

Structural Health Monitoring Market by Component (Hardware, Software, and Services), End User (Civil, Aerospace, Defense, Mining, Energy, and Others), and Connectivity (Wired and Wireless): Global Opportunity Analysis and Industry Forecast, 2020–2027

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Abstracts

The global structural health monitoring market was valued at \$1,674.0 million in 2019 and is projected to reach \$3,815.1 million by 2027, registering a CAGR of 14.5% from 2020 to 2027. Structural health monitoring (SHM) refers to collection and analysis of data derived through a wide array of connected sensors during the service life of a structure or equipment. It is a non-destructive and continuous data collection method of identifying and quantifying the deterioration state of the object to predict the necessity of repair and maintenance. The real-time data collection and analysis can help in making appropriate decisions to avoid occurrence of accidents and unprecedented failures in the structure. SHM can be applied in industries such as civil, aerospace, defense, energy, and others.

The aging infrastructure in developed countries including Japan, the U.S., the UK, and others, is expected to surge the demand for structural health monitoring solutions. For instance, according to '2021 Report Card for America's Infrastructure' published by the American Society of Civil Engineers (ASCE), 42% of the bridges in the U.S. are aged at least 50 years, whereas, around 7.5% of the country's bridges were considered as structurally deficient and are in a poor condition. Such structures require continuous assessment to predict the necessity of repairs and maintenance to avoid sudden failures, which may lead to accidents and fatalities. This is expected to create a demand for structural health monitoring, which in turn drives the growth of structural health monitoring market. Moreover, the effectiveness of SHM over the conventional methods of inspection and testing is also expected to propel the growth of the structural health

monitoring market.

Conventional methods such as visual inspection and non-destructive testing are periodical and do not offer real-time analysis of the structure's health and defects. Thus, structural health monitoring proves to be more effective and accurate, which drives the growth of the structural health monitoring market.

However, the high costs of installation, hardware, and operation of SHM is hindering its growth in the industry. In addition, lack of skilled personnel for data collection and processing and high costs of the devices hampers the growth of the structural health monitoring market.

The global structural health monitoring market is segmented on the basis of component, end user, connectivity, and region. Based on component, the structural health monitoring market is fragmented into hardware, software, and services. According to end user, the global structural health monitoring market is categorized into civil, aerospace, defense, mining, energy, and others. By connectivity, the market is classified into wired and wireless. Region wise, the structural health monitoring market has been analyzed across North America (the U.S., Canada, and Mexico), Europe (Germany, the UK, France, Italy, and rest of Europe), Asia-Pacific (China, Japan, India, and rest of Asia-Pacific), and LAMEA (Latin America, Middle East, and Africa).

COMPETITION ANALYSIS

The key players profiled in this report include National Instruments Corporation, Advitam Inc., Digitexx Data Systems, Inc. Acellent Technologies, Inc., Nova Metrix LLC, COWI A/S, Geocomp Corporation, Hottinger Baldwin Messtechnik GmbH, Straininstall UK Limited, and Kinemetrics Inc.

The key players in this market adopted product launch, partnership, and expansion as their key strategies to meet the change in consumer demands. For instance, Straininstall UK Limited launched a new load shackles to monitor solutions for Marine Energy's PLAT_I tidal energy project in the U.S. The project aimed to provide better understanding about the effect of extreme conditions for turbines.

KEY BENEFITS FOR STAKEHOLDERS

The report provides an extensive analysis of the current and emerging structural health monitoring market trends and dynamics.

In-depth market analysis is conducted by structural health monitoring market estimations for the key market segments between 2019 and 2027.

Extensive analysis of the market is conducted by following key product positioning and monitoring of the top competitors within the market framework.

A comprehensive analysis of all the regions is provided to determine the prevailing opportunities.

The global structural health monitoring market forecast analysis from 2020 to 2027 is included in the report.

The key market players within the structural health monitoring market are profiled in this report and their strategies are analyzed thoroughly, which help understand the competitive outlook of the market.

GLOBAL STRUCTURAL HEALTH MONITORING MARKET SEGMENTS

BY COMPONENT

Hardware

Software

Services

BY CONNECTIVITY

Wired

Wireless

BY END USER

Civil

Aerospace

Defense

Energy

Mining

Others

BY REGION

North America

U.S.

Canada

Mexico

Europe

Germany

The UK

France

Italy

Rest of Europe

Asia-Pacific

China

Japan

India

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

KEY PLAYERS

National Instruments Corporation

Advitam Inc.

Digitexx Data Systems, Inc.

Acellent Technologies, Inc.

Nova Metrix LLC

COWI A/S

Geocomp Corporation

Hottinger Baldwin Messtechnik GmbH

Strainstall UK Limited

Kinematics Inc.

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