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# Global Vacuum Reflow Soldering Ovens Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Vacuum Reflow Soldering Ovens market size is expected to reach $ 258 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

In 2025, global Vacuum Reflow Soldering Ovens production reached approximately 1,841 units with average price of 90,000 USD/Unit.

A vacuum reflow oven is a piece of thermal processing equipment used in electronics manufacturing that introduces a low-pressure or vacuum environment during the solder melting phase to minimize internal porosity, voids, and gas inclusions within solder joints. The fundamental process involves subjecting printed circuit boards (PCBs), power modules, semiconductor devices, or other electronic components to preheating, soaking, reflow soldering, and cooling stages under a controlled temperature profile. By reducing the chamber pressure while the solder is in a molten state, volatiles from the solder paste and gas bubbles trapped within the joints are allowed to escape, thereby enhancing the density, thermal conductivity, mechanical strength, and long-term reliability of the solder joints.

In the vacuum reflow process, the vacuum stage—designed to eliminate voids from the molten solder—immediately follows the actual melting phase. Vacuum reflow oven systems have been proven to significantly reduce void rates across all types of electronic components, typically achieving levels below 5%. These ovens offer substantial advantages in electronics manufacturing by creating a low-pressure environment during soldering that effectively eliminates gas pockets and voids. This results in improved mechanical strength, heat dissipation, and electrical reliability—factors that are particularly critical for high-density, fine-pitch components,

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automotive electronics, and power devices, where long-term performance and durability are paramount.

The upstream supply chain for vacuum reflow ovens encompasses components such as stainless steel oven bodies, high-temperature insulation materials, heaters, circulation fans, vacuum chambers, vacuum pumps, vacuum valves, pressure sensors, oxygen analyzers, nitrogen generation and delivery systems, conveyor chains, rails, motors, servo drives, programmable logic controllers (PLCs), industrial computers, and temperature sensors. Key performance parameters—such as the vacuum pump's pumping speed and ultimate pressure, chamber sealing integrity, heating uniformity, pressure control precision, and the stability of the transport mechanism—directly influence the equipment's void-removal capability, production throughput, and process repeatability.

The upstream sector also includes process materials such as solder paste, solder foils, solder preforms, flux, and formic acid. Factors such as the volatilization characteristics, melting points, wetting capabilities, and residue levels of these materials influence the design of the vacuum profile. For flux-free or low-residue soldering applications, some systems introduce formic acid, hydrogen, or other reducing atmospheres to remove oxides from metal surfaces. Vacuum processing parameters must be optimized in conjunction with temperature profiles, solder systems, component structures, and substrate dimensions; excessively rapid depressurization can lead to solder spatter, component displacement, or violent flux volatilization.

The midstream of the industry chain primarily comprises manufacturers of vacuum reflow ovens, vacuum system suppliers, automation integrators, process software developers, and after-sales service providers. Equipment manufacturers are responsible for thermal field design, vacuum chamber architecture, conveyor systems, atmosphere management, residue handling, control algorithms, and full-line integration. Key players currently include Kurtz Ersa, Rehm Thermal Systems, Heller Industries, BTU International, SMT Maschinen, PINK Thermosysteme, budatec, Palomar Technologies, Eightech Tectron, Hirata, Senju Metal Industry, and other specialized manufacturers. These companies have established differentiated market positions across areas such as high-volume in-line production, power module packaging, vapor phase soldering, and R&D/pilot-scale equipment. Ersa, Rehm, and Heller have all launched in-line vacuum reflow systems designed for high-volume electronics manufacturing.

Downstream applications primarily span sectors such as automotive electronics,

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industrial controls, consumer electronics, communications equipment, aerospace, medical electronics, PV inverters, energy storage converters, rail transportation, power semiconductors, and advanced packaging. The equipment is typically installed within surface mount technology (SMT) production lines, power module packaging lines, or semiconductor back-end processing lines, where it interfaces with solder paste printers, pick-and-place machines, automated optical inspection (AOI) systems, in-circuit testing (ICT) equipment, and material tracking systems. Given that vacuum reflow equipment entails higher purchase prices, energy consumption, and maintenance costs compared to standard reflow ovens, its application is largely concentrated on products requiring low solder joint voiding rates, superior heat dissipation, and high reliability.

Global key players of vacuum reflow soldering ovens include Rehm Thermal Systems, Kurtz Ersa, Heller Industries, etc. The top five players hold a share over 65%. Asia-Pacific is the largest market, has a share about 69%, followed by North America and Europe, with share 13% and 12%, separately.

The market drivers for Vacuum Reflow Soldering Ovens include the growing demand for high-reliability electronics in sectors like aerospace, automotive, and medical devices; the trend towards miniaturization of electrical components that requires precise soldering methods; the implementation of advanced manufacturing technologies such as Industry 4.0 in the electronics manufacturing industry; the need to meet stringent quality requirements like IPC-A-610; the increased use of lead-free solder alloys due to environmental concerns; and the expansion of the electronics industry in emerging economies, all of which drive the demand for these ovens to ensure high-quality and dependable solder joints for printed circuit boards.

