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# Global CNC Tool Presetting and Measuring Machine Market Growth 2026-2032

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## Abstracts

The global CNC Tool Presetting and Measuring Machine market size is predicted to grow from US$ 570 million in 2025 to US$ 851 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 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.

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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,

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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

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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,

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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-

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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

LP Information, Inc. (LPI) ' newest research report, the “CNC Tool Presetting and

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Measuring Machine Industry Forecast" looks at past sales and reviews total world CNC Tool Presetting and Measuring Machine sales in 2025, providing a comprehensive analysis by region and market sector of projected CNC Tool Presetting and Measuring Machine sales for 2026 through 2032. With CNC Tool Presetting and Measuring Machine sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world CNC Tool Presetting and Measuring Machine industry.

This Insight Report provides a comprehensive analysis of the global CNC Tool Presetting and Measuring Machine landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on CNC Tool Presetting and Measuring Machine portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global CNC Tool Presetting and Measuring Machine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for CNC Tool Presetting and Measuring Machine and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global CNC Tool Presetting and Measuring Machine.

This report presents a comprehensive overview, market shares, and growth opportunities of CNC Tool Presetting and Measuring Machine market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Contact Measurement Systems

Optical Projection Systems

Digital Image Processing Systems

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Others

## Segmentation by Level of Automation:

Manual Presetters

Semi-automatic and CNC-assisted Presetters

Fully Automatic Presetters

Others

## Segmentation by Core Repeated Measurement Precision:

Repeatability: ±3–5 ?m

Repeatability: ±1–2 ?m

Repeatability: ?±0.5 ?m

## Segmentation by Application:

Automotive and Powertrain

Aerospace and Defense

General Machinery and Job Shops

Others

## This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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…

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Guangdong Rational Precision Instrument

YJMet

Dr. Heinrich Schneider Messtechnik

TORNG INDUSTRIAL CO., LTD.

Optomech Engineers Pvt. Ltd.

Chain Headway Co., Ltd.

## Key Questions Addressed in this Report

What is the 10-year outlook for the global CNC Tool Presetting and Measuring Machine market?

What factors are driving CNC Tool Presetting and Measuring Machine market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do CNC Tool Presetting and Measuring Machine market opportunities vary by end market size?

How does CNC Tool Presetting and Measuring Machine break out by Type, by Application?

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# Contents

## 1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

## 2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global CNC Tool Presetting and Measuring Machine Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for CNC Tool Presetting and Measuring Machine by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for CNC Tool Presetting and Measuring Machine by Country/Region, 2021, 2025 & 2032
2.2 CNC Tool Presetting and Measuring Machine Segment by Type
  2.2.1 Contact Measurement Systems
  2.2.2 Optical Projection Systems
  2.2.3 Digital Image Processing Systems
  2.2.4 Others
  2.2.5 CNC Tool Presetting and Measuring Machine Sales by Type
    2.2.5.1 Global CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
    2.2.5.2 Global CNC Tool Presetting and Measuring Machine Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global CNC Tool Presetting and Measuring Machine Sale Price by Type (2021-2026)
2.3 CNC Tool Presetting and Measuring Machine Segment by Level of Automation
  2.3.1 Manual Presetters
  2.3.2 Semi-automatic and CNC-assisted Presetters
  2.3.3 Fully Automatic Presetters
  2.3.4 Others
  2.3.5 CNC Tool Presetting and Measuring Machine Sales by Level of Automation

