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Global Model Based Definition (MBD) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Model Based Definition (MBD) market size is expected to reach $ 5638 million by 2032, rising at a market growth of 11.4% CAGR during the forecast period (2026-2032).

Model Based Definition (MBD) is a digital product-definition approach in which an authoritative 3D model carries the information required to define, manufacture, inspect and communicate a product throughout downstream engineering workflows. In addition to nominal geometry, an MBD data set can incorporate Product Manufacturing Information (PMI), dimensions, Geometric Dimensioning and Tolerancing (GD&T), surface requirements, notes, material specifications, annotations, metadata and other engineering attributes. ISO 16792 recognizes both 3D model-only and 3D model with 2D drawing approaches to digital product definition, while ASME Y14.41 establishes practices for preparing and revising digital product-definition data sets. This study focuses on commercial Model Based Definition (MBD) software and related services used to create, enrich, validate, translate, publish, manage, collaborate on and reuse authoritative model-based product data. The market covers Software and Services, Cloud Based and On-premises deployment, Large Enterprises and SMEs, and demand from Aerospace & Defense, Automotive & Transportation, Industrial Machinery, Semiconductor & Electronics, Medical Devices, Energy & Heavy Industry and other manufacturing sectors. The research boundary therefore captures the software and service value generated around model-based product definition and its connection with manufacturing, quality, inspection, supplier collaboration and digital-thread workflows rather than treating MBD merely as a conventional 3D CAD annotation function.

Key Findings

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Model Based Definition is shifting product definition from drawing-centric documentation toward authoritative 3D models containing geometry, PMI and manufacturing requirements

The market spans software and implementation services across Cloud Based and On-premises deployment models for both large enterprises and SMEs

Aerospace and defense remain strategically important MBD applications because authoritative digital technical data supports production inspection procurement and sustainment workflows

Semantic PMI and standards-based data exchange are increasingly important for connecting engineering models with manufacturing inspection quality and supplier workflows

Competition combines integrated CAD and product-lifecycle platforms with specialized MBD publishing validation interoperability collaboration and inspection software providers

Market Trends

The Model Based Definition (MBD) market is evolving from a relatively narrow 3D annotation capability toward a machine-consumable product-data infrastructure for the broader digital thread. Earlier implementations frequently concentrated on displaying dimensions, GD&T and engineering notes within 3D CAD models; current development increasingly emphasizes semantic PMI, model validation, automated data extraction, standards-based exchange, supplier-accessible technical data packages and direct reuse of engineering information by manufacturing and inspection systems. NIST describes MBD as the engineering definition reused by downstream model-based manufacturing and inspection within a digital thread, highlighting data continuity rather than document substitution alone. At the same time, software delivery is broadening: traditional desktop and On-premises environments remain relevant for controlled engineering workflows, while SaaS and cloud-enabled collaboration are expanding access to engineering data outside core CAD users. PTC, for example, now offers both On-premises Creo and SaaS-oriented Creo+, illustrating this transition in the CAD/MBD software environment. Standards continue to develop alongside the technology. ISO 16792:2021 remains the published international standard for digital product definition data practices, while a new ISO/DIS 16792 revision entered the enquiry stage in 2026, reinforcing the industry's continued focus on standardized digital product-definition

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practices.

Market Dynamics

Drivers

The primary driver for Model Based Definition (MBD) adoption is the need to maintain a consistent engineering definition from product design through manufacturing, quality, procurement and service. Traditional combinations of 3D models, separate 2D drawings, spreadsheets and disconnected documents can introduce duplicated information and synchronization requirements, whereas MBD establishes the 3D product definition as the principal information carrier. PTC describes MBD as a single source of truth containing product and manufacturing information that can be reused by downstream teams and suppliers, while NIST places MBD at the beginning of the digital thread linking model-based manufacturing and inspection. Increasing product complexity, distributed engineering organizations, shortened development cycles, automated inspection and demand for traceable digital product data therefore strengthen the economic rationale for MBD, particularly in industries where engineering changes, tolerance requirements and supplier coordination are intensive.

