

Global PCB Industry X-ray Inspection Equipment 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 PCB Industry X-ray Inspection Equipment market size was valued at US\$ 351 million in 2025 and is forecast to a readjusted size of US\$ 618 million by 2032 with a CAGR of 7.4% during review period.

In 2025, global PCB Industry X-ray Inspection Equipment production reached approximately 2,305 units, with an average global market price of around K US\$ 147.81 per unit.

X-ray inspection equipment can perform comprehensive inspection of PCBs, detecting defects not only on the PCB surface but also within the PCBA itself. 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.

In this report, PCB Industry X-ray Inspection Equipment primarily refers to X-ray inspection equipment used in PCB electronic manufacturing.

PCB Industry X-ray Inspection Equipment refers to non-destructive inspection systems

used for printed circuit boards (PCB) and assembled boards (PCBA/SMT). A typical system integrates a microfocus/high-power X-ray source, high-resolution detectors, precision motion and radiation shielding, plus reconstruction and automated defect-recognition software to deliver volumetric 'inside-the-product' evidence without damaging the sample. On the PCB fabrication side, it supports internal layer verification, registration shift analysis, and blind/buried microvia formation and fill quality checks for multilayer, HDI and substrate boards. On the assembly side, it focuses on hidden solder-joint integrity for BGA/QFN and similar packages, voiding, insufficient solder, bridging, foreign materials and cracks. Compared with AOI (surface-oriented), X-ray inspection expands quality control to internal failure mechanisms that drive field returns in high-reliability applications such as AI servers, high-speed networking and automotive electronics, making it a foundational tool for process release, failure analysis and yield closed-loop improvement.

Production model: dominated by a 'platformized modules + application-engineering delivery' model. OEMs standardize the tube/detector/motion/shielding and industrial control architecture, then configure board size, takt time, resolution, defect libraries and traceability interfaces per customer; delivery is gated by metrology calibration, radiation safety compliance, process validation and MES/QMS connectivity. Market leaders differentiate through platform upgrades for larger boards and more complex structures, and through algorithm evolution that reduces false calls under scattering/artefacts.

Gross margin: typically ~35%-55% as a blended mix of hardware platform, software/AI licensing and recurring service/spares; margins trend higher with stronger 3D/tomosynthesis capability, richer software value and high-throughput large-format platforms (industry-tracking estimate).

Value chain: upstream (X-ray tubes & HV, flat-panel detectors, motion & shielding materials, industrial computing and AI/reconstruction); midstream (system integration, reconstruction/defect analytics software, applications engineering and service); downstream (PCB fabrication-multilayer/HDI/substrates, EMS/SMT lines, data-center and automotive electronics manufacturing, and FA/3rd-party labs).

Market Development Opportunities & Main Driving Factors

AI infrastructure is pushing PCB toward higher layer counts, denser interconnect, lower loss materials and stricter reliability. Brokerage research highlights high-end PCB (high-layer, HDI and substrates) as a structural growth engine, with application-driven requirements moving materially upward. As complexity rises and hidden defects

become more costly, X-ray inspection shifts from a sampling tool to a yield-and-reputation moat?quantifying solder integrity in PCBA while providing earlier process evidence for internal structures and registration in PCB fabrication, effectively moving quality risk detection upstream.

Market Challenges, Risks, & Restraints

Competition is a systems game: imaging physics, mechanical precision, algorithm industrialization and compliant delivery. Stable tubes/detectors and precision motion demand supply-chain consistency; automated judgement and 3D reconstruction require high-quality labeled data, process priors and sustained application engineering, creating ?cold start? and misclassification risks when scaling across customers. Annual-report disclosures also indicate ongoing upgrades for larger-format inspection, tomographic angles and reconstruction techniques, reflecting the real-world difficulty of artefacts and shading in dense assemblies. Meanwhile, tighter radiation safety, metrology and quality documentation requirements?along with government mechanisms promoting PCB industry standardization and upgrading?raise the bar for compliance and end-to-end quality evidence.

Downstream Demand Trends

Demand is moving from ?seeing defects? to ?quantifying defects and closing the loop.? For AI-server and high-speed networking boards, customers increasingly care about statistical distributions (e.g., voiding profiles), anomaly patterns and batch traceability, accelerating deeper integration between AXI and MES/quality data platforms and pushing AI inspection from assisted review toward automated disposition and root-cause feedback. In parallel, larger boards and denser packaging drive requirements for wider field-of-view, higher throughput, and stronger tomographic/3D capability. Annual-report R&D directions?large-format adaptation, tomographic reconstruction and low-dose imaging?signal the industry?s path toward higher reliability and stronger engineering deployment.

Global key PCB 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 is a detailed and comprehensive analysis for global PCB Industry X-ray Inspection Equipment 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 PCB Industry X-ray Inspection Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global PCB Industry X-ray Inspection Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global PCB Industry X-ray Inspection Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global PCB Industry X-ray Inspection Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for PCB Industry X-ray Inspection Equipment

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 PCB Industry X-ray Inspection Equipment

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 ViTrox, Viscom, Nordson, Omron, Unicom 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.

Market Segmentation

PCB Industry X-ray Inspection Equipment 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 segment by Type

- Inline X-ray Inspection Equipment

- Offline X-ray Inspection Equipment

Market segment by Technology Type

- 2D X-ray Inspection Equipment

- 3D X-ray Inspection Equipment

Market segment by Production Line Type

- Large-volume Production

- Prototype and Small Quantities

Market segment by Application

Automotive Electronics

Consumer Electronics

Industrial Electronics

Telecommunications

Aerospace and Military

Others

Major players covered

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

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PCB Industry X-ray Inspection Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PCB Industry X-ray Inspection Equipment, with price, sales quantity, revenue, and global market share of PCB Industry X-ray Inspection Equipment from 2021 to 2026.

Chapter 3, the PCB Industry X-ray Inspection Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PCB Industry X-ray Inspection Equipment 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 PCB Industry X-ray Inspection Equipment 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 PCB Industry X-ray Inspection Equipment.

Chapter 14 and 15, to describe PCB Industry X-ray Inspection Equipment sales channel, distributors, customers, research findings and conclusion.

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