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2.3.5.1 Global CNC Tool Presetting and Measuring Machine Sales Market Share by Level of Automation (2021-2026)
2.3.5.2 Global CNC Tool Presetting and Measuring Machine Revenue and Market Share by Level of Automation (2021-2026)
2.3.5.3 Global CNC Tool Presetting and Measuring Machine Sale Price by Level of Automation (2021-2026)
2.4 CNC Tool Presetting and Measuring Machine Segment by Core Repeated Measurement Precision
2.4.1 Repeatability: ±3–5 ?m
2.4.2 Repeatability: ±1–2 ?m
2.4.3 Repeatability: ?±0.5 ?m
2.4.4 CNC Tool Presetting and Measuring Machine Sales by Core Repeated Measurement Precision
2.4.4.1 Global CNC Tool Presetting and Measuring Machine Sales Market Share by Core Repeated Measurement Precision (2021-2026)
2.4.4.2 Global CNC Tool Presetting and Measuring Machine Revenue and Market Share by Core Repeated Measurement Precision (2021-2026)
2.4.4.3 Global CNC Tool Presetting and Measuring Machine Sale Price by Core Repeated Measurement Precision (2021-2026)
2.5 CNC Tool Presetting and Measuring Machine Segment by Application
2.5.1 Automotive and Powertrain
2.5.2 Aerospace and Defense
2.5.3 General Machinery and Job Shops
2.5.4 Others
2.5.5 CNC Tool Presetting and Measuring Machine Sales by Application
2.5.5.1 Global CNC Tool Presetting and Measuring Machine Sale Market Share by Application (2021-2026)
2.5.5.2 Global CNC Tool Presetting and Measuring Machine Revenue and Market Share by Application (2021-2026)
2.5.5.3 Global CNC Tool Presetting and Measuring Machine Sale Price by Application (2021-2026)

## 3 GLOBAL BY COMPANY

3.1 Global CNC Tool Presetting and Measuring Machine Breakdown Data by Company
3.1.1 Global CNC Tool Presetting and Measuring Machine Annual Sales by Company (2021-2026)
3.1.2 Global CNC Tool Presetting and Measuring Machine Sales Market Share by Company (2021-2026)

+357 96 030922
info@marketpublishers.com

3.2 Global CNC Tool Presetting and Measuring Machine Annual Revenue by Company (2021-2026)
3.2.1 Global CNC Tool Presetting and Measuring Machine Revenue by Company (2021-2026)
3.2.2 Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Company (2021-2026)
3.3 Global CNC Tool Presetting and Measuring Machine Sale Price by Company
3.4 Key Manufacturers CNC Tool Presetting and Measuring Machine Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers CNC Tool Presetting and Measuring Machine Product Location Distribution
3.4.2 Players CNC Tool Presetting and Measuring Machine Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

**4 WORLD HISTORIC REVIEW FOR CNC TOOL PRESETTING AND MEASURING MACHINE BY GEOGRAPHIC REGION**

4.1 World Historic CNC Tool Presetting and Measuring Machine Market Size by Geographic Region (2021-2026)
4.1.1 Global CNC Tool Presetting and Measuring Machine Annual Sales by Geographic Region (2021-2026)
4.1.2 Global CNC Tool Presetting and Measuring Machine Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic CNC Tool Presetting and Measuring Machine Market Size by Country/Region (2021-2026)
4.2.1 Global CNC Tool Presetting and Measuring Machine Annual Sales by Country/Region (2021-2026)
4.2.2 Global CNC Tool Presetting and Measuring Machine Annual Revenue by Country/Region (2021-2026)
4.3 Americas CNC Tool Presetting and Measuring Machine Sales Growth
4.4 APAC CNC Tool Presetting and Measuring Machine Sales Growth
4.5 Europe CNC Tool Presetting and Measuring Machine Sales Growth
4.6 Middle East & Africa CNC Tool Presetting and Measuring Machine Sales Growth

**5 AMERICAS**

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5.1 Americas CNC Tool Presetting and Measuring Machine Sales by Country
5.1.1 Americas CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026)
5.1.2 Americas CNC Tool Presetting and Measuring Machine Revenue by Country (2021-2026)
5.2 Americas CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026)
5.3 Americas CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

**6 APAC**

6.1 APAC CNC Tool Presetting and Measuring Machine Sales by Region
6.1.1 APAC CNC Tool Presetting and Measuring Machine Sales by Region (2021-2026)
6.1.2 APAC CNC Tool Presetting and Measuring Machine Revenue by Region (2021-2026)
6.2 APAC CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026)
6.3 APAC CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

