

Global Electronic Manufacturing X-ray Inspection Equipment Market Growth 2026-2032

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Abstracts

The global Electronic Manufacturing X-ray Inspection Equipment market size is predicted to grow from US\$ 425 million in 2025 to US\$ 813 million in 2032; it is expected to grow at a CAGR of 8.8% from 2026 to 2032.

In 2025, global Electronic Manufacturing X-ray Inspection Equipment production reached approximately 2,961 units, with an average global market price of around K US\$ 146.84 per unit.

X-ray inspection equipment can perform comprehensive inspection of PCBs, detecting defects not only on the surface but also internally. This inspection method is highly precise, capable of detecting minute defects and deformations, and is more reliable and accurate than traditional visual and mechanical inspection.

In the electronics manufacturing industry, X-ray inspection equipment has become a commonly used inspection tool. It can be applied to various types of PCBs, including single-layer, double-layer, and multi-layer PCBAs, as well as various types of electronic components such as chips, capacitors, and inductors. X-ray inspection equipment is also used in the assembly and repair of electronic products to ensure their quality and reliability.

Currently, AXI inspection technology is widely used in product inspection in industries such as lithium batteries, semiconductors, solar photovoltaics, integrated circuits, electronics manufacturing, PCBs, LEDs, and die castings.

In this report, Electronic Manufacturing X-ray Inspection Equipment mainly refers to X-ray inspection equipment used in the PCB and semiconductor industries.

Electronic Manufacturing X-ray Inspection Equipment comprises non-destructive inspection and quality-data systems used across electronics manufacturing (PCB/PCBA, semiconductor packaging/assembly, power modules, connectors, and precision devices). It combines an X-ray source (microfocus/high-power), high-resolution detectors, precision motion and shielding, with 2D radiography, 2.5D tomosynthesis/laminography, and 3D CT reconstruction plus automated defect recognition and quantitative analytics. It addresses hidden internal defects that optical inspection cannot reliably judge, including solder voiding/insufficient solder, bridging, cracks and foreign materials in hidden joints (BGA/QFN/Flip-Chip), and registration/via-related issues in multilayer/HDI/substrate boards. As advanced packaging becomes miniaturized, stacked and high-density, CT capability, AI-assisted decisioning, and closed-loop traceability data increasingly form the foundation of high-reliability delivery.

The dominant manufacturing model is “modular platform + application-engineering delivery.” OEMs platformize the tube/detector/motion/shielding and industrial computing chain, then configure 2D/2.5D/3D CT and in-line/off-line deployment, build defect libraries and decision rules, and complete radiation safety and metrology calibration, process capability validation, and MES/QMS traceability integration. Leaders differentiate via software capability, faster NPI/delivery, and continual upgrades in imaging software and tube/detector technology.

Gross margin is commonly ~35%–55%, trending higher with CT capability, richer software/AI licensing, and higher service/spares penetration (industry estimate).

The value chain spans upstream components (X-ray tubes & HV, detectors, motion/shielding, industrial computing, reconstruction/AI), midstream system integration and inspection/SPC software plus service, and downstream PCB & SMT/EMS, semiconductor packaging/modules, automotive & EV power modules, consumer/comms manufacturing, and FA/3rd-party labs. Government programs accelerating electronics manufacturing digital transformation reinforce long-term demand for in-line inspection and data-driven traceability.

Market Development Opportunities & Drivers / Challenges & Risks / Downstream Demand Trends

Electronics manufacturing is entering a re-pricing cycle driven by high-density interconnect and high-reliability delivery. Brokerage research indicates AI servers add GPU board sets and raise bandwidth requirements, pushing PCB layer counts and

manufacturing requirements upward; the cost of hidden defects rises accordingly, making X-ray inspection a process-critical quality infrastructure rather than a sampling tool. In parallel, advanced packaging formats (BGA/CSP/Flip-Chip/QFN) increasingly rely on hidden joint integrity, and research notes that defects beyond optical coverage require X-ray inspection, accelerating penetration of AXI/CT-type solutions in high-end electronics. Government targets for digital transformation and key-process automation further strengthen the long-term certainty of in-line inspection and end-to-end traceability investment.

