

# Solder Paste Inspection (SPI) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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## Abstracts

Solder Paste Inspection (SPI) is a critical quality control technology employed in Surface Mount Technology (SMT) manufacturing processes. SPI machines utilize advanced optical systems, predominantly 3D techniques, to rapidly measure and inspect the deposited solder paste on Printed Circuit Boards (PCBs) immediately after the stencil printing stage, but before component placement (Pick and Place).

The core function of SPI is to verify the three-dimensional integrity of every solder deposit, specifically measuring: Area, Height, and Volume. By addressing solder paste print quality—which is responsible for an estimated 60%-70% of total SMT production defects—SPI acts as the primary source quality gate, minimizing later-stage soldering defects like shorts, opens, and component misalignment.

The SPI industry is defined by the following characteristics:

**Source Quality Gate:** SPI is essential for improving the initial quality of the SMT process, targeting the most critical defect source (solder paste printing), thereby improving overall yield and productivity.

**3D Volumetric Requirement:** The market is dominated by 3D inspection technology, as volumetric data (height and volume) is necessary to ensure reliable solder joints for smaller, thinner components, preventing issues like insufficient/excessive solder or short circuits.

**High-Speed Integration:** SPI systems must be highly integrated into the production line, offering rapid, non-contact measurement and immediate feedback for process correction.

**Technology Evolution Towards AI:** The market is increasingly adopting AI and Deep Learning to enhance the accuracy of defect detection and reduce false calls, moving beyond reliance on fixed, rule-based algorithms.

The global Solder Paste Inspection (SPI) market is estimated to be valued in the range of 0.8-1.5 billion USD in 2025. This valuation reflects its standing as an indispensable, high-value capital equipment segment within the broader electronics manufacturing sector. Driven by the unrelenting miniaturization of components, the demand for high-reliability PCBs, and the necessary adoption of 3D technology, the market is projected to achieve a Compound Annual Growth Rate (CAGR) in the range of 3.6%-6.6% through 2030.

### Segmentation by Inspection Type and Technological Evolution

The market for SPI is primarily segmented by its operational placement in the SMT line and is defined by the ongoing adoption of AI.

#### On-Line SPI:

**Characteristics:** Systems integrated directly after the solder paste printer to inspect every PCB in real-time. This provides immediate process feedback, allowing operators to make instant adjustments to the printer (closed-loop control) and maintain the highest quality standards.

**Trend:** On-Line SPI is the dominant and fastest-growing segment, considered essential for all modern, high-volume SMT production lines due to its direct impact on process control and yield.

#### Off-Line SPI:

**Characteristics:** Systems used for sampling, verification, or analyzing the printer's performance during setup and maintenance. These are typically used in lower-volume or highly customized production environments.

**Trend:** While On-Line systems dominate volume, Off-Line SPI remains a valuable tool for process engineering, providing detailed analysis capabilities.

### Technological Development: AI and Deep Learning

**Features:** Traditional rule-based machine vision is based on fixed algorithms and struggles to adapt to complex, evolving component requirements, leading to false calls. Introducing AI Deep Learning (CNN) enables the system to automatically extract image features, classify defects, and significantly boost the reliability and efficiency of inspection.

**Trend:** The shift to AI-powered SPI is a key market trend, allowing manufacturers to effectively deal with high-density, small-pitch components and reducing the dependence on manual tuning of inspection recipes.

### Application Segments and Inspection Focus

SPI is focused almost entirely on the production of Printed Circuit Boards (PCB), ensuring the quality of the initial process step.

#### Printed Circuit Board (PCB):

**Characteristics:** SPI is deployed before the Pick and Place machine to verify that the solder paste is printed correctly. This prevents defects like Insufficient Solder (leading to open circuits or weak joints), Excessive Solder (leading to bridging/shorts), and Solder Bridge (short circuits). It also checks for the BGA pad size and placement quality.

**Inspection Focus:** The machine quickly measures the thickness, area, and volume of every single solder deposit, ensuring that thin, short, or wide deposits—which could cause poor contact, shorts, or misalignment—are prevented. Its use drastically reduces the process failure rate of components like BGA.

**Trend:** The continued miniaturization of electronic products (thin, light,

small form factors) necessitates higher reliability and finer pitch printing, making 3D SPI an absolute requirement, not an option, for modern PCB assembly.

### Overview of Key Market Players

The SPI market is dominated by a few global technology leaders and a growing cohort of highly competitive Asian manufacturers.

#### Global Technology Leaders (Specialists in 3D):

**Koh Young Technology Inc.:** A dominant Korean specialist, widely recognized as a global leader in high-accuracy 3D SPI and 3D AOI solutions, commanding a large share in the high-end market.

**Saki Corporation:** A Japanese firm known for its high-speed and high-accuracy 3D inspection solutions, often integrated into complex SMT lines.

**Omron:** A Japanese industrial automation leader providing comprehensive SMT inspection tools, including high-speed SPI.

**Viscom SE:** A prominent European manufacturer focusing on high-end 3D inspection systems, including SPI, often favored in high-reliability segments.

**Nordson Test & Inspection:** A global supplier offering a diverse portfolio of electronics test equipment, including SPI.

#### Key APAC Players (Broad Portfolio and Growing Scale):

**ViTrox:** A major Malaysian technology company providing automated vision inspection equipment for the SMT industry, with a strong presence in SPI.

**Test Research Inc (TRI):** A major manufacturer offering a wide range of test and inspection solutions, including SPI.

MIRTEC Co. Ltd. and PARMi Co. Ltd.: Korean inspection specialists with strong regional and growing global presence in SMT quality control.