Restraints

MBD implementation requires more than purchasing a 3D annotation module. Enterprises must establish modeling practices, annotation rules, product-data governance, CAD/PLM integration, employee capabilities and downstream processes capable of consuming authoritative 3D data. Existing manufacturing organizations frequently retain substantial installed bases of drawing-oriented workflows, legacy CAD data and suppliers with heterogeneous software capabilities, creating migration and interoperability costs. NIST research on model-based manufacturing identifies data-transition and exchange gaps between manufacturing processes as an important obstacle to realizing a seamless digital thread. The coexistence of native CAD formats, neutral exchange standards and different interpretations of PMI can further increase validation requirements. As a result, MBD deployment often progresses by product family, facility or program rather than through immediate enterprise-wide replacement of conventional engineering documentation.

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Opportunities

The largest structural opportunity for Model Based Definition (MBD) lies in extending authoritative model data beyond design engineering into manufacturing planning, automated inspection, quality management, procurement, technical publishing and external supplier collaboration. Machine-readable semantic PMI enables downstream software to consume dimensions, tolerances and manufacturing characteristics rather than simply display them, opening opportunities for automated inspection planning, CMM programming, quality reporting and digital manufacturing. Capvidia's current MBD workflows, for example, use QIF and STEP AP242 to preserve geometry and PMI between engineering, manufacturing and quality processes, while Anark applies MBD data to technical data packages and model-based collaboration. Further opportunities are emerging in cloud-based collaboration, web-delivered digital data packages and integration between MBD, PLM, MES, quality and enterprise systems. These capabilities can expand the addressable user base from specialist CAD engineers to production personnel, inspectors, suppliers and lifecycle-service organizations.

Challenges

The long-term challenge is to make Model Based Definition (MBD) information consistently interpretable by people, enterprise systems and automated equipment across heterogeneous software environments. A visually correct annotation is not necessarily sufficient for downstream automation; semantic association between geometry, PMI and product characteristics must remain intact during translation, revision and data exchange. This creates continuing requirements for validation, interoperability testing, configuration control and standards compliance. The market must also address organizational change: engineering teams need disciplined authoring practices, downstream users need tools capable of consuming model-based information, and suppliers must align with customer-specific digital product-definition requirements. The continued evolution of ASME Y14 digital-product-definition standards and the ongoing revision of ISO 16792 illustrate that standardization remains an active part of the industry's development rather than a fully completed process.

Value Chain Analysis

The Model Based Definition (MBD) value chain begins with core 3D CAD geometry kernels, engineering-authoring environments, PMI and GD&T standards, product-data standards and computing infrastructure. The middle layer consists of MBD software

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vendors and service providers supplying authoring, annotation, tolerance definition, validation, CAD translation, interoperability, technical-data publishing, collaboration, lifecycle management and model-based quality functions. Value is increasingly created not only when engineering information is authored but when semantic data can be preserved and reused across systems. Downstream, MBD data feeds manufacturing engineering, CNC/CAM workflows, assembly planning, inspection, metrology, quality assurance, procurement, suppliers, maintenance and sustainment. The digital thread therefore links authoritative engineering definition with multiple operational functions. NIST explicitly describes MBD created by engineering as reusable by model-based manufacturing and model-based inspection, while U.S. Department of Defense technical-data requirements recognize models as part of authoritative technical data packages supporting acquisition, production, inspection, engineering and logistics. For software suppliers, recurring licenses or subscriptions create the core software value pool, while implementation, data migration, customization, standards compliance, training and workflow integration create an additional services layer.

