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Global Power Module X-Ray Void Inspection Equipment Market Growth 2026-2032

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Abstracts

The global Power Module X-Ray Void Inspection Equipment market size is predicted to grow from US$ 280 million in 2025 to US$ 515 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

Power Module X-Ray Void Inspection Equipment refers to specialized non-destructive inspection systems used to identify, measure and classify internal voids and other hidden joining defects in IGBT, SiC and other power semiconductor modules. The equipment uses microfocus or high-resolution X-ray imaging combined with flat-panel detection, precision motion control, image-processing software and defect-analysis algorithms to inspect die-attach layers, DBC/AMB substrate interfaces, substrate-to-baseplate solder joints and other thermally or electrically critical internal connections. Commercial product configurations mainly include offline X-ray inspection systems, at-line inspection systems and inline automated X-ray inspection (AXI) platforms, while imaging architectures range from 2D and oblique 2.5D X-ray to planar CT/computed laminography and full 3D CT. Advanced systems are designed to address overlapping solder layers, thick copper structures, baseplates, heat sinks and other high-absorption structures through higher penetration capability, multi-angle acquisition, layer separation, shadow suppression and automated void-ratio analysis. The market primarily serves power-module manufacturing and quality control for automotive electrification, industrial drives, renewable-energy conversion, energy storage, rail traction, data-center power systems and other high-reliability power-electronics applications.

Key Findings

China and Japan together account for 13 of the 20 confirmed core manufacturers

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Inline 3D AXI, planar CT and full 3D CT represent the principal high-value technology routes

Global electric-car sales exceeded 20 million units in 2025, supporting power-module inspection demand

Market Trends

Power Module X-Ray Void Inspection Equipment is moving from conventional 2D defect visualization toward layer-resolved, quantitative and increasingly inline quality control. The change is driven by multilayer solder structures, thicker copper paths, baseplates, heat sinks and more compact high-power packaging, which make projected 2D images increasingly difficult to interpret. Leading equipment platforms now use planar CT, computed laminography or 3D CT to separate individual solder interfaces and calculate void area more accurately, while higher-power X-ray configurations improve penetration through thermally optimized module structures. Inline systems are also incorporating AI-assisted void recognition, automated recipe generation, MES connectivity and statistical process-control functions. Current commercial systems from established suppliers already demonstrate multilayer IGBT void separation, integrated CT, heat-sink shadow removal and AI-based void detection, indicating that the competitive focus is shifting from image acquisition alone toward inspection accuracy, cycle time and production-data integration.

Market Dynamics

Drivers

The primary market drivers are the expansion of power-semiconductor module production, increasing electrification of transportation and industrial systems, higher power density, and stricter reliability requirements for thermal and electrical interfaces. EV traction inverters, renewable-energy converters, industrial drives and other high-power systems require increasingly consistent die-attach and substrate-bonding quality, making internal void control an important manufacturing parameter. The transition toward SiC also raises inspection requirements because higher operating temperatures, switching frequencies and module values increase the cost of latent packaging defects. Continued industrialization of 200 mm SiC manufacturing further supports investment across power-semiconductor packaging, assembly and inspection processes.

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Restraints

Market development is constrained by relatively high equipment investment, especially for high-power inline CT and high-resolution 3D systems, and by the trade-off between imaging quality and production cycle time. Thick copper, metal baseplates and complex cooling structures can require higher X-ray penetration and more sophisticated reconstruction, increasing hardware and computing costs. Equipment qualification is also relatively demanding in automotive and other high-reliability applications because users require stable void measurement, low false-call rates and consistent results across multiple production lines. Smaller power-module manufacturers may therefore continue to use offline or sampling-based inspection where full inline CT economics are not yet justified.

Opportunities

The strongest opportunities are associated with migration from sampling inspection to higher inspection coverage, expansion of SiC power modules and adoption of more complex module architectures. Planar CT and fast 3D AXI have the potential to penetrate production lines where conventional 2D inspection cannot reliably separate multiple joining layers. Further opportunity exists in AI-assisted programming, automatic defect segmentation, recipe transfer between production lines and closed-loop integration with upstream soldering or joining processes. Chinese equipment manufacturers also have room to expand through localized service, shorter delivery cycles and lower system costs, while established international suppliers can capture premium demand in high-throughput automotive and advanced power-semiconductor lines.

