

# Global SPI Equipment for Electronics Manufacturing Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global SPI Equipment for Electronics Manufacturing market size is expected to reach \$ 489 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

SPI Equipment for Electronics Manufacturing refers to dedicated automated inspection and metrology systems installed after solder paste printing and before component placement in SMT production lines, primarily used to evaluate solder paste volume, height, area, positional offset, insufficient paste, excessive paste, bridging, edge collapse, peaking, and other printing abnormalities on PCB surfaces. The market is currently dominated by inline 3D SPI systems, while product development continues to move toward higher resolution, faster dual-lane throughput, closed-loop process control, and smart factory connectivity. Key upstream inputs include industrial cameras, image sensors, telecentric lenses, structured-light projection modules, laser measurement units, precision motion-control platforms, linear motors, guide rails and ball screws, industrial computers, control boards, machine frames, and inspection algorithm software. Major downstream customers include EMS providers, PCB assembly manufacturers, consumer electronics producers, automotive electronics companies, communication equipment makers, industrial and medical electronics manufacturers, as well as Mini-LED and other high-density electronics assembly firms. On an ex-factory basis, global effective production capacity in 2025 is estimated at approximately 8,240 units, with actual shipments of about 6,924 units and an average ex-factory selling price of around USD 46,000 per unit. The industry gross margin is generally assessed at 45%–58%, with standard inline SPI systems positioned in the middle of the range, while high-resolution, high-speed dual-lane, and customized systems for high-reliability electronics manufacturing typically achieve higher margins.

The market for SPI Equipment for Electronics Manufacturing has entered a sustained upgrade phase dominated by three-dimensional inspection, with demand increasingly shifting from basic defect screening toward process control and yield improvement. As electronic products continue to move toward miniaturization, higher density, and greater functional integration, solder paste printing quality has become more influential in downstream placement, reflow soldering, and final product reliability. Manufacturers are paying closer attention to the stable control of solder paste volume, height, area, and positional offset. In medium- and high-end production lines, SPI has become an increasingly important process checkpoint, and competition is moving beyond the ability to identify insufficient paste, excessive paste, and bridging toward inspection accuracy, false-call suppression, adaptability to complex boards, and long-term operating stability.

From the demand side, consumer electronics remains an important base market, while automotive electronics, servers and high-performance computing hardware, communication equipment, industrial control systems, and high-reliability electronics are becoming the main drivers of higher-end demand. Automotive electronics and power-control modules require stronger soldering reliability, process consistency, and quality traceability, encouraging the adoption of systems with high repeatability, warpage compensation, and stable analytical performance. High-density PCBs, miniature solder paste deposits, and more complex packaging structures are also raising the need for higher resolution and finer measurement capability. At the same time, electronics manufacturers are placing greater emphasis on line efficiency and data coordination, gradually transforming SPI from a standalone inspection unit into a key data node within SMT production lines.

Looking ahead, SPI equipment will continue to evolve toward higher precision, faster throughput, intelligent analysis, and closed-loop process control. Three-dimensional inspection has already become the mainstream direction, while hybrid 2D and 3D measurement, dynamic image-resolution switching, adaptability to complex surfaces, automated programming, and intelligent defect classification will remain important areas of product iteration. More importantly, SPI systems are becoming more closely connected with solder paste printers, placement machines, MES, and SPC platforms. Through machine-to-machine communication, process trend analysis, and parameter feedback, electronics manufacturing is gradually shifting from post-process judgment toward early warning and process optimization. Vendors with stronger AI-assisted analysis, intelligent review, and closed-loop control capabilities are likely to gain greater advantages in premium EMS, automotive electronics, and high-reliability manufacturing.

The industry still faces several constraints. SPI equipment requires deep integration of optical imaging, three-dimensional reconstruction, motion control, software algorithms, and process databases, creating relatively high development barriers and making it difficult for smaller vendors to enter premium segments. In addition, customer requirements vary significantly in PCB structures, solder paste characteristics, production takt time, and acceptance criteria, making equipment deployment, parameter tuning, and field engineering support important factors in purchase decisions. The electronics manufacturing industry also follows visible capital-expenditure cycles, and when end-market demand weakens, expansion slows, or replacement plans are postponed, SPI equipment purchases may also be delayed. Overall, the market retains solid medium- to long-term growth potential, but market share is likely to become more concentrated among suppliers with more complete technology platforms, stronger software capabilities, and more mature service systems.

This report studies the global SPI Equipment for Electronics Manufacturing production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for SPI Equipment for Electronics Manufacturing 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 SPI Equipment for Electronics Manufacturing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global SPI Equipment for Electronics Manufacturing total production and demand, 2021-2032, (Units)

Global SPI Equipment for Electronics Manufacturing total production value, 2021-2032, (USD Million)

Global SPI Equipment for Electronics Manufacturing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global SPI Equipment for Electronics Manufacturing consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: SPI Equipment for Electronics Manufacturing domestic production, consumption, key domestic manufacturers and share

Global SPI Equipment for Electronics Manufacturing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global SPI Equipment for Electronics Manufacturing production by Type, production,

value, CAGR, 2021-2032, (USD Million) & (Units)

Global SPI Equipment for Electronics Manufacturing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global SPI Equipment for Electronics Manufacturing 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 Koh Young Technology, Nordson, Test Research, ViTrox, MIRTEC, PARMi, PEMTRON, SAKI Corporation, Yamaha Motor, OMRON, 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 SPI Equipment for Electronics Manufacturing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 SPI Equipment for Electronics Manufacturing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global SPI Equipment for Electronics Manufacturing Market, Segmentation by Type:

2D SPI Equipment

3D SPI Equipment

Other

#### Global SPI Equipment for Electronics Manufacturing Market, Segmentation by Inspection Technology:

Benchtop Testers

Inline SPI Systems

Other

#### Global SPI Equipment for Electronics Manufacturing Market, Segmentation by Tested PCB Type:

Standard SMT PCB

Fine-pitch / High-density PCB

Other

#### Global SPI Equipment for Electronics Manufacturing Market, Segmentation by Application:

Consumer Electronics

Automotive Electronics

Industrial and Medical Electronics

Communication Equipment

Other

Companies Profiled:

Koh Young Technology

Nordson

Test Research

ViTrox

MIRTEC

PARMI

PEMTRON

SAKI Corporation

Yamaha Motor

OMRON

Viscom

Mycronic

JUTZE Intelligence Technology

Xiamen Sinictek Intelligent Technology

## Magic-ray Technology

### Key Questions Answered:

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

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