Barriers are not limited to imaging hardware but extend to engineering industrialization and scalable delivery. Stable tubes/detectors and precision motion set the imaging ceiling, demanding supply-chain consistency and rigorous reliability validation. Meanwhile, 3D/CT reconstruction and automated judgment require high-quality labeled data and process priors, creating cold-start, misclassification, and maintenance costs when scaling across customers. Annual-report disclosures also show accelerated investment in software capability and tube/detector technology upgrades, alongside shorter development cycles—raising the bar for sustained R&D and organizational execution. Radiation safety, metrology, line-stop risk, and global service capability also materially affect purchasing decisions and acceptance cycles.

Demand is shifting from “seeing defects” to “quantifying defects and closing the loop.” In-line, 2D remains essential for throughput screening, while 2.5D/3D CT adoption grows to enhance layer separation and quantitative capability—especially for voiding distributions, crack morphology, foreign-material localization, and batch traceability—driving deeper integration with SPC and root-cause analytics. Off-line CT and failure analysis are moving earlier into NPI to accelerate yield ramp. Meanwhile, next-generation systems emphasize software capability and imaging-chain upgrades, signaling competition shifting from single-image clarity toward decision consistency, low false calls, traceability, and replicable deployment excellence.

Global key Electronic Manufacturing X-ray Inspection Equipment players cover ViTrox, Viscom, Nordson, Omron, Unicomp Technology, NIKON, Waygate Technologies (Baker Hughes), Comet Yxlon, Test Research Inc. (TRI), Seamark ZM, Zhengye Technology, ZEISS, Saki Corporation, XAVIS Co., Ltd., SEC, Techvalley, Goepel Electronic, Scionscope, SXRAY, Creative Electron, etc. In terms of revenue, the global three largest companies occupies occupied for a share nearly 39% in 2025.

LP Information, Inc. (LPI) ' newest research report, the “Electronic Manufacturing X-ray Inspection Equipment Industry Forecast” looks at past sales and reviews total world

Electronic Manufacturing X-ray Inspection Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Electronic Manufacturing X-ray Inspection Equipment sales for 2026 through 2032. With Electronic Manufacturing X-ray Inspection Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Electronic Manufacturing X-ray Inspection Equipment industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Electronic Manufacturing X-ray Inspection Equipment 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 Electronic Manufacturing X-ray Inspection Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Electronic Manufacturing X-ray Inspection Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Inline X-ray Inspection Equipment

Offline X-ray Inspection Equipment

Segmentation by Technology Type:

2D X-ray Inspection Equipment

3D X-ray Inspection Equipment

Segmentation by Production Line Type:

Large-volume Production

Prototype and Small Quantities

Segmentation by Application:

PCB Industry

Integrated Circuits

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

Viscom

Nordson

Omron

Unicomp Technology

NIKON

Waygate Technologies (Baker Hughes)

Comet Yxlon

Test Research Inc. (TRI)

Seamark ZM

Zhengye Technology

ZEISS

Saki Corporation

XAVIS Co., Ltd.

SEC

Techvalley

Goepel Electronic

Scienscope

SXRAY

Creative Electron

Key Questions Addressed in this Report

What is the 10-year outlook for the global Electronic Manufacturing X-ray Inspection

Equipment market?

What factors are driving Electronic Manufacturing X-ray Inspection Equipment market growth, globally and by region?

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

How do Electronic Manufacturing X-ray Inspection Equipment market opportunities vary by end market size?

How does Electronic Manufacturing X-ray Inspection Equipment break out by Type, by Application?

The report requires updating with new data and is sent in 48 hours after order is placed.