Challenges

The key long-term challenge is maintaining inspection accuracy and repeatability as power-module architectures become increasingly diverse. Different substrate materials, solder or sintering processes, heat-sink structures and module thicknesses can generate substantially different X-ray absorption and defect signatures, limiting the effectiveness of one standardized inspection recipe. Faster CT reconstruction must also be achieved without sacrificing defect sensitivity, while AI-based classification requires stable training data and ongoing validation to avoid unacceptable false rejects or escapes. Complementary technologies such as acoustic microscopy may address certain delamination and interface defects, creating a need for X-ray systems to demonstrate clear advantages in quantitative void analysis, production speed and factory integration.

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Industry Chain Analysis

The upstream industry chain for Power Module X-Ray Void Inspection Equipment consists primarily of microfocus X-ray tubes and high-voltage power supplies, flat-panel detectors, precision motion-control components, industrial computers and GPU computing platforms, radiation-protection structures, mechanical automation components and image-processing software foundations. X-ray sources and detectors are among the most technically critical hardware inputs because penetration capability, focal-spot characteristics, dynamic range and acquisition speed directly affect final inspection performance. Motion accuracy and system rigidity become increasingly important for planar CT and 3D reconstruction, while computing hardware requirements rise as inspection moves toward higher-resolution volumetric imaging.

Midstream equipment manufacturers create value through system integration, radiation and motion engineering, CT reconstruction, void-recognition algorithms, automation design, application libraries and production-line connectivity. Software, application know-how and calibration capability increasingly differentiate suppliers because similar hardware configurations can produce materially different inspection results under complex multilayer structures. Downstream users are power-semiconductor module manufacturers and associated power-electronics production operations, where equipment is deployed in process-development laboratories, sampling quality-control stations or fully automated production lines. As the market shifts toward inline inspection, value creation increasingly depends on combining imaging performance with throughput, low false-call rates, traceability and MES/SPC integration rather than on X-ray hardware alone.

Segment Insights

By product type, the market can be divided into offline X-ray inspection systems, at-line inspection systems and inline AXI systems. Offline equipment remains important for engineering analysis, process development and lower-volume production because of its flexibility and relatively lower automation cost, while inline AXI represents the premium direction for large-scale manufacturing that requires traceability and high inspection coverage. By imaging technology, 2D systems retain cost and speed advantages for relatively simple structures, whereas oblique 2.5D imaging improves separation of overlapping features. Planar CT/computed laminography and full 3D CT create greater value in multilayer power modules because they can isolate specific bonding interfaces and reduce interference from heat sinks and metal structures.

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By power-module type, IGBT modules continue to represent a broad installed application base, while SiC power modules are becoming an increasingly important technology opportunity because of rapid adoption in high-voltage and high-efficiency power conversion. In terms of inspection objective, production-line systems are gradually moving from visual confirmation of gross defects toward quantitative void-area calculation, layer-specific defect classification and automated pass/fail decision making. The highest-value product opportunities are therefore concentrated in systems capable of combining high penetration, layer separation, automated void analysis and production-compatible throughput.

Downstream Market Opportunities

Automotive and new-energy vehicles represent the most important downstream opportunity because traction inverters combine high module volumes with demanding reliability requirements, while SiC adoption increases the value of advanced inspection. Industrial automation and motor drives provide a comparatively stable demand base, and renewable-energy and energy-storage systems offer additional growth through higher-power inverter and PCS deployment. Rail transportation, data-center power supplies, telecom power and UPS systems represent smaller but technically attractive markets because equipment reliability and thermal performance remain critical. Global electric-car sales exceeded 20 million units in 2025, with electric vehicles accounting for roughly one-quarter of new car sales, reinforcing the long-term demand foundation for power-semiconductor modules and associated production inspection.

Regional Insights

From the supply side, China and Japan form the densest manufacturing clusters in the confirmed core supplier pool, together accounting for 13 of the 20 manufacturers identified in this study. Japan has a particularly strong concentration of specialized X-ray and power-device inspection expertise, while China has the broadest group of newer domestic equipment manufacturers and is rapidly expanding from conventional offline X-ray toward inline AXI, planar CT and 3D inspection. Germany and Switzerland represent the principal European high-end X-ray and CT equipment cluster, while Taiwan, Malaysia and South Korea contribute specialized automated-inspection suppliers. North America has fewer confirmed core manufacturers but retains important high-end electronics and industrial X-ray capabilities.