Segment Insights

By Type, Software represents the core technology layer of the Model Based Definition (MBD) ecosystem, covering model authoring and annotation, semantic PMI, GD&T, model validation, translation, visualization, publishing, collaboration and quality-oriented data reuse. Services complement the software layer through MBD readiness assessment, implementation, legacy drawing conversion, template development, data migration, integration, process redesign, standards compliance and user training. The growing requirement to connect MBD with PLM, manufacturing and quality systems increases the importance of implementation services even as increasingly integrated software platforms reduce certain manual deployment tasks.

By Deployment Method, On-premises solutions remain structurally relevant where engineering data is tightly controlled, integration with established CAD/PLM infrastructure is extensive, or security requirements are particularly stringent. Cloud Based offerings create a different value proposition centered on simplified deployment, distributed collaboration, external supplier access and broader consumption of engineering information without requiring every downstream user to operate a full native CAD environment. PTC's coexistence of Creo and SaaS-oriented Creo+ demonstrates how MBD-capable engineering platforms are supporting both deployment models. By Organization Size, Large Enterprises typically have the deepest MBD requirements because they manage complex product structures, multi-site engineering organizations and extensive supplier networks, while SMEs represent an important opportunity as

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integrated CAD/MBD functionality, SaaS delivery and easier visualization lower the organizational threshold for adopting model-based workflows.

Downstream Market Opportunities

Aerospace & Defense is a strategically important downstream market for Model Based Definition (MBD) because product complexity, long lifecycle requirements, tightly controlled configurations and large supplier networks increase the value of authoritative digital technical data. U.S. Department of Defense MIL-STD-31000 defines the Technical Data Package as an authoritative technical definition used for its intended purpose, while associated DoD data descriptions identify models, drawings, specifications and quality information as technical data supporting acquisition, production, inspection, engineering and logistics. These requirements support demand for MBD authoring, validation, technical-data-package publishing, secure collaboration and supplier data exchange. Automotive & Transportation and Industrial Machinery offer similarly strong opportunities as manufacturers pursue shorter product-development cycles, greater configuration complexity and tighter integration between engineering and production.

Semiconductor & Electronics applications are becoming increasingly relevant where precision equipment, complex electromechanical assemblies and globally distributed supply chains require accurate product-definition exchange. Medical Devices can benefit from traceability, controlled engineering changes and tightly specified manufacturing and inspection requirements, while Energy & Heavy Industry offers opportunities in complex capital equipment and long-lifecycle assets. Across these sectors, the most attractive expansion opportunity is not simply replacing a drawing with a 3D view; it is enabling model information to flow directly into downstream manufacturing and quality applications. This shifts the value proposition of Model Based Definition (MBD) from engineering documentation efficiency toward process automation, traceability and enterprise-wide digital continuity.

Regional Insights

Regional development of the Model Based Definition (MBD) market is closely linked to the maturity of aerospace, automotive, advanced manufacturing and digital-engineering ecosystems rather than to a single universal adoption pattern. North America has a particularly mature institutional environment for model-based product definition because aerospace, defense and advanced manufacturing programs operate alongside

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established ASME Y14 digital-product-definition practices and U.S. Department of Defense technical-data-package requirements. ASME Y14.41 establishes requirements for digital product-definition data sets, while MIL-STD-31000 provides an active framework for authoritative technical data packages. Europe also represents an important MBD demand base through its aerospace, automotive, industrial machinery and precision-engineering industries, with ISO-based technical product documentation providing an important standards framework. ISO 16792:2021 formally supports both 3D model-only and 3D model with 2D drawing digital-product-definition methods.

Asia-Pacific presents substantial long-term opportunity as automotive, electronics, semiconductor equipment, industrial automation and high-end manufacturing supply chains continue to digitize engineering and quality workflows. Adoption patterns, however, can differ materially between multinational manufacturers, advanced domestic OEMs and smaller suppliers because CAD environments, customer requirements, standards familiarity and digital maturity vary across the supply chain. In emerging manufacturing markets, adoption is likely to progress initially through export-oriented suppliers, multinational production networks and high-value precision manufacturing applications where customer-defined PMI, inspection and digital technical-data requirements are strongest.

