

Global PCB / PCBA Automated Optical Inspection Systems Market Growth 2026-2032

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Abstracts

The global PCB / PCBA Automated Optical Inspection Systems market size is predicted to grow from US\$ 1350 million in 2025 to US\$ 2251 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

PCB / PCBA Automated Optical Inspection Systems are dedicated machine-vision inspection platforms used across printed circuit board fabrication, flexible and high-density interconnect board manufacturing, substrate-like board inspection, and printed circuit board assembly processes. A typical system integrates high-resolution 2D/3D imaging, multi-angle illumination, structured-light or laser-based metrology, precision motion control, defect-recognition algorithms, process-control software, traceability modules, and line-level communication interfaces. These systems automatically inspect and classify visible quality defects such as open and short circuits, scratches, contamination, solder mask defects, missing or misplaced components, polarity errors, insufficient solder, solder bridges, tombstoning, lifted leads, THT solder defects, conformal coating defects, and final cosmetic defects. This study focuses on AOI/AVI equipment, dedicated inspection software, and key optical metrology modules used for bare PCB, FPC/HDI, substrate-like board, and PCBA manufacturing applications.

Based on our research, the PCB / PCBA AOI systems market should be understood as a dedicated process-control equipment segment rather than a generic machine-vision market. The core value of these systems lies in defect libraries, application-specific optics, illumination design, 3D metrology, motion-control stability, false-call reduction, process traceability, and integration with electronics manufacturing data standards. For this reason, the study scope focuses on AOI/AVI equipment and dedicated inspection software used in bare PCB, FPC/HDI, substrate-like board, SMT, THT, and final PCBA inspection. Standalone SPI, AXI, ICT, flying-probe testing, and generic machine-vision

components are treated as adjacent categories rather than part of the revenue model. This narrower definition better reflects purchasing behavior and avoids overstating the market by mixing unrelated inspection technologies.

From a demand perspective, growth is driven by three structural forces. First, automotive electronics, AI servers, industrial control, power electronics, communications equipment, and medical electronics are pushing PCBAs toward higher density, higher reliability, and more stringent quality traceability. Second, advanced PCB, FPC, HDI, and substrate-like manufacturing require more precise defect detection for fine lines, microvias, warpage, foreign materials, and cosmetic defects, increasing the value of high-end AVI/AOI systems. Third, electronics manufacturers are using AOI data as a process-control input rather than a simple pass/fail checkpoint. As a result, the competitive frontier is moving from hardware-only inspection speed toward AI-assisted programming, low false-call rates, cross-machine data analytics, and closed-loop process optimization.

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

This Insight Report provides a comprehensive analysis of the global PCB / PCBA Automated Optical Inspection Systems 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 PCB / PCBA Automated Optical Inspection Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global PCB / PCBA Automated Optical Inspection Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PCB / PCBA Automated Optical Inspection Systems 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 PCB / PCBA Automated Optical Inspection Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of PCB / PCBA Automated Optical Inspection Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

2D AOI System

3D AOI System

Other Customized AOI Systems

Segmentation by Technology Route:

2D Image Processing

3D Structured Light

Hybrid 2D + 3D Inspection

Other

Segmentation by Process Step:

Bare Board Final Inspection

Pre-reflow AOI

Post-reflow AOI

Other

Segmentation by Application:

Incoming / Pre-process Inspection

In-process Quality Inspection

Final Quality Inspection

Other

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.

KLA Corporation

OMRON Corporation

Nordson Corporation

Yamaha Motor Co., Ltd.

Mycronic AB

Koh Young Technology Inc.

ViTrox Corporation Berhad

Test Research, Inc.

Viscom SE

CIMS

MIRTEC Co., Ltd.

SAKI Corporation

Machvision Inc.

Utechzone Co., Ltd.

JUTZE Intelligence Technology Co., Ltd.

Sinictek Intelligent Technology Co., Ltd.

FAVITE Inc.

PEMTRON Corporation

PARMI Co., Ltd.

Marantz Electronics Ltd.

G?PEL electronic GmbH

Magic-ray Technology

Zhenhuaxing Intelligent Technology Co., Ltd.

Machine Vision Products, Inc.

Delvitech SA

ASC International

Shenzhen HTGD Intelligent Equipment Co., Ltd.

ALeader Vision Technology

AOI Systems Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global PCB / PCBA Automated Optical Inspection Systems market?

What factors are driving PCB / PCBA Automated Optical Inspection Systems market growth, globally and by region?

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

How do PCB / PCBA Automated Optical Inspection Systems market opportunities vary by end market size?

How does PCB / PCBA Automated Optical Inspection Systems break out by Type, by Application?

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Figure 78. Italy PCB / PCBA Automated Optical Inspection Systems Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia PCB / PCBA A

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