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Electronic Manufacturing X-ray Inspection Equipment Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Electronic Manufacturing X-ray Inspection Equipment by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Electronic Manufacturing X-ray Inspection Equipment by Country/Region, 2021, 2025 & 2032

2.2 Electronic Manufacturing X-ray Inspection Equipment Segment by Type

2.2.1 Inline X-ray Inspection Equipment

2.2.2 Offline X-ray Inspection Equipment

2.2.3 Electronic Manufacturing X-ray Inspection Equipment Sales by Type

2.2.3.1 Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)

2.2.3.2 Global Electronic Manufacturing X-ray Inspection Equipment Revenue and Market Share by Type (2021-2026)

2.2.3.3 Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Type (2021-2026)

2.3 Electronic Manufacturing X-ray Inspection Equipment Segment by Technology Type

2.3.1 2D X-ray Inspection Equipment

2.3.2 3D X-ray Inspection Equipment

2.3.3 Electronic Manufacturing X-ray Inspection Equipment Sales by Technology Type

2.3.3.1 Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Technology Type (2021-2026)

2.3.3.2 Global Electronic Manufacturing X-ray Inspection Equipment Revenue and

Market Share by Technology Type (2021-2026)

2.3.3.3 Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Technology Type (2021-2026)

2.4 Electronic Manufacturing X-ray Inspection Equipment Segment by Production Line Type

2.4.1 Large-volume Production

2.4.2 Prototype and Small Quantities

2.4.3 Electronic Manufacturing X-ray Inspection Equipment Sales by Production Line Type

2.4.3.1 Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Production Line Type (2021-2026)

2.4.3.2 Global Electronic Manufacturing X-ray Inspection Equipment Revenue and Market Share by Production Line Type (2021-2026)

2.4.3.3 Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Production Line Type (2021-2026)

2.5 Electronic Manufacturing X-ray Inspection Equipment Segment by Application

2.5.1 PCB Industry

2.5.2 Integrated Circuits

2.5.3 Others

2.5.4 Electronic Manufacturing X-ray Inspection Equipment Sales by Application

2.5.4.1 Global Electronic Manufacturing X-ray Inspection Equipment Sale Market Share by Application (2021-2026)

2.5.4.2 Global Electronic Manufacturing X-ray Inspection Equipment Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Electronic Manufacturing X-ray Inspection Equipment Breakdown Data by Company

3.1.1 Global Electronic Manufacturing X-ray Inspection Equipment Annual Sales by Company (2021-2026)

3.1.2 Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Company (2021-2026)

3.2 Global Electronic Manufacturing X-ray Inspection Equipment Annual Revenue by Company (2021-2026)

3.2.1 Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Company (2021-2026)

- 3.2.2 Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Company (2021-2026)
- 3.3 Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Company
- 3.4 Key Manufacturers Electronic Manufacturing X-ray Inspection Equipment Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Electronic Manufacturing X-ray Inspection Equipment Product Location Distribution
 - 3.4.2 Players Electronic Manufacturing X-ray Inspection Equipment Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ELECTRONIC MANUFACTURING X-RAY INSPECTION EQUIPMENT BY GEOGRAPHIC REGION

- 4.1 World Historic Electronic Manufacturing X-ray Inspection Equipment Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Electronic Manufacturing X-ray Inspection Equipment Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Electronic Manufacturing X-ray Inspection Equipment Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Electronic Manufacturing X-ray Inspection Equipment Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Electronic Manufacturing X-ray Inspection Equipment Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Electronic Manufacturing X-ray Inspection Equipment Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Electronic Manufacturing X-ray Inspection Equipment Sales Growth
- 4.4 APAC Electronic Manufacturing X-ray Inspection Equipment Sales Growth
- 4.5 Europe Electronic Manufacturing X-ray Inspection Equipment Sales Growth
- 4.6 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales Growth

5 AMERICAS

- 5.1 Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Country

5.1.1 Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Country (2021-2026)

5.1.2 Americas Electronic Manufacturing X-ray Inspection Equipment Revenue by Country (2021-2026)

5.2 Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026)

5.3 Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Region

6.1.1 APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Region (2021-2026)

6.1.2 APAC Electronic Manufacturing X-ray Inspection Equipment Revenue by Region (2021-2026)

6.2 APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026)

6.3 APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Electronic Manufacturing X-ray Inspection Equipment by Country

7.1.1 Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Country (2021-2026)

7.1.2 Europe Electronic Manufacturing X-ray Inspection Equipment Revenue by Country (2021-2026)

7.2 Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026)

7.3 Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment by Country

8.1.1 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales by Country (2021-2026)

8.1.2 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Revenue by Country (2021-2026)

8.2 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026)

8.3 Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Electronic Manufacturing X-ray Inspection Equipment