Competitive Landscape Analysis

The Model Based Definition (MBD) competitive landscape consists of several overlapping supplier groups rather than a single homogeneous software category. Integrated engineering-platform companies such as Siemens, PTC, Dassault Systèmes and Autodesk position MBD within broader CAD, product development and lifecycle workflows, giving them advantages in native model authoring, associativity and integration with established engineering environments. PTC's Creo, for example, directly embeds MBD, dimensions, tolerances and annotations into the 3D model and connects these capabilities with downstream manufacturing workflows. Specialized providers including Anark Corporation, Capvidia, Theorem Solutions, Elysium and Tech Soft 3D focus more strongly on areas such as MBD translation, interoperability, validation, technical-data packaging, visualization and collaboration, creating value where customers operate multi-CAD environments or need to distribute authoritative data beyond engineering departments. Anark supports MBD translation and technical-data-package publishing, while Capvidia emphasizes semantic PMI, validation and standards-based QIF/STEP AP242 workflows.

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Hexagon Manufacturing Intelligence, Kubotek3D, FARO Technologies and Creaform (AMETEK) broaden competition toward inspection, metrology, validation and manufacturing-quality workflows, where the economic value of MBD depends on turning engineering definitions into executable downstream processes. Competitive differentiation is therefore increasingly determined by the ability to preserve semantic product information across the digital thread, integrate with heterogeneous CAD/PLM and quality systems, automate downstream reuse and make model-based data accessible to suppliers and non-CAD users. The market is consequently developing from competition around isolated authoring functions toward competition around continuity, interoperability and operational reuse of authoritative product data.

Report Scope

This report studies the global Model Based Definition (MBD) demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Model Based Definition (MBD), 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 Model Based Definition (MBD) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Model Based Definition (MBD) total market, 2021-2032, (USD Million)

Global Model Based Definition (MBD) total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Model Based Definition (MBD) total market, key domestic companies, and share, (USD Million)

Global Model Based Definition (MBD) revenue by player, revenue and market share 2021-2026, (USD Million)

Global Model Based Definition (MBD) total market by Type, CAGR, 2021-2032, (USD Million)

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Global Model Based Definition (MBD) total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Model Based Definition (MBD) market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens, PTC, Dassault Systèmes, Autodesk, Anark Corporation, Capvidia, Theorem Solutions, Hexagon Manufacturing Intelligence, Elysium, Tech Soft 3D, 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 Model Based Definition (MBD) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, 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 Model Based Definition (MBD) Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Market Segmentation

Global Model Based Definition (MBD) Market, Segmentation by Type:

Software

Services

Global Model Based Definition (MBD) Market, Segmentation by Deployment Method:

Cloud Based

On-premises

Global Model Based Definition (MBD) Market, Segmentation by Organization Size:

Large Enterprises

SMEs

Global Model Based Definition (MBD) Market, Segmentation by Application:

Aerospace & Defense

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Automotive & Transportation

Industrial Machinery

Semiconductor & Electronics

Medical Devices

Energy & Heavy Industry

Others

Companies Profiled:

Siemens

PTC

Dassault Systèmes

Autodesk

Anark Corporation

Capvidia

Theorem Solutions

Hexagon Manufacturing Intelligence

Elysium

Tech Soft 3D

Kubotek3D

FARO Technologies

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Creaform (AMETEK)

Key Questions Answered

1. How big is the global Model Based Definition (MBD) market?
2. What is the demand of the global Model Based Definition (MBD) market?
3. What is the year over year growth of the global Model Based Definition (MBD) market?
4. What is the total value of the global Model Based Definition (MBD) market?
5. Who are the Major Players in the global Model Based Definition (MBD) market?
6. What are the growth factors driving the market demand?

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