**7 EUROPE**

7.1 Europe CNC Tool Presetting and Measuring Machine by Country
7.1.1 Europe CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026)
7.1.2 Europe CNC Tool Presetting and Measuring Machine Revenue by Country (2021-2026)

+357 96 030922
info@marketpublishers.com

7.2 Europe CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026)
7.3 Europe CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

**8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa CNC Tool Presetting and Measuring Machine by Country
  8.1.1 Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026)
  8.1.2 Middle East & Africa CNC Tool Presetting and Measuring Machine Revenue by Country (2021-2026)
8.2 Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026)
8.3 Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

**9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

**10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of CNC Tool Presetting and Measuring Machine
10.3 Manufacturing Process Analysis of CNC Tool Presetting and Measuring Machine
10.4 Industry Chain Structure of CNC Tool Presetting and Measuring Machine

+357 96 030922
info@marketpublishers.com

## 11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 CNC Tool Presetting and Measuring Machine Distributors
11.3 CNC Tool Presetting and Measuring Machine Customer

## 12 WORLD FORECAST REVIEW FOR CNC TOOL PRESETTING AND MEASURING MACHINE BY GEOGRAPHIC REGION

12.1 Global CNC Tool Presetting and Measuring Machine Market Size Forecast by Region
  12.1.1 Global CNC Tool Presetting and Measuring Machine Forecast by Region (2027-2032)
  12.1.2 Global CNC Tool Presetting and Measuring Machine Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global CNC Tool Presetting and Measuring Machine Forecast by Type (2027-2032)
12.7 Global CNC Tool Presetting and Measuring Machine Forecast by Application (2027-2032)

## 13 KEY PLAYERS ANALYSIS

13.1 E. ZOLLER GmbH & Co. KG
  13.1.1 E. ZOLLER GmbH & Co. KG Company Information
  13.1.2 E. ZOLLER GmbH & Co. KG CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
  13.1.3 E. ZOLLER GmbH & Co. KG CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 E. ZOLLER GmbH & Co. KG Main Business Overview
  13.1.5 E. ZOLLER GmbH & Co. KG Latest Developments
13.2 HAIMER GmbH
  13.2.1 HAIMER GmbH Company Information

+357 96 030922
info@marketpublishers.com

13.2.2 HAIMER GmbH CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.2.3 HAIMER GmbH CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 HAIMER GmbH Main Business Overview
13.2.5 HAIMER GmbH Latest Developments
13.3 SPERONI S.p.A.
13.3.1 SPERONI S.p.A. Company Information
13.3.2 SPERONI S.p.A. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.3.3 SPERONI S.p.A. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 SPERONI S.p.A. Main Business Overview
13.3.5 SPERONI S.p.A. Latest Developments
13.4 Elbo Controlli S.r.l.
13.4.1 Elbo Controlli S.r.l. Company Information
13.4.2 Elbo Controlli S.r.l. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.4.3 Elbo Controlli S.r.l. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Elbo Controlli S.r.l. Main Business Overview
13.4.5 Elbo Controlli S.r.l. Latest Developments
13.5 KELCH GmbH
13.5.1 KELCH GmbH Company Information
13.5.2 KELCH GmbH CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.5.3 KELCH GmbH CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 KELCH GmbH Main Business Overview
13.5.5 KELCH GmbH Latest Developments
13.6 Omega Tool Measuring Machines, Inc.
13.6.1 Omega Tool Measuring Machines, Inc. Company Information
13.6.2 Omega Tool Measuring Machines, Inc. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.6.3 Omega Tool Measuring Machines, Inc. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Omega Tool Measuring Machines, Inc. Main Business Overview
13.6.5 Omega Tool Measuring Machines, Inc. Latest Developments
13.7 TRIMOS SA