10.3 Manufacturing Process Analysis of Electronic Manufacturing X-ray Inspection Equipment

10.4 Industry Chain Structure of Electronic Manufacturing X-ray Inspection Equipment

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Electronic Manufacturing X-ray Inspection Equipment Distributors

11.3 Electronic Manufacturing X-ray Inspection Equipment Customer

12 WORLD FORECAST REVIEW FOR ELECTRONIC MANUFACTURING X-RAY INSPECTION EQUIPMENT BY GEOGRAPHIC REGION

12.1 Global Electronic Manufacturing X-ray Inspection Equipment Market Size Forecast by Region

12.1.1 Global Electronic Manufacturing X-ray Inspection Equipment Forecast by Region (2027-2032)

12.1.2 Global Electronic Manufacturing X-ray Inspection Equipment Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Electronic Manufacturing X-ray Inspection Equipment Forecast by Type (2027-2032)

12.7 Global Electronic Manufacturing X-ray Inspection Equipment Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 ViTrox

13.1.1 ViTrox Company Information

13.1.2 ViTrox Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

13.1.3 ViTrox Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 ViTrox Main Business Overview

- 13.1.5 ViTrox Latest Developments
- 13.2 Viscom
 - 13.2.1 Viscom Company Information
 - 13.2.2 Viscom Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.2.3 Viscom Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Viscom Main Business Overview
 - 13.2.5 Viscom Latest Developments
- 13.3 Nordson
 - 13.3.1 Nordson Company Information
 - 13.3.2 Nordson Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.3.3 Nordson Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Nordson Main Business Overview
 - 13.3.5 Nordson Latest Developments
- 13.4 Omron
 - 13.4.1 Omron Company Information
 - 13.4.2 Omron Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.4.3 Omron Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Omron Main Business Overview
 - 13.4.5 Omron Latest Developments
- 13.5 Unicomp Technology
 - 13.5.1 Unicomp Technology Company Information
 - 13.5.2 Unicomp Technology Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.5.3 Unicomp Technology Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Unicomp Technology Main Business Overview
 - 13.5.5 Unicomp Technology Latest Developments
- 13.6 NIKON
 - 13.6.1 NIKON Company Information
 - 13.6.2 NIKON Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.6.3 NIKON Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.6.4 NIKON Main Business Overview
- 13.6.5 NIKON Latest Developments
- 13.7 Waygate Technologies (Baker Hughes)
 - 13.7.1 Waygate Technologies (Baker Hughes) Company Information
 - 13.7.2 Waygate Technologies (Baker Hughes) Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.7.3 Waygate Technologies (Baker Hughes) Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Waygate Technologies (Baker Hughes) Main Business Overview
 - 13.7.5 Waygate Technologies (Baker Hughes) Latest Developments
- 13.8 Comet Yxlon
 - 13.8.1 Comet Yxlon Company Information
 - 13.8.2 Comet Yxlon Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.8.3 Comet Yxlon Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Comet Yxlon Main Business Overview
 - 13.8.5 Comet Yxlon Latest Developments
- 13.9 Test Research Inc. (TRI)
 - 13.9.1 Test Research Inc. (TRI) Company Information
 - 13.9.2 Test Research Inc. (TRI) Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.9.3 Test Research Inc. (TRI) Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Test Research Inc. (TRI) Main Business Overview
 - 13.9.5 Test Research Inc. (TRI) Latest Developments
- 13.10 Seamark ZM
 - 13.10.1 Seamark ZM Company Information
 - 13.10.2 Seamark ZM Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.10.3 Seamark ZM Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Seamark ZM Main Business Overview
 - 13.10.5 Seamark ZM Latest Developments
- 13.11 Zhengye Technology
 - 13.11.1 Zhengye Technology Company Information
 - 13.11.2 Zhengye Technology Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.11.3 Zhengye Technology Electronic Manufacturing X-ray Inspection Equipment

Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Zhengye Technology Main Business Overview