Power semiconductors such as IGBT, SiC, and MOSFET are widely used in electric vehicles, and these devices have extremely high requirements for soldering quality and thermal conductivity. Vacuum reflow soldering can effectively remove solder joint pores, reduce thermal resistance, and improve reliability. It is an important process equipment for high-power device packaging.

Commercial aerospace (such as satellites, rockets, and payload electronic modules) have extremely high requirements for the reliability and thermal shock resistance of electronic components. The solder joints must be free of pores, cold solder joints, and have high thermal conductivity to ensure stable operation in extreme environments (vacuum, radiation, and drastic temperature differences). Vacuum reflow soldering is the core process to meet this demand. SpaceX, Blue Origin, Starlink and other projects are promoting the transition from military-grade small batches to industrial-grade large

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batch manufacturing, and welding equipment must also develop from experimental level to batch, automated, and highly reliable. Vacuum reflow soldering is located at the technical intersection of "high reliability + industrialization".

The demand for vacuum reflow ovens driven by AI represents an indirect yet distinct form of structural growth. While AI servers do not mandate the use of vacuum reflow soldering for every PCB, the significantly heightened requirements for power density and reliability in components—such as GPU accelerator cards, high-power server power supplies, backup power systems, data center power conversion equipment, and liquid cooling system control modules—have expanded the scope of application for low-voiding soldering processes.

## Report Scope

This report studies the global Vacuum Reflow Soldering Ovens production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Vacuum Reflow Soldering Ovens 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 Vacuum Reflow Soldering Ovens that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Vacuum Reflow Soldering Ovens total production and demand, 2021-2032, (Units)

Global Vacuum Reflow Soldering Ovens total production value, 2021-2032, (USD Million)

Global Vacuum Reflow Soldering Ovens production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Vacuum Reflow Soldering Ovens consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Vacuum Reflow Soldering Ovens domestic production,

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consumption, key domestic manufacturers and share

Global Vacuum Reflow Soldering Ovens production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Vacuum Reflow Soldering Ovens production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Vacuum Reflow Soldering Ovens production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Vacuum Reflow Soldering Ovens 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 Kurtz Ersa Group, Rehm Thermal Systems GmbH, Heller Industries, Inc., BTU International, Inc., SMT Maschinen- und Vertriebs GmbH & Co. KG, PINK GmbH Thermosysteme, budatec GmbH, Palomar Technologies, UniTemp GmbH, IBL L?ttechnik GmbH, 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 Vacuum Reflow Soldering Ovens 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 Vacuum Reflow Soldering Ovens Market, By Region:

United States

China

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Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Vacuum Reflow Soldering Ovens Market, Segmentation by Type:

Less than 10 Heating Zones

10-20 Heating Zones

More than 20 Heating Zones

## Global Vacuum Reflow Soldering Ovens Market, Segmentation by Operation Mode:

Inline Vacuum Reflow Oven

Offline Vacuum Reflow Oven

## Global Vacuum Reflow Soldering Ovens Market, Segmentation by Technology:

Pure Nitrogen Vacuum Reflow

Formic Acid + Nitrogen Vacuum Reflow

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## Global Vacuum Reflow Soldering Ovens Market, Segmentation by Application:

Telecommunication

Consumer Electronics

Automotive Electronics

Aerospace

AI Hardware

Others

## Companies Profiled:

Kurtz Ersa Group

Rehm Thermal Systems GmbH

Heller Industries, Inc.

BTU International, Inc.

SMT Maschinen- und Vertriebs GmbH & Co. KG

PINK GmbH Thermosysteme

budatec GmbH

Palomar Technologies

UniTemp GmbH

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IBL L?ttechnik GmbH

ASSCON Systemtechnik-Elektronik GmbH

Eightech Tectron Co., Ltd.

Hirata Corporation

Senju Metal Industry Co., Ltd.

Shinko Seiki Co., Ltd.

Origin Co., Ltd.

T-GLOBAL Co., Ltd.

Beijing Torch Smt Incorporated Company

Beijing Chenglian Kaida Technology Co., Ltd

JT Automation Equipment Co., Ltd.

Shenzhen HB Technology Co., Ltd.

HM SEMICONDUCTOR (WUXI) CO., LTD.

Guangdong Huaxin Semiconductor Technology Co., Ltd

## Key Questions Answered:

1. How big is the global Vacuum Reflow Soldering Ovens market?
2. What is the demand of the global Vacuum Reflow Soldering Ovens market?
3. What is the year over year growth of the global Vacuum Reflow Soldering Ovens market?
4. What is the production and production value of the global Vacuum Reflow Soldering Ovens market?
5. Who are the key producers in the global Vacuum Reflow Soldering Ovens market?
6. What are the growth factors driving the market demand?

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