

Global CNC Tool Presetting and Measuring Machine Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GA20225DAD0DEN.html>

Date: September 2026

Pages: 146

Price: US\$ 4,480.00 (Single User License)

ID: GA20225DAD0DEN

Abstracts

The global CNC Tool Presetting and Measuring Machine market size is expected to reach \$ 878 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

CNC Tool Presetting and Measuring Machine refers to precision equipment installed outside a CNC machine tool to hold complete cutting-tool assemblies and determine their geometric parameters before machining. The equipment typically integrates a dimensionally stable base and column, a precision spindle or interchangeable toolholder interface, X- and Z-axis measuring mechanisms, controlled illumination, CCD or CMOS imaging, image-processing software and tool-data output functions. Core measurements include tool length, diameter, radius, cutting-edge position, angle, profile and axial or radial runout. Product forms range from compact bench-top and vertical floor-standing models to horizontal turning-tool systems, CNC-controlled machines and robotic tool-preparation cells. Advanced configurations support automatic edge recognition, multi-flute measurement, cutting-edge inspection, profile comparison, RFID or code-based identification and direct transmission of offset data to CNC controls, CAM platforms or tool-management systems. The market focuses on independent offline equipment used in central tool rooms, machine-side preparation areas, flexible manufacturing cells and automated tool-logistics environments serving automotive, aerospace, mould and die, general machinery, energy, medical-device and other precision-machining applications.

Key Findings

In 2025, global CNC Tool Presetting and Measuring Machine production

reached approximately 13,866. The average price is approximately \$42,000.

Digital image processing systems represent the largest product revenue segment within the market

Europe remains the leading high-value market and the most concentrated manufacturing cluster

Core manufacturers contribute roughly three quarters of narrow-scope market revenue

Market Trends

The CNC Tool Presetting and Measuring Machine market is evolving from stand-alone geometric measurement toward connected and increasingly automated tool-preparation workflows. Digital image processing has become the mainstream technology for mid-range and premium equipment, while automatic focusing, edge recognition, multi-flute measurement and repeatable measuring cycles are reducing dependence on operator experience. Connectivity is also becoming a standard purchasing criterion as manufacturers seek reliable transfer of tool offsets to multiple CNC controls, CAM systems and tool-management platforms. At the upper end of the market, presetting is being combined with shrinking, assembly, cleaning, balancing and robotic handling to create integrated tool-preparation cells. Product development is therefore shifting from improvements in basic measuring accuracy toward software usability, controller compatibility, data integrity and automation scalability. Recent consolidation within the Swiss metrology and tool-presetting sector further indicates that manufacturers are strengthening broader measurement platforms rather than competing only through individual machine models.

Market Dynamics

Drivers

Demand is primarily driven by the need to increase the productive utilisation of high-value CNC machining assets. Measuring and presetting tools outside the machine reduces non-cutting setup time, limits manual offset-entry errors and supports more

consistent first-part quality. The benefits become more significant as manufacturers adopt five-axis machining centres, mill-turn systems, flexible manufacturing cells and high-mix production involving larger numbers of complex tools. Skilled-labour shortages also encourage investment in graphical interfaces, automatic measuring cycles and standardised tool-data workflows. Aerospace, automotive powertrain, mould and die, medical-device and precision-engineering manufacturers provide particularly strong demand because tool runout, cutting-edge geometry and traceable offsets have a direct effect on productivity, component quality and scrap levels.

Restraints

Market expansion is constrained by the relatively high initial investment required for premium optical, CNC-controlled and automated systems, especially among smaller machining companies operating only a limited number of machine tools. The economic return also depends on tool variety, machine utilisation, setup frequency and the ability of the user to standardise its tool-preparation process. Fragmented CNC controller environments can require additional post-processors, interfaces and implementation work, increasing total deployment costs. Entry-level equipment faces pricing pressure from regional Asian suppliers, while customers with simple tools and low changeover frequency may continue using manual measurement or in-machine setting solutions. Cyclical weakness in the wider machine-tool industry can further delay discretionary investment in auxiliary equipment, even where the longer-term productivity case remains positive.

Opportunities

The strongest opportunities are associated with digital manufacturing, automated tool rooms and the replacement of manual tool-data entry. Manufacturers can expand value per installation by offering controller-specific data transfer, RFID integration, cloud or networked tool databases, automated inspection macros and modular connections to shrinking and balancing equipment. Emerging manufacturing markets also offer opportunities for locally assembled mid-range systems that combine competitive pricing with responsive calibration and application support. In developed markets, the installed base creates recurring opportunities for software upgrades, interface retrofits and replacement of older projection-based equipment with camera-based systems. Specialised measurement functions for gear-skiving tools, large cutting assemblies, turning tools and other complex geometries provide further differentiation, particularly where standard entry-level systems cannot meet process requirements.