+357 96 030922
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13.7.1 TRIMOS SA Company Information
13.7.2 TRIMOS SA CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.7.3 TRIMOS SA CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 TRIMOS SA Main Business Overview
13.7.5 TRIMOS SA Latest Developments
13.8 KYORITSU SEIKI CORPORATION
13.8.1 KYORITSU SEIKI CORPORATION Company Information
13.8.2 KYORITSU SEIKI CORPORATION CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.8.3 KYORITSU SEIKI CORPORATION CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 KYORITSU SEIKI CORPORATION Main Business Overview
13.8.5 KYORITSU SEIKI CORPORATION Latest Developments
13.9 NT TOOL CORPORATION
13.9.1 NT TOOL CORPORATION Company Information
13.9.2 NT TOOL CORPORATION CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.9.3 NT TOOL CORPORATION CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 NT TOOL CORPORATION Main Business Overview
13.9.5 NT TOOL CORPORATION Latest Developments
13.10 BIG DAISHOWA SEIKI CO., LTD.
13.10.1 BIG DAISHOWA SEIKI CO., LTD. Company Information
13.10.2 BIG DAISHOWA SEIKI CO., LTD. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.10.3 BIG DAISHOWA SEIKI CO., LTD. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 BIG DAISHOWA SEIKI CO., LTD. Main Business Overview
13.10.5 BIG DAISHOWA SEIKI CO., LTD. Latest Developments
13.11 BILZ WERKZEUGFABRIK GmbH & Co. KG
13.11.1 BILZ WERKZEUGFABRIK GmbH & Co. KG Company Information
13.11.2 BILZ WERKZEUGFABRIK GmbH & Co. KG CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.11.3 BILZ WERKZEUGFABRIK GmbH & Co. KG CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 BILZ WERKZEUGFABRIK GmbH & Co. KG Main Business Overview
13.11.5 BILZ WERKZEUGFABRIK GmbH & Co. KG Latest Developments

+357 96 030922
info@marketpublishers.com

13.12 Helmut Diebold GmbH & Co.
13.12.1 Helmut Diebold GmbH & Co. Company Information
13.12.2 Helmut Diebold GmbH & Co. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.12.3 Helmut Diebold GmbH & Co. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Helmut Diebold GmbH & Co. Main Business Overview
13.12.5 Helmut Diebold GmbH & Co. Latest Developments
13.13 M.Conti S.r.l.
13.13.1 M.Conti S.r.l. Company Information
13.13.2 M.Conti S.r.l. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.13.3 M.Conti S.r.l. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 M.Conti S.r.l. Main Business Overview
13.13.5 M.Conti S.r.l. Latest Developments
13.14 Tianmen Jinbao…
13.14.1 Tianmen Jinbao… Company Information
13.14.2 Tianmen Jinbao… CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.14.3 Tianmen Jinbao… CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Tianmen Jinbao… Main Business Overview
13.14.5 Tianmen Jinbao… Latest Developments
13.15 Guangdong Rational Precision Instrument
13.15.1 Guangdong Rational Precision Instrument Company Information
13.15.2 Guangdong Rational Precision Instrument CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.15.3 Guangdong Rational Precision Instrument CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Guangdong Rational Precision Instrument Main Business Overview
13.15.5 Guangdong Rational Precision Instrument Latest Developments
13.16 YJMet
13.16.1 YJMet Company Information
13.16.2 YJMet CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.16.3 YJMet CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 YJMet Main Business Overview

