Region (2021-2032)

Figure 8. North America Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 9. Europe Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 10. China Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 11. Japan Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 12. South Korea Electronics Industry X-ray Inspection Equipment Production (2021-2032) & (Units)

Figure 13. Electronics Industry X-ray Inspection Equipment Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 16. World Electronics Industry X-ray Inspection Equipment Consumption Market Share by Region (2021-2032)

Figure 17. United States Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 18. China Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 19. Europe Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 20. Japan Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 21. South Korea Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 22. ASEAN Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 23. India Electronics Industry X-ray Inspection Equipment Consumption (2021-2032) & (Units)

Figure 24. Producer Shipments of Electronics Industry X-ray Inspection Equipment by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Electronics Industry X-ray Inspection Equipment Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Electronics Industry X-ray Inspection Equipment Markets in 2025

Figure 27. United States VS China: Electronics Industry X-ray Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Electronics Industry X-ray Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Electronics Industry X-ray Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share 2025

Figure 31. China Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Electronics Industry X-ray Inspection Equipment Production Market Share 2025

Figure 33. World Electronics Industry X-ray Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Type in 2025

Figure 35. Inline X-ray Inspection Equipment

Figure 36. Offline X-ray Inspection Equipment

Figure 37. World Electronics Industry X-ray Inspection Equipment Production Market Share by Type (2021-2032)

Figure 38. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Type (2021-2032)

Figure 39. World Electronics Industry X-ray Inspection Equipment Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Electronics Industry X-ray Inspection Equipment Production Value by

Technology Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Technology Type in 2025

Figure 42. 2D X-ray Inspection Equipment

Figure 43. 3D X-ray Inspection Equipment

Figure 44. World Electronics Industry X-ray Inspection Equipment Production Market Share by Technology Type (2021-2032)

Figure 45. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Technology Type (2021-2032)

Figure 46. World Electronics Industry X-ray Inspection Equipment Average Price by Technology Type (2021-2032) & (K US\$/Unit)

Figure 47. World Electronics Industry X-ray Inspection Equipment Production Value by Production Line Type, (USD Million), 2021 & 2025 & 2032

Figure 48. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Production Line Type in 2025

Figure 49. Large-volume Production

Figure 50. Prototype and Small Quantities

Figure 51. World Electronics Industry X-ray Inspection Equipment Production Market Share by Production Line Type (2021-2032)

Figure 52. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Production Line Type (2021-2032)

Figure 53. World Electronics Industry X-ray Inspection Equipment Average Price by Production Line Type (2021-2032) & (K US\$/Unit)

Figure 54. World Electronics Industry X-ray Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Application in 2025

Figure 56. PCB Industry

Figure 57. Integrated Circuits

Figure 58. Others

Figure 59. World Electronics Industry X-ray Inspection Equipment Production Market Share by Application (2021-2032)

Figure 60. World Electronics Industry X-ray Inspection Equipment Production Value Market Share by Application (2021-2032)

Figure 61. World Electronics Industry X-ray Inspection Equipment Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 62. Electronics Industry X-ray Inspection Equipment Industry Chain

Figure 63. Electronics Industry X-ray Inspection Equipment Procurement Model

Figure 64. Electronics Industry X-ray Inspection Equipment Sales Model

Figure 65. Electronics Industry X-ray Inspection Equipment Sales Channels, Direct Sales, and Distribution

Figure 66. Methodology

Figure 67. Research Process and Data Source

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