Marantz Electronics Ltd: A Japanese company providing advanced inspection solutions for electronics assembly.

#### Chinese Manufacturers (Rapid Expansion):

Shenzhen JT Automation Equipment Co. Ltd., Jutze Intelligence Technology Co. Ltd., Xiamen Sinictek Intelligent Technology Co. Ltd., ALeader Vision Technology Ltd., Zhenhuaxing Intelligent (Shenzhen) Technology Co. LTD: This group represents the strong and rapidly growing Chinese manufacturing base, supplying competitive SPI solutions primarily to the massive domestic and regional electronics manufacturing sectors.

#### Value Chain Analysis

The SPI value chain is heavily concentrated on the integration of high-precision optical hardware and proprietary software for volumetric measurement.

#### Stage 1: Upstream Component Sourcing (High-Precision Hardware)

**Key Process:** Procurement of specialized high-resolution cameras (CMOS sensors), advanced optics, structured light sources (laser/LED projection), high-speed processing units, and precise motion control systems.

**Players:** Global sensor manufacturers, specialized optics firms, and industrial automation component suppliers.

#### Stage 2: Core Technology Development (3D Algorithms and AI Software)

**Key Process:** The highest value-add step: developing proprietary 3D reconstruction algorithms (e.g., using phase-shifting or triangulation) to accurately measure height and volume, and integrating AI/Deep Learning (CNN) for automated defect classification and false call reduction.

Players: Koh Young, Saki, Viscom, leveraging their extensive R&D into measurement physics and software engineering.

Value Addition: Sub-micron measurement accuracy, high throughput speed, and the intelligence of the AI software.

### Stage 3: System Integration and Assembly

Key Process: Assembling the hardware components into a robust, high-speed, On-Line compatible industrial machine and integrating it with other SMT equipment (printers and pick-and-place machines).

Players: All key SPI system manufacturers (Omron, Nordson, TRI).

### Stage 4: Downstream Deployment and Process Service

Key Process: Installation, calibration, linking the SPI unit to the solder paste printer for closed-loop control, and providing continuous process engineering support.

Players: SPI vendors working closely with EMS providers and original equipment manufacturers (OEMs) in the electronics assembly industry.

## Regional Market Trends

The SPI market perfectly aligns with global SMT production centers.

### Asia-Pacific (APAC)

Global Primary Market: APAC is the largest market, dominating both the consumption and production of SPI equipment due to the massive scale of electronics manufacturing in China, South Korea, Japan, and Taiwan China.

Key Trend: Supply chain reconfiguration, driven by geopolitical factors, is positioning Southeast Asia and India as major future growth drivers. These regions are attracting new SMT investment that requires SPI for

yield control.

Estimated CAGR: In the range of 4.5%-7.5% through 2030, driven by aggressive capacity expansion and technology upgrades across the region.

## North America

Second Largest Market: Demand is stable and growing, driven by advanced electronics manufacturing for aerospace, defense, and high-performance computing.

Key Trend: The 'friend-shoring' of electronics assembly, including significant investment in Mexico, is boosting the demand for high-quality SPI systems to support production destined for the US market.

Estimated CAGR: In the range of 3.0%-6.0% through 2030.

## Europe

Third Largest Market: Demand is focused on high-reliability SMT production, particularly in the automotive electronics sector. European suppliers often focus on specialized, high-precision solutions.

Key Trend: European policies supporting local electronics manufacturing and continued investment in high-end automotive and industrial PCB assembly maintain steady demand.

Estimated CAGR: In the range of 2.5%-5.5% through 2030.

## Latin America (LATAM) and MEA (Middle East & Africa)

Emerging Growth Regions: These regions, particularly LATAM due to automotive and electronics assembly near-shoring, are seeing increased investment in modern SMT lines, necessitating SPI adoption for quality control.

Estimated CAGR: In the range of 3.0%-6.0% through 2030, though growing from a smaller base.

## Opportunities and Challenges

SPI is benefiting from the complexity of modern electronics but faces significant market pressures.

### Opportunities

**Miniaturization and Finer Pitch:** The continual reduction in component size requires sub-micron level solder paste accuracy. This makes 3D SPI non-optional and drives demand for the highest precision systems, enhancing the value proposition for technology leaders.

**AI Integration for Process Optimization:** Integrating AI into SPI not only improves defect detection but allows for more sophisticated closed-loop feedback to the solder paste printer, leading to truly optimized and self-correcting SMT lines.

**High ROI Proposition:** Since solder paste print defects account for the majority of SMT failures, SPI provides a clear and high return on investment by significantly improving first-pass yield and reducing rework costs.

**Electromobility and 5G Drivers:** High-reliability sectors, particularly automotive electronics (for EVs) and advanced computing (for 5G infrastructure), demand the highest SMT quality, ensuring sustained high-end demand for SPI equipment.

### Challenges

**Price Competition:** The proliferation of capable and cost-competitive SPI manufacturers from China (such as Jutze, Sinictek, Zhenhuaxing) places significant downward pressure on the average selling price and margins for global competitors.

**Integration Complexity:** Successful SPI implementation requires complex integration and calibration with both the preceding solder paste printer and the subsequent Pick and Place machine, necessitating close collaboration and robust software interfaces.

**Technological Obsolescence:** The rapid evolution of SMT processes and components forces SPI manufacturers to continuously invest heavily in R&D to maintain measurement speed and accuracy, particularly in AI and optics.

**Market Cyclical:** As capital equipment, the SPI market is sensitive to the cyclical nature of capital expenditure in the global electronics manufacturing sector, which can lead to periods of unpredictable demand fluctuation.

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