

Global PCB Welding 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 Welding System market size was valued at US\$ 1580 million in 2025 and is forecast to a readjusted size of US\$ 2338 million by 2032 with a CAGR of 5.7% during review period.

PCB welding systems refer to system-level equipment used to form reliable solder joints in PCB and PCBA manufacturing, covering electronic components, through-hole parts, flexible circuits, connectors, and board-level interconnects. The category mainly includes reflow soldering systems, wave soldering systems, selective soldering systems, as well as precision localized soldering equipment such as robotic soldering, laser soldering, and hot bar reflow systems. Key upstream materials and components include steel and aluminum frames, furnace sheet-metal structures, heaters, hot-air circulation units, solder pots, soldering nozzles, fluxing modules, conveyor rails, servo motors, PLCs, industrial controllers, temperature sensors, vision positioning modules, lasers, solder wire feeding mechanisms, thermodes, and process control software. Major downstream customers include EMS providers, consumer electronics manufacturers, automotive electronics companies, communication equipment makers, industrial control equipment producers, power electronics suppliers, medical electronics manufacturers, and other high-reliability electronics assembly users. The global nominal production capacity of PCB soldering systems was estimated at approximately 38,460 units in 2025, with actual sales volume of about 29,563 units, an average selling price of around USD 51,960 per unit, and an industry gross margin generally ranging from 28% to 36%.

The global PCB welding system market is undergoing structural upgrading on top of a mature installed base. Conventional reflow and wave soldering systems remain core

equipment in electronics assembly lines, with demand driven by consumer electronics, communication equipment, automotive electronics, industrial control, and power electronics manufacturing. As board density increases, components become smaller, and mixed-technology designs become more common, customers are placing higher requirements on thermal uniformity, solder joint consistency, void control, and process stability. Equipment purchasing is therefore shifting from a simple focus on throughput toward yield improvement, energy efficiency, process control, and traceability. European, American, and Japanese suppliers still have strong advantages in high-end thermal control and precision localized soldering, while Chinese suppliers continue to gain share in mid-range systems, fast-response service, and domestic substitution.

From a competitive perspective, the industry is characterized by the coexistence of multiple process routes. Reflow soldering remains the mainstream process for surface-mount assembly, wave soldering continues to serve through-hole and selected mixed-board applications, selective soldering is better suited to complex boards and high-reliability localized joints, while robotic soldering, laser soldering, and hot bar reflow are mainly used for precision interconnects, flexible circuits, connectors, and high-mix low-volume applications. Because these equipment categories differ significantly in customer base, technical barrier, and price range, competition is not simply a matter of one machine type replacing another. It is increasingly centered on full process capability, application experience, and long-term service support. Suppliers with broad equipment portfolios and strong process validation capabilities are more likely to build durable relationships with major electronics manufacturers.

Looking ahead, market development will be shaped by higher reliability, smarter control, better energy efficiency, and greater manufacturing flexibility. Automotive electronics, servers, energy storage, power modules, and medical electronics require stronger solder joint reliability, which will support demand for higher-value equipment such as vacuum reflow systems, selective soldering systems, laser soldering systems, and hot bar bonding systems. At the same time, manufacturers are paying more attention to production data loops, making process parameter management, temperature profile tracking, vision positioning, quality data collection, and factory system connectivity increasingly important. For high-mix low-volume customers, quick changeover, recipe reuse, modular configuration, and reduced dependence on manual tuning will also become key considerations in equipment selection.

However, the industry still faces several constraints. Electronics manufacturing capital expenditure is cyclical, and investment fluctuations in consumer electronics and

communication equipment can affect equipment purchasing schedules. Low-end reflow and wave soldering markets are highly commoditized, exposing some suppliers to price competition and margin pressure. In addition, high-end soldering systems depend not only on hardware performance, but also on process databases, application engineering, and after-sales service. New entrants may have manufacturing capability, but still need time to complete customer validation. In the long run, the most competitive suppliers will be those capable of combining reliable equipment, process support, software capability, and global service networks.

This report is a detailed and comprehensive analysis for global PCB Welding 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 Welding System market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

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

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

Global PCB Welding System market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 PCB Welding 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 Welding 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 Kurtz Erska, Rehm Thermal Systems, SEHO Systems, INERTEC L?ttechnik, Pillarhouse International, Heller Industries, BTU International, ITW EAE, Nordson, DDM Novastar, etc.

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

Market Segmentation

PCB Welding 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

Reflow Soldering Systems

Wave Soldering Systems

Selective Soldering Systems

Other

Market segment by Production Deployment

Inline Systems

Stand-alone Systems

Other

Market segment by Product Value Tier

Entry-level Systems

Mid-range Production Systems

Premium High-reliability Systems

Market segment by Application

Consumer Electronics

Automotive Electronics

Communication and Data Equipment

Other

Major players covered

Kurtz Ersä

Rehm Thermal Systems

SEHO Systems

INERTEC L?technik

Pillarhouse International

Heller Industries

BTU International

ITW EAE

Nordson

DDM Novastar

Advanced Integrated Technologies

Tamura

KOKI TEC

Senju Metal Industry

Japan Unix

Apollo Seiko

Hakko

AMADA WELD TECH

Tsutsumi Electric

JT Automation

Nitto Intelligent Equipment Technology

Sasinno

Quick Intelligent Equipment

Shenzhen Melway Robot

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

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

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

Chapter 4, the PCB Welding 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 Welding 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

Welding System.

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

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