Challenges

A major industry challenge is maintaining measurement reliability across diverse toolholder interfaces, cutting geometries, environmental conditions and operator skill levels. Suppliers must combine mechanical stability, spindle repeatability, optics, lighting, image-processing algorithms and controller connectivity within a system that remains practical on the shop floor. The absence of a single universal tool-data architecture means that manufacturers must support numerous CNC controls, machine brands, tool-management formats and customer-specific workflows. Cybersecurity and regulatory requirements will become more relevant as connected measuring equipment incorporates industrial computers, remote-service functions and production-network access. Competitive pressure may also divide the market between highly integrated premium platforms and low-cost stand-alone machines, making it more difficult for undifferentiated mid-range suppliers to preserve margins and channel loyalty.

Industry Chain Analysis

The upstream segment of the CNC Tool Presetting and Measuring Machine industry comprises precision castings or granite structures, linear guides and scales, toolholder spindles and adapters, optical lenses, illumination components, CCD or CMOS cameras, industrial computers, displays, motors, controllers and measurement software. Mechanical rigidity, thermal stability, spindle concentricity and optical-system performance have a direct influence on achievable accuracy and equipment cost. High-end systems also require proprietary image-processing algorithms, extensive measuring-macro libraries and controller-specific communication modules, increasing the importance of software engineering alongside traditional machine construction.

Midstream manufacturers integrate these components into bench-top, vertical, horizontal and automated systems, then perform calibration, application configuration and data-interface development. Value creation is concentrated in system design, precision assembly, measurement software, tool-geometry expertise and customer-specific integration rather than in commodity mechanical components alone.

Downstream channels include direct sales, tooling-system partners, machine-tool distributors and specialised metrology networks. End users assess total value through reduced setup time, lower scrap, improved machine utilisation and more reliable tool-data flow. Premium suppliers generally obtain stronger margins from software,

automation options, specialised adapters and lifecycle support, while basic manual and projection systems compete more heavily on manufacturing cost and distributor reach.

Segment Insights

Digital image processing systems form the largest product segment because they provide a practical balance between measurement accuracy, operating speed, automation capability and total equipment cost. These machines increasingly replace conventional optical projection systems in professional machining environments, although projection and manual products retain a meaningful unit-volume position among small workshops, training facilities and price-sensitive users. Vertical floor-standing machines represent the principal structural configuration because they can measure most rotating milling, drilling, boring and reaming assemblies across a broad range of tool lengths and diameters. Bench-top products address machine-side and lower-volume applications, while horizontal systems remain a specialised category for turning tools and turret-based assemblies.

By automation level, manual and semi-automatic equipment continues to account for the majority of unit shipments, whereas fully automatic and robotic systems generate higher revenue per installation and offer the strongest technology-led growth opportunity. Network-connected and RFID-enabled configurations are gaining share as customers seek to eliminate manual data entry and connect tool preparation with broader manufacturing systems. Integrated combinations covering measuring, shrinking, assembly or robotic handling remain a smaller segment, but their strategic importance is increasing in central tool rooms and highly automated plants.

Downstream Market Opportunities

The most attractive downstream opportunities arise where expensive machining assets, complex cutting tools and frequent production changeovers make offline tool preparation economically compelling. Aerospace and defence manufacturers require accurate measurement of long, large or specialised tools and place a high value on traceability and process reliability. Automotive and powertrain production supports demand for standardised, repeatable and increasingly automated tool-preparation processes across multiple machining lines. Mould and die, medical-device and precision-engineering applications provide opportunities for high-resolution imaging, edge inspection and profile comparison. General machinery and independent job shops represent a broader volume market for compact and mid-range systems, particularly as

labour constraints and shorter production batches increase the cost of manual setting and machine-side data entry.

Regional Insights

Europe remains the largest high-value regional market and the principal manufacturing base, supported by a dense concentration of specialist suppliers in Germany, Italy and Switzerland. European manufacturers maintain strong positions in premium optical measurement, integrated tool preparation, software and international distribution. Nevertheless, the regional investment environment remains sensitive to the machine-tool cycle. CECIMO estimated that European machine-tool production declined by approximately 6.6% in 2025, indicating continued near-term caution in manufacturing capital expenditure despite the long-term need for automation and productivity improvement.