13.11.5 Zhengye Technology Latest Developments

13.12 ZEISS

13.12.1 ZEISS Company Information

13.12.2 ZEISS Electronic Manufacturing X-ray Inspection Equipment Product

Portfolios and Specifications

13.12.3 ZEISS Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 ZEISS Main Business Overview

13.12.5 ZEISS Latest Developments

13.13 Saki Corporation

13.13.1 Saki Corporation Company Information

13.13.2 Saki Corporation Electronic Manufacturing X-ray Inspection Equipment

Product Portfolios and Specifications

13.13.3 Saki Corporation Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Saki Corporation Main Business Overview

13.13.5 Saki Corporation Latest Developments

13.14 XAVIS Co., Ltd.

13.14.1 XAVIS Co., Ltd. Company Information

13.14.2 XAVIS Co., Ltd. Electronic Manufacturing X-ray Inspection Equipment Product

Portfolios and Specifications

13.14.3 XAVIS Co., Ltd. Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 XAVIS Co., Ltd. Main Business Overview

13.14.5 XAVIS Co., Ltd. Latest Developments

13.15 SEC

13.15.1 SEC Company Information

13.15.2 SEC Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

13.15.3 SEC Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 SEC Main Business Overview

13.15.5 SEC Latest Developments

13.16 Techvalley

13.16.1 Techvalley Company Information

13.16.2 Techvalley Electronic Manufacturing X-ray Inspection Equipment Product

Portfolios and Specifications

- 13.16.3 Techvalley Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.16.4 Techvalley Main Business Overview
- 13.16.5 Techvalley Latest Developments
- 13.17 Goepel Electronic
 - 13.17.1 Goepel Electronic Company Information
 - 13.17.2 Goepel Electronic Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.17.3 Goepel Electronic Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Goepel Electronic Main Business Overview
 - 13.17.5 Goepel Electronic Latest Developments
- 13.18 Scienscope
 - 13.18.1 Scienscope Company Information
 - 13.18.2 Scienscope Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.18.3 Scienscope Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Scienscope Main Business Overview
 - 13.18.5 Scienscope Latest Developments
- 13.19 SXRAY
 - 13.19.1 SXRAY Company Information
 - 13.19.2 SXRAY Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.19.3 SXRAY Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 SXRAY Main Business Overview
 - 13.19.5 SXRAY Latest Developments
- 13.20 Creative Electron
 - 13.20.1 Creative Electron Company Information
 - 13.20.2 Creative Electron Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
 - 13.20.3 Creative Electron Electronic Manufacturing X-ray Inspection Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Creative Electron Main Business Overview
 - 13.20.5 Creative Electron Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Electronic Manufacturing X-ray Inspection Equipment Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Electronic Manufacturing X-ray Inspection Equipment Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Inline X-ray Inspection Equipment
- Table 4. Major Players of Offline X-ray Inspection Equipment
- Table 5. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026) & (Units)
- Table 6. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)
- Table 7. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Type (2021-2026)
- Table 9. Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Type (2021-2026) & (K US\$/Unit)
- Table 10. Major Players of 2D X-ray Inspection Equipment
- Table 11. Major Players of 3D X-ray Inspection Equipment
- Table 12. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Technology Type (2021-2026) & (Units)
- Table 13. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Technology Type (2021-2026)
- Table 14. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Technology Type (2021-2026) & (\$ million)
- Table 15. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Technology Type (2021-2026)
- Table 16. Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Technology Type (2021-2026) & (K US\$/Unit)
- Table 17. Major Players of Large-volume Production
- Table 18. Major Players of Prototype and Small Quantities
- Table 19. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Production Line Type (2021-2026) & (Units)
- Table 20. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Production Line Type (2021-2026)
- Table 21. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by

Production Line Type (2021-2026) & (\$ million)

Table 22. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Production Line Type (2021-2026)

Table 23. Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Production Line Type (2021-2026) & (K US\$/Unit)

Table 24. Global Electronic Manufacturing X-ray Inspection Equipment Sale by Application (2021-2026) & (Units)

Table 25. Global Electronic Manufacturing X-ray Inspection Equipment Sale Market Share by Application (2021-2026)

Table 26. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Application (2021-2026) & (\$ million)

Table 27. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Application (2021-2026)

Table 28. Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 29. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Company (2021-2026) & (Units)

Table 30. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Company (2021-2026)

Table 31. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Company (2021-2026) & (\$ millions)

Table 32. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Company (2021-2026)

