

# Global PCB Reflow Soldering System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global PCB Reflow Soldering System market size was valued at US\$ 375 million in 2025 and is forecast to a readjusted size of US\$ 545 million by 2032 with a CAGR of 5.4% during review period.

PCB Reflow Soldering System refers to core electronic assembly equipment used in the surface mount technology process for printed circuit boards, in which a controlled temperature profile melts solder paste, promotes wetting, and forms reliable solder joints. The product scope mainly includes hot air reflow soldering systems, nitrogen reflow soldering systems, vacuum reflow soldering systems, and vapor phase reflow soldering systems. Common configurations include 8-zone, 10-zone, 12-zone and above heating structures, multi-rail conveying, nitrogen protection, low-oxygen control, flux recovery, vacuum low-void soldering, cooling control, and intelligent temperature control systems. Upstream materials and key components mainly include stainless steel frames, insulation materials, heating modules, fans and convection systems, temperature sensors, PLC and motion control systems, conveyor chains or mesh belts, nitrogen control systems, vacuum pumps, cooling modules, flux filtration and recovery units, electrical components, and industrial software. Major downstream customers include EMS providers, consumer electronics manufacturers, automotive electronics companies, communications and server equipment manufacturers, industrial control and power electronics companies, medical electronics manufacturers, and aerospace electronics suppliers. On an ex-factory price basis, global PCB Reflow Soldering System capacity in 2025 is estimated at about 6,200 units, while global sales volume is estimated at about 4,638 units, with an average ex-factory price of about USD 78,600 per unit. Standard hot air reflow and nitrogen reflow systems account for the majority of shipment volume, while vacuum reflow, vapor phase reflow, dual-rail high-throughput

systems, and high-end systems with 12 or more heating zones have higher penetration in automotive electronics, power modules, server motherboards, and high-reliability PCB assembly, contributing a larger share of revenue. The average industry gross margin is estimated at about 22%–36% in 2025, with relatively higher margins in high-end vacuum reflow, nitrogen reflow, vapor phase reflow, and customized high-reliability systems, and relatively lower margins in standard hot air reflow systems and mid-range Chinese equipment due to price competition, configuration differences, and capacity utilization pressure.

The global PCB Reflow Soldering System market is a core segment of SMT electronic assembly equipment, with demand mainly coming from consumer electronics, automotive electronics, communications equipment, servers and computing hardware, industrial control, power electronics, medical electronics, and aerospace electronics. The current market is characterized by competition between high-end European, U.S. and Japanese equipment suppliers and Chinese suppliers offering mid-range and cost-effective systems. High-end products focus on temperature uniformity, low-oxygen control, nitrogen protection, low-void soldering, flux recovery, energy efficiency, and long-term stability, while mid-range products mainly serve standard SMT lines, consumer electronics, and general industrial electronics manufacturing. Since reflow soldering equipment directly affects solder joint quality, production throughput, and process yield, customers usually place strong emphasis on equipment stability, temperature control accuracy, line compatibility, after-sales service, and total cost of ownership.

Future market growth will mainly benefit from rising demand in automotive electronics, AI servers, communications equipment, power electronics, and high-reliability PCB assembly. New energy vehicles, intelligent driving systems, domain controllers, automotive sensors, power modules, and battery management systems require higher solder joint reliability, which will support demand for nitrogen reflow, vacuum reflow, and low-void soldering systems. AI servers, data center hardware, high-speed communications equipment, and high-density PCB assembly also require better temperature profile control, thermal capacity matching, board warpage control, and process stability. As electronics continue to move toward miniaturization, higher density, higher power, and higher reliability, reflow soldering systems will continue to upgrade toward multi-zone heating, lower energy consumption, intelligent control, dual-rail high-speed production, and traceable process data.

Key market drivers include automation upgrades in electronics manufacturing, renewal of SMT production lines, rising penetration of automotive-grade and high-reliability

electronic products, and manufacturers' increasing focus on yield, energy consumption, and process consistency. For EMS providers and electronics OEMs, advanced reflow soldering systems help control soldering defects, reduce voiding, improve line stability, and meet stricter quality certification requirements. For equipment manufacturers, competition will gradually shift from hardware configuration alone toward thermal management design, process databases, intelligent monitoring, energy optimization, flux management, and full-line integration capability. Companies with capabilities in vacuum reflow, nitrogen control, dual-rail conveying, and high-end customer validation are expected to obtain higher-value orders in automotive electronics, server motherboards, power devices, and high-reliability manufacturing.

The main market barriers include long equipment replacement cycles, periodic overcapacity in standard SMT production, fluctuations in downstream capital expenditure, and strong price competition in mid- and low-end equipment. Reflow soldering systems are durable capital equipment, and customers typically do not replace them frequently. Incremental demand mainly comes from line expansion, process upgrades, and the adoption of high-end applications. If end-market demand in consumer electronics slows, procurement of standard hot air reflow systems may also weaken. At the same time, the large number of mid-range Chinese suppliers has intensified price competition in standard equipment, putting pressure on average industry margins. Overall, the PCB Reflow Soldering System market is expected to maintain steady growth, with high-end upgrading, energy efficiency, intelligent control, and high-reliability applications becoming the main development directions, while growth potential for standard entry-level systems remains relatively limited.

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

#### Key Features:

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

Global PCB Reflow Soldering System market size and forecasts by region and country,

in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

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

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

The Primary Objectives in This Report Are:

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

To assess the growth potential for PCB Reflow Soldering System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global PCB Reflow Soldering System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Rehm Thermal Systems, Kurtz Ersä, Amtech Systems, Heller Industries, Illinois Tool Works, SMT Wertheim, SEHO Systems, TAMURA Corporation, Senju Metal Industry, JUKI Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

## Market Segmentation

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

## Market segment by Type

Hot Air Reflow Soldering Systems

Nitrogen Reflow Soldering Systems

Vacuum Reflow Soldering Systems

Vapor Phase Reflow Soldering Systems

Others

#### Market segment by Heating Zone

6-Zone and Below Reflow Systems

8-Zone Reflow Systems

10-Zone Reflow Systems

12-Zone and Above Reflow Systems

#### Market segment by Rail Configuration

Single-Rail Reflow Soldering Systems

Dual-Rail Reflow Soldering Systems

Multi-Rail Reflow Soldering Systems

#### Market segment by Application

Consumer Electronics

Automotive Electronics

Communications and Computing Equipment

Industrial Control and Power Electronics

Medical and Aerospace Electronics

Major players covered

Rehm Thermal Systems

Kurtz Ersä

Amtech Systems

Heller Industries

Illinois Tool Works

SMT Wertheim

SEHO Systems

TAMURA Corporation

Senju Metal Industry

JUKI Corporation

Eightech Tectron

Shenzhen JT Automation Equipment

Suneast Technology

Guangdong Folungwin Intelligent Equipment

Shenzhen ETA Electronic Equipment

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 Reflow Soldering System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PCB Reflow Soldering System, with price, sales quantity, revenue, and global market share of PCB Reflow Soldering System from 2021 to 2026.

Chapter 3, the PCB Reflow Soldering System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PCB Reflow Soldering System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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

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

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

Chapter 13, the key raw materials and key suppliers, and industry chain of PCB Reflow Soldering System.

Chapter 14 and 15, to describe PCB Reflow Soldering System sales channel, distributors, customers, research findings and conclusion.

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