

Global Air-Coupled Ultrasonic Testing System Market Growth 2026-2032

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Abstracts

The global Air-Coupled Ultrasonic Testing System market size is predicted to grow from US\$ 155 million in 2025 to US\$ 243 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

Air-Coupled Ultrasonic Testing Systems are non-contact ultrasonic inspection systems that transmit and receive ultrasonic waves through air instead of using liquid couplants or direct-contact probes. They are used to detect delamination, bonding defects, voids, cracks, density variation, impact damage, thickness nonuniformity, and internal discontinuities in composites, foams, honeycomb panels, wood products, ceramics, aerospace structures, battery materials, and advanced industrial materials. A typical system includes air-coupled ultrasonic transducers, pulser-receivers, motion scanners, signal amplifiers, data acquisition modules, imaging software, positioning systems, fixtures, and shielding structures. This category excludes conventional contact ultrasonic flaw detectors, immersion ultrasonic systems, standalone probes, X-ray inspection systems, acoustic emission systems, and general nondestructive testing services. The industrial chain of Air-Coupled Ultrasonic Testing Systems includes upstream suppliers of air-coupled transducers, piezoelectric materials, matching layers, pulser-receiver circuits, amplifiers, data acquisition boards, motion control modules, linear stages, robotic scanning components, sensors, cables, electronic boards, shielding materials, fixtures, software modules, industrial computers, metal frames, precision machined parts, calibration blocks, and packaging materials. The midstream consists of nondestructive testing equipment manufacturers that design and assemble ultrasonic transmission modules, receiving systems, scanning platforms, imaging algorithms, signal-processing software, automation interfaces, safety enclosures, and customized inspection configurations for different material types and production environments. Downstream users include aerospace manufacturers, composite material

producers, battery material companies, automotive suppliers, research institutes, universities, wood-product manufacturers, ceramic producers, rail and infrastructure laboratories, and industrial quality-control departments.

The Air-Coupled Ultrasonic Testing System market is a specialized nondestructive testing market rather than a broad ultrasonic flaw-detection equipment market. Demand is supported by composites, aerospace structures, lightweight materials, battery materials, wood products, ceramics, and advanced manufacturing quality control. Demand quality is strongest where liquid couplants or contact probes are unsuitable because of surface contamination risk, fragile materials, porous structures, curved parts, or production-line automation requirements. Buyers focus on signal sensitivity, transducer performance, scanning stability, defect-imaging quality, software interpretation, automation compatibility, inspection speed, and repeatability across difficult materials. The market favors suppliers that combine ultrasonic hardware, signal-processing capability, application method development, and production-line integration. Main challenges include weak signal transmission through air, material-specific calibration difficulty, high system customization, competition from other inspection methods, and limited adoption outside high-value industrial applications. In 2025, global Air-Coupled Ultrasonic Testing System production reached approximately 1.07 thousand units, with an average global market price of around US\$148,000 per unit. The gross profit margin of major companies in the industry ranged from 31% to 49%. In 2025, the global production capacity of Air-Coupled Ultrasonic Testing Systems was approximately 1.42 thousand units.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Air-Coupled Ultrasonic Testing System Industry Forecast" looks at past sales and reviews total world Air-Coupled Ultrasonic Testing System sales in 2025, providing a comprehensive analysis by region and market sector of projected Air-Coupled Ultrasonic Testing System sales for 2026 through 2032. With Air-Coupled Ultrasonic Testing System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air-Coupled Ultrasonic Testing System industry.

This Insight Report provides a comprehensive analysis of the global Air-Coupled Ultrasonic Testing System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air-Coupled Ultrasonic Testing System portfolios and capabilities, market

entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air-Coupled Ultrasonic Testing System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air-Coupled Ultrasonic Testing System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Air-Coupled Ultrasonic Testing System.

This report presents a comprehensive overview, market shares, and growth opportunities of Air-Coupled Ultrasonic Testing System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Through-Transmission Systems

Single-Sided Pitch-Catch Systems

Single-Sided Pulse-Echo Systems

Multi-Mode Systems

Segmentation by Scanning Motion Architecture:

Handheld Free-Motion Scanning Systems

Cartesian Gantry Scanning Systems

Robot-Based Scanning Systems

Conveyor In-Line Scanning Systems

Fixed-Point Non-Scanning Systems

Segmentation by Transducer Nominal Center Frequency:

Up to 100 kHz

Over 100 kHz and Up to 500 kHz

Over 500 kHz and Up to 1 MHz

Over 1 MHz

Segmentation by Application:

Aerospace Manufacturing

Automotive Manufacturing

Battery Manufacturing

Rail Equipment Manufacturing

Wind Energy Equipment Manufacturing

Electronic Equipment Manufacturing

Research and Testing Institutions

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

SONOTEC GmbH

Hillger NDT GmbH

DASEL, S.L.

I-Deal Technologies GmbH & Co. KG

STARMANS electronics, s.r.o.

Quality Material Inspection, Inc.

Airstar Inc.

UTEX Scientific Instruments Inc.

NDT Systems Inc.

PTI Corporation

The Ultran Group, Inc.

TPAC

JAPAN PROBE CO., LTD.

GNES Corporation

Hakko Automation Co., Ltd.

TECLAB (CHINA) LIMITED

Beijing Caisheng Technology Co., Ltd.

Suzhou Phaserise Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air-Coupled Ultrasonic Testing System market?

What factors are driving Air-Coupled Ultrasonic Testing System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Air-Coupled Ultrasonic Testing System market opportunities vary by end market size?

How does Air-Coupled Ultrasonic Testing System break out by Type, by Application?

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