Table 33. Global Electronic Manufacturing X-ray Inspection Equipment Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 34. Key Manufacturers Electronic Manufacturing X-ray Inspection Equipment Producing Area Distribution and Sales Area

Table 35. Players Electronic Manufacturing X-ray Inspection Equipment Products Offered

Table 36. Electronic Manufacturing X-ray Inspection Equipment Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 37. New Products and Potential Entrants

Table 38. Market M&A Activity & Strategy

Table 39. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Geographic Region (2021-2026) & (Units)

Table 40. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share Geographic Region (2021-2026)

Table 41. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 42. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Geographic Region (2021-2026)

Table 43. Global Electronic Manufacturing X-ray Inspection Equipment Sales by Country/Region (2021-2026) & (Units)

Table 44. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country/Region (2021-2026)

Table 45. Global Electronic Manufacturing X-ray Inspection Equipment Revenue by Country/Region (2021-2026) & (\$ millions)

Table 46. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Country/Region (2021-2026)

Table 47. Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Country (2021-2026) & (Units)

Table 48. Americas Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country (2021-2026)

Table 49. Americas Electronic Manufacturing X-ray Inspection Equipment Revenue by Country (2021-2026) & (\$ millions)

Table 50. Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026) & (Units)

Table 51. Americas Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026) & (Units)

Table 52. APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Region (2021-2026) & (Units)

Table 53. APAC Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Region (2021-2026)

Table 54. APAC Electronic Manufacturing X-ray Inspection Equipment Revenue by Region (2021-2026) & (\$ millions)

Table 55. APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026) & (Units)

Table 56. APAC Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026) & (Units)

Table 57. Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Country (2021-2026) & (Units)

Table 58. Europe Electronic Manufacturing X-ray Inspection Equipment Revenue by Country (2021-2026) & (\$ millions)

Table 59. Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026) & (Units)

Table 60. Europe Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026) & (Units)

Table 61. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment

Sales by Country (2021-2026) & (Units)

Table 62. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Country (2021-2026)

Table 63. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales by Type (2021-2026) & (Units)

Table 64. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales by Application (2021-2026) & (Units)

Table 65. Key Market Drivers & Growth Opportunities of Electronic Manufacturing X-ray Inspection Equipment

Table 66. Key Market Challenges & Risks of Electronic Manufacturing X-ray Inspection Equipment

Table 67. Key Industry Trends of Electronic Manufacturing X-ray Inspection Equipment

Table 68. Electronic Manufacturing X-ray Inspection Equipment Raw Material

Table 69. Key Suppliers of Raw Materials

Table 70. Electronic Manufacturing X-ray Inspection Equipment Distributors List

Table 71. Electronic Manufacturing X-ray Inspection Equipment Customer List

Table 72. Global Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Region (2027-2032) & (Units)

Table 73. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 74. Americas Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Country (2027-2032) & (Units)

Table 75. Americas Electronic Manufacturing X-ray Inspection Equipment Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 76. APAC Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Region (2027-2032) & (Units)

Table 77. APAC Electronic Manufacturing X-ray Inspection Equipment Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Europe Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Country (2027-2032) & (Units)

Table 79. Europe Electronic Manufacturing X-ray Inspection Equipment Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Country (2027-2032) & (Units)

Table 81. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Global Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Type (2027-2032) & (Units)

Table 83. Global Electronic Manufacturing X-ray Inspection Equipment Revenue

Forecast by Type (2027-2032) & (\$ millions)

Table 84. Global Electronic Manufacturing X-ray Inspection Equipment Sales Forecast by Application (2027-2032) & (Units)

Table 85. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 86. ViTrox Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 87. ViTrox Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 88. ViTrox Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 89. ViTrox Main Business

Table 90. ViTrox Latest Developments

Table 91. Viscom Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 92. Viscom Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 93. Viscom Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 94. Viscom Main Business

Table 95. Viscom Latest Developments

Table 96. Nordson Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 97. Nordson Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 98. Nordson Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 99. Nordson Main Business

Table 100. Nordson Latest Developments

Table 101. Omron Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 102. Omron Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 103. Omron Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 104. Omron Main Business

Table 105. Omron Latest Developments

Table 106. Unicomp Technology Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 107. Unicomp Technology Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 108. Unicomp Technology Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 109. Unicomp Technology Main Business

