

In-Circuit Tester Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Product (In-Line Tester and Multimode Flying Probe Tester), Portability (Non-Portable and Portable), Industry (Consumer Electronics, Automotive, Medical Equipment, Aerospace and Defense, and Others)

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Abstracts

The In-Circuit Tester Market size is expected to reach US\$ 1.40 billion by 2030 from 1.04 billion in 2022, at an estimated CAGR of 3.8% from 2022 to 2030.

The North America market is segmented into the US, Canada, and Mexico. The market in the region is booming in terms of technology and manufacturing. The North America manufacturing market has a strong focus on high-tech industries. The region also has several major automotive manufacturers, such as General Motors and Ford. As per the International Energy Agency, in the US, electric car sales boosted by 55% in 2022 compared to 2021, led by battery electric vehicles (BEVs). Sales of BEVs increased by 70%, reaching nearly 800,000 and confirming a second consecutive year of strong growth after the 2019–2020 dip. Products in in-circuit tester market are used in BEVs for several applications, including transmission or safety electronics and entertainment systems. Thus, the rise in the number of BEVs propels the demand for products in in-circuit tester market.

Various products in in-circuit tester market, including Keysight and Seica, operate in the market. For instance, Keysight provides Keysight's x1149 boundary scan analyzer, which is a powerful tool for structural tests, such as open and short tests on their printed circuit board assembly (PCBA). It also performs in-system programming for devices

such as field programmable gate arrays (FPGAs) and complex programmable logic devices (CPLDs) for testing interconnects between ICs, eliminating the need for physical probes. Thus, the rise in automotive manufacturing and the presence of providers in in-circuit tester market propel the growth of the in-circuit tester market in the region.

The US has one of the largest automotive markets in the world. As per the International Trade Administration (ITA), in 2020, US light vehicle sales were 14.5 million units. Overall, the US is the world's second-largest market for vehicle sales and production. Autos Drive America stated that international automakers manufactured 5 million vehicles in the US in 2020. In November 2023, Keysight Technologies, Inc. introduced the new Keysight i3070 Series 7i in-line test system, an automated in-circuit test system (ICT). This product increased capacity and throughput, enabling manufacturers to meet the complex test demands of larger node count economically printed circuit board assembly (PCBA). The increase in automotive manufacturing and product launches in the country fuels the growth of the in-circuit tester market.

Based on industry, the in-circuit tester market is segmented into consumer electronics, automotive, medical equipment, aerospace and defense, and others. Products in in-circuit tester market are essential tools in the manufacturing of consumer electronics, ensuring the quality and reliability of printed circuit boards (PCBs) used in a variety of devices, from smartphones and tablets to laptops and televisions. ICTs play a crucial role in identifying and eliminating defects in PCBs, preventing costly rework, and ensuring that products meet customer expectations. Moreover, ICTs can detect defects early in the manufacturing process, minimizing the cost of rework and scrap. This is particularly important for high-volume production, where even a small defect rate can have a significant impact on profitability. Additionally, they are used to test the motherboards and other PCBs in laptops and desktops, ensuring that these devices are reliable and free of defects. Products in in-circuit tester market is a device used to test printed circuit boards (PCBs) for manufacturing defects. In the automotive industry, products in in-circuit tester market are used to test PCBs for a variety of defects, such as open circuits, short circuits, missing components, incorrectly installed components, and solder defects. ICTs are an important part of the automotive manufacturing process because they help ensure the quality and reliability of electronic components. By detecting and eliminating manufacturing defects, ICTs can help prevent costly recalls and warranty claims. Therefore, ICTs are a valuable tool for the automotive industry as they can help improve the quality and reliability of electronic components, reduce production costs, and increase manufacturing throughput.

Based on product, the In-Circuit Tester market is segmented into multimode in-line tester and flying probe tester. In-line testers are used to test printed circuit boards (PCBs) that are already assembled and populated with components. These testers have several advantages, such as high throughput, high accuracy, and repeatability. In-line testers can test PCBs at a very high speed, which can help increase production efficiency. In-line testers are very accurate and can detect a wide variety of defects. Multimode flying probe testers can accommodate a wider range of board sizes, shapes, and component configurations without the need for fixture changes. This makes them ideal for testing low- and medium-volume production runs, as well as prototyping and product development. Multimode flying probe testers can achieve sub-micron positioning accuracy, which is required for testing complex boards with densely packed components. These testers can also perform a wide range of tests, including functional, shorts, opens, and continuity. Additionally, they are particularly well-suited for applications where flexibility, accuracy, and versatility are important. Owing to the above benefits, the market for this segment is growing.

Teradyne Inc.; Acculogic Inc.; Digitaltest GmbH; Hioki E.E. Corporation; Keysight Technologies; Konrad GmbH; Kyoritsu Test System Co., Ltd.; Seica S.p.A.; SPEA S.p.A.; and Test Research, Inc. are among the key in-circuit tester market players that are profiled in this market study.

The overall In-Circuit Tester Market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the In-Circuit Tester Market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the In-Circuit Tester Market.

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