Asia represents the most important source of incremental market opportunity. Japan has an established supplier base and substantial demand from automotive and precision-machining industries, while China is developing a layered market combining imported premium systems, domestically produced mid-range equipment and lower-cost projection products. Chinese suppliers are improving image-processing, software and automatic measurement capabilities, although international service networks and high-end installed bases remain limited. India and Taiwan provide smaller but expanding regional supply pools focused mainly on entry-level and mid-range equipment. North America remains a significant premium demand market but has relatively few independent domestic manufacturers, resulting in a larger role for imported systems, branded suppliers and distribution partnerships.

Competitive Landscape Analysis

The competitive landscape is moderately concentrated after manufacturers, brands, distributors and historical entities are properly separated. The formal competitive pool contains approximately 20 core manufacturers, while the broader longlist contains more than 30 relevant manufacturers, branded suppliers and verification candidates. A small group of international leaders competes through broad product portfolios, extensive installed bases, measurement software, automated tool handling and global application support. A second tier of German, Italian, Swiss, Japanese and North American specialists relies on regional customer relationships, toolholding expertise or

differentiated capabilities such as large-tool measurement, turning-tool presetting and combined shrinking and measuring. Chinese, Taiwanese and Indian manufacturers compete principally through localisation, shorter delivery times and lower equipment prices, with selected suppliers moving into automatic camera-based systems. Consolidation is likely to remain selective and product-led, as illustrated by the 2026 merger of EVOSET and TRIMOS, with future transactions more likely to strengthen metrology platforms, software capabilities or geographic distribution than to create a highly consolidated global market.

Report Scope

This report studies the global CNC Tool Presetting and Measuring Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CNC Tool Presetting and Measuring Machine and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of CNC Tool Presetting and Measuring Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CNC Tool Presetting and Measuring Machine total production and demand, 2021-2032, (Units)

Global CNC Tool Presetting and Measuring Machine total production value, 2021-2032, (USD Million)

Global CNC Tool Presetting and Measuring Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global CNC Tool Presetting and Measuring Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: CNC Tool Presetting and Measuring Machine domestic

production, consumption, key domestic manufacturers and share

Global CNC Tool Presetting and Measuring Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global CNC Tool Presetting and Measuring Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global CNC Tool Presetting and Measuring Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global CNC Tool Presetting and Measuring Machine market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include E. ZOLLER GmbH & Co. KG, HAIMER GmbH, SPERONI S.p.A., Elbo Controlli S.r.l., KELCH GmbH, Omega Tool Measuring Machines, Inc., TRIMOS SA, KYORITSU SEIKI CORPORATION, NT TOOL CORPORATION, BIG DAISHOWA SEIKI CO., LTD., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World CNC Tool Presetting and Measuring Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global CNC Tool Presetting and Measuring Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global CNC Tool Presetting and Measuring Machine Market, Segmentation by Type:

Contact Measurement Systems

Optical Projection Systems

Digital Image Processing Systems

Others

Global CNC Tool Presetting and Measuring Machine Market, Segmentation by Level of Automation:

Manual Presetters

Semi-automatic and CNC-assisted Presetters

Fully Automatic Presetters

Others

Global CNC Tool Presetting and Measuring Machine Market, Segmentation by Core Repeated Measurement Precision:

Repeatability: $\pm 3-5 \text{ ?m}$

Repeatability: $\pm 1-2 \text{ ?m}$

Repeatability: $\pm 0.5 \text{ ?m}$

Global CNC Tool Presetting and Measuring Machine Market, Segmentation by Application:

Automotive and Powertrain

Aerospace and Defense

General Machinery and Job Shops

Others

Companies Profiled:

E. ZOLLER GmbH & Co. KG

HAIMER GmbH

SPERONI S.p.A.

Elbo Controlli S.r.l.

KELCH GmbH

Omega Tool Measuring Machines, Inc.

TRIMOS SA

KYORITSU SEIKI CORPORATION

NT TOOL CORPORATION

BIG DAISHOWA SEIKI CO., LTD.

BILZ WERKZEUGFABRIK GmbH & Co. KG

Helmut Diebold GmbH & Co.

M.Conti S.r.l.

Tianmen Jinbao...

Guangdong Rational Precision Instrument

YJMet

Dr. Heinrich Schneider Messtechnik

TORNG INDUSTRIAL CO., LTD.

Optomech Engineers Pvt. Ltd.

Chain Headway Co., Ltd.

Key Questions Answered:

1. How big is the global CNC Tool Presetting and Measuring Machine market?
2. What is the demand of the global CNC Tool Presetting and Measuring Machine market?
3. What is the year over year growth of the global CNC Tool Presetting and Measuring Machine market?

4. What is the production and production value of the global CNC Tool Presetting and Measuring Machine market?
5. Who are the key producers in the global CNC Tool Presetting and Measuring Machine market?
6. What are the growth factors driving the market demand?

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