Table 110. Unicomp Technology Latest Developments

Table 111. NIKON Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 112. NIKON Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 113. NIKON Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 114. NIKON Main Business

Table 115. NIKON Latest Developments

Table 116. Waygate Technologies (Baker Hughes) Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 117. Waygate Technologies (Baker Hughes) Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 118. Waygate Technologies (Baker Hughes) Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 119. Waygate Technologies (Baker Hughes) Main Business

Table 120. Waygate Technologies (Baker Hughes) Latest Developments

Table 121. Comet Yxlon Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 122. Comet Yxlon Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 123. Comet Yxlon Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 124. Comet Yxlon Main Business

Table 125. Comet Yxlon Latest Developments

Table 126. Test Research Inc. (TRI) Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 127. Test Research Inc. (TRI) Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 128. Test Research Inc. (TRI) Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

- Table 129. Test Research Inc. (TRI) Main Business
- Table 130. Test Research Inc. (TRI) Latest Developments
- Table 131. Seamark ZM Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 132. Seamark ZM Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
- Table 133. Seamark ZM Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 134. Seamark ZM Main Business
- Table 135. Seamark ZM Latest Developments
- Table 136. Zhengye Technology Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 137. Zhengye Technology Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
- Table 138. Zhengye Technology Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 139. Zhengye Technology Main Business
- Table 140. Zhengye Technology Latest Developments
- Table 141. ZEISS Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 142. ZEISS Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
- Table 143. ZEISS Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 144. ZEISS Main Business
- Table 145. ZEISS Latest Developments
- Table 146. Saki Corporation Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 147. Saki Corporation Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
- Table 148. Saki Corporation Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
- Table 149. Saki Corporation Main Business
- Table 150. Saki Corporation Latest Developments
- Table 151. XAVIS Co., Ltd. Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors
- Table 152. XAVIS Co., Ltd. Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications
- Table 153. XAVIS Co., Ltd. Electronic Manufacturing X-ray Inspection Equipment Sales

(Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 154. XAVIS Co., Ltd. Main Business

Table 155. XAVIS Co., Ltd. Latest Developments

Table 156. SEC Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 157. SEC Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 158. SEC Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 159. SEC Main Business

Table 160. SEC Latest Developments

Table 161. Techvalley Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 162. Techvalley Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 163. Techvalley Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 164. Techvalley Main Business

Table 165. Techvalley Latest Developments

Table 166. Goepel Electronic Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 167. Goepel Electronic Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 168. Goepel Electronic Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 169. Goepel Electronic Main Business

Table 170. Goepel Electronic Latest Developments

Table 171. Scienscope Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 172. Scienscope Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 173. Scienscope Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 174. Scienscope Main Business

Table 175. Scienscope Latest Developments

Table 176. SXRAY Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 177. SXRAY Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 178. SXRAY Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 179. SXRAY Main Business

Table 180. SXRAY Latest Developments

Table 181. Creative Electron Basic Information, Electronic Manufacturing X-ray Inspection Equipment Manufacturing Base, Sales Area and Its Competitors

Table 182. Creative Electron Electronic Manufacturing X-ray Inspection Equipment Product Portfolios and Specifications

Table 183. Creative Electron Electronic Manufacturing X-ray Inspection Equipment Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 184. Creative Electron Main Business

Table 185. Creative Electron Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Electronic Manufacturing X-ray Inspection Equipment

Figure 2. Electronic Manufacturing X-ray Inspection Equipment Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Electronic Manufacturing X-ray Inspection Equipment Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Electronic Manufacturing X-ray Inspection Equipment Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country/Region (2025)

Figure 10. Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Inline X-ray Inspection Equipment

Figure 12. Product Picture of Offline X-ray Inspection Equipment

Figure 13. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type in 2026

Figure 14. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of 2D X-ray Inspection Equipment

Figure 16. Product Picture of 3D X-ray Inspection Equipment

Figure 17. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Technology Type in 2026

Figure 18. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Technology Type (2021-2026)

Figure 19. Product Picture of Large-volume Production

Figure 20. Product Picture of Prototype and Small Quantities

Figure 21. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Production Line Type in 2026

Figure 22. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Production Line Type (2021-2026)