On the demand side, China offers particularly strong market potential because it combines large-scale power-electronics manufacturing, domestic SiC investment and

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the world’s largest electric-vehicle market. China accounted for around six out of ten electric cars sold globally in 2025, providing a large downstream manufacturing base for traction inverters and related power modules. Europe remains important for automotive electrification and high-reliability industrial applications, while Japan maintains strong demand from automotive, industrial-drive and power-semiconductor manufacturing. Southeast Asia is developing as an additional electronics and semiconductor manufacturing base, creating opportunities for regional equipment deployment and service networks.

Competitive Landscape Analysis

The competitive landscape of Power Module X-Ray Void Inspection Equipment is characterized by a relatively limited group of specialized manufacturers rather than a broad pool of general industrial X-ray suppliers. The confirmed Core Formal List contains 20 manufacturers after parent-company consolidation, with competition differentiated by product specialization, CT capability, installed production experience, application software and regional service. Established international suppliers such as SAKI, Viscom, Nordson, OMRON, TRI and ViTrox compete primarily through advanced inline AXI, multilayer inspection, CT reconstruction, automated defect analysis and global manufacturing support, while Comet, ZEISS and Shimadzu provide strong high-end X-ray and CT capabilities for more complex or analytical inspection requirements. Chinese manufacturers including Unicomp, Seamark ZM, Magic-ray and AiShield are strengthening competition through localized engineering, faster customization and increasingly capable 3D/planar CT platforms. The market does not currently support a reliable public market-share ranking at this narrow product level, and competitive position is therefore better assessed through power-module-specific product capability, customer validation, inspection throughput, void-analysis performance and service coverage. As technology advances, competitive differentiation is expected to move further toward high-power penetration, accurate solder-layer separation, AI-assisted inspection and lower total cost of ownership rather than basic X-ray imaging capability alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Power Module X-Ray Void Inspection Equipment Industry Forecast” looks at past sales and reviews total world Power Module X-Ray Void Inspection Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Power Module X-Ray Void Inspection Equipment sales for 2026 through 2032. With Power Module X-Ray

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Void Inspection Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Power Module X-Ray Void Inspection Equipment industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Power Module X-Ray Void 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 Power Module X-Ray Void Inspection Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Power Module X-Ray Void Inspection Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Offline X-ray Inspection System

At-line X-ray Inspection System

Inline AXI System

Segmentation by Imaging Technology:

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2D X-ray

2.5D / Oblique X-ray

Full 3D CT

Segmentation by Power Module Type:

IGBT Power Module

SiC Power Module

Other Power Module

Segmentation by Inspection Objective:

Failure Analysis & R&D

Process Quality Inspection

100% Production Inspection

Segmentation by Application:

Industrial Automation & Motor Drives

Renewable Energy & Energy Storage

Rail Transportation

Data Center, Telecom & UPS

Aerospace, Defense & Other High-reliability Applications

Other Applications

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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

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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.

Shin-Etsu Chemical Co., Ltd.

OMRON Corporation

Nordson Corporation

Carl Zeiss AG

Shimadzu Corporation

Comet Holding AG

ViTrox Corporation Berhad

Test Research, Inc.

Unicomp Technology Co., Ltd.

Viscom SE

SAKI Corporation

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Matsusada Precision Inc.

SEC Co., Ltd.

I-BIT Co., Ltd.

Seamark ZM Technology Co., Ltd.

Shenzhen Magic-ray Technology Co., Ltd.

Wuxi AiShield Technology Co., Ltd.

Ruimao Guangxue (Shenzhen) Youxian Gongsi

Shenzhen Shi Huafei Keji Youxian Gongsi

Ruiying Jiance Keji (Jinan) Youxian Gongsi

Key Questions Addressed in this Report

What is the 10-year outlook for the global Power Module X-Ray Void Inspection Equipment market?

What factors are driving Power Module X-Ray Void Inspection Equipment market growth, globally and by region?

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

How do Power Module X-Ray Void Inspection Equipment market opportunities vary by end market size?

How does Power Module X-Ray Void Inspection Equipment break out by Type, by Application?

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