

Global Automated X-ray Inspection (AXI) Market Growth 2026-2032

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Abstracts

The global Automated X-ray Inspection (AXI) market size is predicted to grow from US\$ 618 million in 2025 to US\$ 1154 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

In 2025, global Automated X-ray Inspection (AXI) production reached approximately 3,924 units, with an average global market price of around K US\$ 160.93 per unit.

X-ray inspection technology, commonly referred to as Automated X-ray inspection or Automated X-ray Inspection (AXI), is a technique used to examine hidden features of target objects or products that use X-rays as a source. Generally, there are manual x-ray inspection and automated X-ray inspection, we only focus on the Automated X-ray Inspection (AXI) market.

In the SMT industry, Automated X-ray inspection, or AXI, is a technology that uses X-rays to examine the features of a printed circuit board, semiconductor package, or power modules that are hidden from view and therefore cannot be captured by automated optical inspection (AOI), which uses visible light as its source.

X-ray inspection is also widely used in lots of applications such as medical, industrial control, and aerospace for control the quality of board assemblies and to analyze defects of hidden solder joints. X-ray has a unique advantage that is materials absorb X-rays proportional to their atomic weight and all materials absorb the X-ray radiation differently depending on their density, atomic number and thickness. Generally speaking, materials made of heavier elements absorb more X-rays and are easily imaged, while materials made of lighter elements are more transparent to X-rays.

At present, AXI technology has been widely used in product detection in lithium battery, semiconductor, solar photovoltaic, integrated circuit, electronic manufacturing, PCB, LED, die casting and other industries.

Automated X-ray Inspection (AXI) is an advanced, automated non-destructive testing solution leveraging X-ray imaging to reveal internal structures and hidden defects within complex manufactured products. In sectors such as PCB assembly, semiconductor packaging, lithium battery production, photovoltaic modules, and die-cast parts, AXI systems expose defects—such as voids, misaligned assemblies, shorts, and cracks—that are undetectable by traditional surface inspection methods like automated optical inspection (AOI). An AXI inspection platform typically integrates a high-energy X-ray source, precision sample motion system, and high-resolution detector with sophisticated software to deliver real-time, high-quality grayscale images. Through automation and advanced analytics, AXI enables reliable, traceable defect detection and statistical quality control, making it a pivotal component of modern intelligent manufacturing quality assurance.

The manufacturing model for Automated X-ray Inspection (AXI) equipment typically integrates internal development of core imaging technology (X-ray sources, detectors, motion control) with strategic external sourcing of specialized components. High-end AXI systems are often modular and configurable to support diverse applications such as 2D, 3D, and computed tomography (CT) inspection. Leading global players—including ViTrox, Omron, Nordson, Viscom, and Nikon—operate production facilities within key industrial hubs in China, Japan, Germany, and the United States. Reported gross margins for advanced AXI products generally hover around 40%, with higher margins achievable in premium segments due to technological complexity and strong quality requirements from customers. The AXI industry supply chain encompasses upstream component technology providers (X-ray sources, detector chips, motion control systems, software/AI imaging), manufacturing integrators, and downstream customers in electronics, semiconductors, lithium batteries, and photovoltaic manufacturing, with further integration into MES and quality traceability systems.

Market Development Opportunities & Main Driving Factors

As global manufacturing evolves toward higher automation and reliability, Automated X-ray Inspection (AXI) technology is entering an unprecedented growth phase. In electronics and semiconductor manufacturing, the proliferation of advanced packaging formats such as BGAs and CSPs highlights internal solder and structural defects that optical inspection cannot detect, positioning AXI as a critical quality control

technology. In the burgeoning new energy sector—particularly lithium battery modules and electric power systems—AXI's role in detecting internal defects and evaluating weld integrity significantly enhances product safety and competitiveness. Furthermore, continued expansion in automotive electronics, industrial automation, and smart consumer devices drives robust demand for high-precision inspection solutions, underpinning sustained market expansion.

Market Challenges, Risks, & Restraints

Despite broad market opportunities, the AXI industry faces notable challenges and risks. The development and production of high-precision AXI systems require substantial capital and technological investment, creating high barriers to entry for smaller players. Rapid technology evolution—especially in AI-enabled image analytics, 3D CT imaging, and real-time data processing—necessitates continuous R&D investment to maintain competitive advantage. Additionally, insufficient standardization in downstream production line integration and data connectivity can slow AXI deployment and limit realization of its full value.

Downstream Demand Trends

Looking ahead, downstream demand for AXI is evolving in multiple dimensions. In electronics manufacturing, demand for higher resolution and faster inspection speeds is accelerating the transition from 2D to advanced 3D/CT and AI-augmented inspection technologies. In lithium battery and automotive electronics sectors, the need for safety and consistency drives deeper integration of AXI with MES/SAP production management systems. Meanwhile, as smart manufacturing and Industry 4.0 initiatives expand across Asia, Europe, and North America, AXI adoption in emerging sectors such as new energy, aerospace, and high-end industrial equipment is rising sharply, offering cross-industry growth opportunities.

Automated X-ray Inspection (AXI) is used in a wide range of industries and applications, predominantly with two major goals: Process optimization and Anomaly detection. It can be divided into 2D AXI and 3D AXI. Both these can be operated off line and therefore make the inspection process easy. Some devices however can be used online. The choice of offline versus online devices typically depends on the amount of inspection required. In cases where there are large quantities to inspect and the level of inspection is complex, online devices are generally used. While a two-dimensional system can display 2D images of components from both sides, a three-dimensional system can generate images of cross sections. 3D systems can also combine images of a cross

section in a method known as laminography.

Global key Automated X-ray Inspection (AXI) players cover ViTrox, Nordson, Viscom, Unicomp Technology, Innometry, NIKON, Omron, Waygate Technologies (Baker Hughes), Seamark ZM, Comet Yxlon, Zhengye Technology, Test Research Inc. (TRI), XAVIS Co., Ltd., ZEISS, Saki Corporation, SEC, Techvalley, Scienscope, SXRAY, DC Precision, Goepel Electronic, Creative Electron, etc. In terms of revenue, the global three largest companies occupies occupied for a share nearly 27% in 2025.

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

This Insight Report provides a comprehensive analysis of the global Automated X-ray Inspection (AXI) 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 Automated X-ray Inspection (AXI) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automated X-ray Inspection (AXI) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automated X-ray Inspection (AXI) 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 Automated X-ray Inspection (AXI).

This report presents a comprehensive overview, market shares, and growth opportunities of Automated X-ray Inspection (AXI) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Inline AXI

Offline AXI

Segmentation by Technology Type:

2D AXI

3D AXI

Segmentation by Production Line Type:

Large-volume Production

Prototype and Small Quantities

Segmentation by Application:

PCB Industry

Integrated Circuits

Battery Industry

LED & Casting

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.

ViTrox

Nordson

Viscom

Unicomp Technology

Innometry

NIKON

Omron

Waygate Technologies (Baker Hughes)

Seamark ZM

Comet Yxlon

Zhengye Technology

Test Research Inc. (TRI)

XAVIS Co., Ltd.

ZEISS

Saki Corporation

SEC

Techvalley

Scienscope

SXRAY

DC Precision

Goepel Electronic

Creative Electron

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automated X-ray Inspection (AXI) market?

What factors are driving Automated X-ray Inspection (AXI) market growth, globally and by region?

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

How do Automated X-ray Inspection (AXI) market opportunities vary by end market size?

How does Automated X-ray Inspection (AXI) break out by Type, by Application?

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