

# Global SPI Equipment for Electronics Manufacturing Market Growth 2026-2032

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## Abstracts

The global SPI Equipment for Electronics Manufacturing market size is predicted to grow from US\$ 312 million in 2025 to US\$ 474 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 2032.

SPI Equipment for Electronics Manufacturing refers to dedicated automated inspection and metrology systems installed after solder paste printing and before component placement in SMT production lines, primarily used to evaluate solder paste volume, height, area, positional offset, insufficient paste, excessive paste, bridging, edge collapse, peaking, and other printing abnormalities on PCB surfaces. The market is currently dominated by inline 3D SPI systems, while product development continues to move toward higher resolution, faster dual-lane throughput, closed-loop process control, and smart factory connectivity. Key upstream inputs include industrial cameras, image sensors, telecentric lenses, structured-light projection modules, laser measurement units, precision motion-control platforms, linear motors, guide rails and ball screws, industrial computers, control boards, machine frames, and inspection algorithm software. Major downstream customers include EMS providers, PCB assembly manufacturers, consumer electronics producers, automotive electronics companies, communication equipment makers, industrial and medical electronics manufacturers, as well as Mini-LED and other high-density electronics assembly firms. On an ex-factory basis, global effective production capacity in 2025 is estimated at approximately 8,240 units, with actual shipments of about 6,924 units and an average ex-factory selling price of around USD 46,000 per unit. The industry gross margin is generally assessed at 45%-58%, with standard inline SPI systems positioned in the middle of the range, while high-resolution, high-speed dual-lane, and customized systems for high-reliability electronics manufacturing typically achieve higher margins.

The market for SPI Equipment for Electronics Manufacturing has entered a sustained upgrade phase dominated by three-dimensional inspection, with demand increasingly shifting from basic defect screening toward process control and yield improvement. As electronic products continue to move toward miniaturization, higher density, and greater functional integration, solder paste printing quality has become more influential in downstream placement, reflow soldering, and final product reliability. Manufacturers are paying closer attention to the stable control of solder paste volume, height, area, and positional offset. In medium- and high-end production lines, SPI has become an increasingly important process checkpoint, and competition is moving beyond the ability to identify insufficient paste, excessive paste, and bridging toward inspection accuracy, false-call suppression, adaptability to complex boards, and long-term operating stability.

From the demand side, consumer electronics remains an important base market, while automotive electronics, servers and high-performance computing hardware, communication equipment, industrial control systems, and high-reliability electronics are becoming the main drivers of higher-end demand. Automotive electronics and power-control modules require stronger soldering reliability, process consistency, and quality traceability, encouraging the adoption of systems with high repeatability, warpage compensation, and stable analytical performance. High-density PCBs, miniature solder paste deposits, and more complex packaging structures are also raising the need for higher resolution and finer measurement capability. At the same time, electronics manufacturers are placing greater emphasis on line efficiency and data coordination, gradually transforming SPI from a standalone inspection unit into a key data node within SMT production lines.

Looking ahead, SPI equipment will continue to evolve toward higher precision, faster throughput, intelligent analysis, and closed-loop process control. Three-dimensional inspection has already become the mainstream direction, while hybrid 2D and 3D measurement, dynamic image-resolution switching, adaptability to complex surfaces, automated programming, and intelligent defect classification will remain important areas of product iteration. More importantly, SPI systems are becoming more closely connected with solder paste printers, placement machines, MES, and SPC platforms. Through machine-to-machine communication, process trend analysis, and parameter feedback, electronics manufacturing is gradually shifting from post-process judgment toward early warning and process optimization. Vendors with stronger AI-assisted analysis, intelligent review, and closed-loop control capabilities are likely to gain greater advantages in premium EMS, automotive electronics, and high-reliability manufacturing.

The industry still faces several constraints. SPI equipment requires deep integration of optical imaging, three-dimensional reconstruction, motion control, software algorithms, and process databases, creating relatively high development barriers and making it difficult for smaller vendors to enter premium segments. In addition, customer requirements vary significantly in PCB structures, solder paste characteristics, production takt time, and acceptance criteria, making equipment deployment, parameter tuning, and field engineering support important factors in purchase decisions. The electronics manufacturing industry also follows visible capital-expenditure cycles, and when end-market demand weakens, expansion slows, or replacement plans are postponed, SPI equipment purchases may also be delayed. Overall, the market retains solid medium- to long-term growth potential, but market share is likely to become more concentrated among suppliers with more complete technology platforms, stronger software capabilities, and more mature service systems.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for SPI Equipment for Electronics Manufacturing 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 SPI Equipment for Electronics Manufacturing.

This report presents a comprehensive overview, market shares, and growth opportunities of SPI Equipment for Electronics Manufacturing market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

2D SPI Equipment

3D SPI Equipment

Other

#### Segmentation by Inspection Technology:

Benchtop Testers

Inline SPI Systems

Other

#### Segmentation by Tested PCB Type:

Standard SMT PCB

Fine-pitch / High-density PCB

Other

#### Segmentation by Application:

Consumer Electronics

Automotive Electronics

Industrial and Medical Electronics

Communication Equipment

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.

Koh Young Technology

Nordson

Test Research

ViTrox

MIRTEC

PARMI

PEMTRON

SAKI Corporation

Yamaha Motor

OMRON

Viscom

Mycronic

JUTZE Intelligence Technology

Xiamen Sinictek Intelligent Technology

Magic-ray Technology

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global SPI Equipment for Electronics Manufacturing market?

What factors are driving SPI Equipment for Electronics Manufacturing market growth, globally and by region?

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

How do SPI Equipment for Electronics Manufacturing market opportunities vary by end market size?

How does SPI Equipment for Electronics Manufacturing break out by Type, by Application?

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