Figure 23. Electronic Manufacturing X-ray Inspection Equipment Consumed in PCB

Industry

Figure 24. Global Electronic Manufacturing X-ray Inspection Equipment Market: PCB Industry (2021-2026) & (Units)

Figure 25. Electronic Manufacturing X-ray Inspection Equipment Consumed in Integrated Circuits

Figure 26. Global Electronic Manufacturing X-ray Inspection Equipment Market: Integrated Circuits (2021-2026) & (Units)

Figure 27. Electronic Manufacturing X-ray Inspection Equipment Consumed in Others

Figure 28. Global Electronic Manufacturing X-ray Inspection Equipment Market: Others (2021-2026) & (Units)

Figure 29. Global Electronic Manufacturing X-ray Inspection Equipment Sale Market Share by Application (2025)

Figure 30. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Application in 2026

Figure 31. Electronic Manufacturing X-ray Inspection Equipment Sales by Company in 2026 (Units)

Figure 32. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Company in 2026

Figure 33. Electronic Manufacturing X-ray Inspection Equipment Revenue by Company in 2026 (\$ millions)

Figure 34. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Company in 2026

Figure 35. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Geographic Region (2021-2026)

Figure 36. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Geographic Region in 2026

Figure 37. Americas Electronic Manufacturing X-ray Inspection Equipment Sales 2021-2026 (Units)

Figure 38. Americas Electronic Manufacturing X-ray Inspection Equipment Revenue 2021-2026 (\$ millions)

Figure 39. APAC Electronic Manufacturing X-ray Inspection Equipment Sales 2021-2026 (Units)

Figure 40. APAC Electronic Manufacturing X-ray Inspection Equipment Revenue 2021-2026 (\$ millions)

Figure 41. Europe Electronic Manufacturing X-ray Inspection Equipment Sales 2021-2026 (Units)

Figure 42. Europe Electronic Manufacturing X-ray Inspection Equipment Revenue 2021-2026 (\$ millions)

Figure 43. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment

Sales 2021-2026 (Units)

Figure 44. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Revenue 2021-2026 (\$ millions)

Figure 45. Americas Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country in 2026

Figure 46. Americas Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Country (2021-2026)

Figure 47. Americas Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)

Figure 48. Americas Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Application (2021-2026)

Figure 49. United States Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 50. Canada Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 51. Mexico Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 52. Brazil Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 53. APAC Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Region in 2026

Figure 54. APAC Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Region (2021-2026)

Figure 55. APAC Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)

Figure 56. APAC Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Application (2021-2026)

Figure 57. China Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 58. Japan Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 59. South Korea Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 60. Southeast Asia Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 61. India Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 62. Australia Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 63. China Taiwan Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 64. Europe Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country in 2026

Figure 65. Europe Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share by Country (2021-2026)

Figure 66. Europe Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)

Figure 67. Europe Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Application (2021-2026)

Figure 68. Germany Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 69. France Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 70. UK Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 71. Italy Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 72. Russia Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 73. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Country (2021-2026)

Figure 74. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Type (2021-2026)

Figure 75. Middle East & Africa Electronic Manufacturing X-ray Inspection Equipment Sales Market Share by Application (2021-2026)

Figure 76. Egypt Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 77. South Africa Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 78. Israel Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 79. Turkey Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 80. GCC Countries Electronic Manufacturing X-ray Inspection Equipment Revenue Growth 2021-2026 (\$ millions)

Figure 81. Manufacturing Cost Structure Analysis of Electronic Manufacturing X-ray Inspection Equipment in 2026

Figure 82. Manufacturing Process Analysis of Electronic Manufacturing X-ray Inspection

Equipment

Figure 83. Industry Chain Structure of Electronic Manufacturing X-ray Inspection

Equipment

Figure 84. Channels of Distribution

Figure 85. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Forecast by Region (2027-2032)

Figure 86. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share Forecast by Region (2027-2032)

Figure 87. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share Forecast by Type (2027-2032)

Figure 88. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share Forecast by Type (2027-2032)

Figure 89. Global Electronic Manufacturing X-ray Inspection Equipment Sales Market Share Forecast by Application (2027-2032)

Figure 90. Global Electronic Manufacturing X-ray Inspection Equipment Revenue Market Share Forecast by Application (2027-2032)

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