+357 96 030922
info@marketpublishers.com

13.16.5 YJMet Latest Developments
13.17 Dr. Heinrich Schneider Messtechnik
13.17.1 Dr. Heinrich Schneider Messtechnik Company Information
13.17.2 Dr. Heinrich Schneider Messtechnik CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.17.3 Dr. Heinrich Schneider Messtechnik CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Dr. Heinrich Schneider Messtechnik Main Business Overview
13.17.5 Dr. Heinrich Schneider Messtechnik Latest Developments
13.18 TORNG INDUSTRIAL CO., LTD.
13.18.1 TORNG INDUSTRIAL CO., LTD. Company Information
13.18.2 TORNG INDUSTRIAL CO., LTD. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.18.3 TORNG INDUSTRIAL CO., LTD. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 TORNG INDUSTRIAL CO., LTD. Main Business Overview
13.18.5 TORNG INDUSTRIAL CO., LTD. Latest Developments
13.19 Optomech Engineers Pvt. Ltd.
13.19.1 Optomech Engineers Pvt. Ltd. Company Information
13.19.2 Optomech Engineers Pvt. Ltd. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.19.3 Optomech Engineers Pvt. Ltd. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Optomech Engineers Pvt. Ltd. Main Business Overview
13.19.5 Optomech Engineers Pvt. Ltd. Latest Developments
13.20 Chain Headway Co., Ltd.
13.20.1 Chain Headway Co., Ltd. Company Information
13.20.2 Chain Headway Co., Ltd. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
13.20.3 Chain Headway Co., Ltd. CNC Tool Presetting and Measuring Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Chain Headway Co., Ltd. Main Business Overview
13.20.5 Chain Headway Co., Ltd. Latest Developments

**14 RESEARCH FINDINGS AND CONCLUSION**

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# List Of Tables

## LIST OF TABLES

Table 1. CNC Tool Presetting and Measuring Machine Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. CNC Tool Presetting and Measuring Machine Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Contact Measurement Systems
Table 4. Major Players of Optical Projection Systems
Table 5. Major Players of Digital Image Processing Systems
Table 6. Major Players of Others
Table 7. Global CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026) & (Units)
Table 8. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
Table 9. Global CNC Tool Presetting and Measuring Machine Revenue by Type (2021-2026) & ($ million)
Table 10. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Type (2021-2026)
Table 11. Global CNC Tool Presetting and Measuring Machine Sale Price by Type (2021-2026) & (US$/Unit)
Table 12. Major Players of Manual Presetters
Table 13. Major Players of Semi-automatic and CNC-assisted Presetters
Table 14. Major Players of Fully Automatic Presetters
Table 15. Major Players of Others
Table 16. Global CNC Tool Presetting and Measuring Machine Sales by Level of Automation (2021-2026) & (Units)
Table 17. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Level of Automation (2021-2026)
Table 18. Global CNC Tool Presetting and Measuring Machine Revenue by Level of Automation (2021-2026) & ($ million)
Table 19. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Level of Automation (2021-2026)
Table 20. Global CNC Tool Presetting and Measuring Machine Sale Price by Level of Automation (2021-2026) & (US$/Unit)
Table 21. Major Players of Repeatability: ±3–5 ?m
Table 22. Major Players of Repeatability: ±1–2 ?m
Table 23. Major Players of Repeatability: ?±0.5 ?m

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Table 24. Global CNC Tool Presetting and Measuring Machine Sales by Core Repeated Measurement Precision (2021-2026) & (Units)
Table 25. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Core Repeated Measurement Precision (2021-2026)
Table 26. Global CNC Tool Presetting and Measuring Machine Revenue by Core Repeated Measurement Precision (2021-2026) & ($ million)
Table 27. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Core Repeated Measurement Precision (2021-2026)
Table 28. Global CNC Tool Presetting and Measuring Machine Sale Price by Core Repeated Measurement Precision (2021-2026) & (US$/Unit)
Table 29. Global CNC Tool Presetting and Measuring Machine Sale by Application (2021-2026) & (Units)
Table 30. Global CNC Tool Presetting and Measuring Machine Sale Market Share by Application (2021-2026)
Table 31. Global CNC Tool Presetting and Measuring Machine Revenue by Application (2021-2026) & ($ million)
Table 32. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Application (2021-2026)
Table 33. Global CNC Tool Presetting and Measuring Machine Sale Price by Application (2021-2026) & (US$/Unit)
Table 34. Global CNC Tool Presetting and Measuring Machine Sales by Company (2021-2026) & (Units)
Table 35. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Company (2021-2026)
Table 36. Global CNC Tool Presetting and Measuring Machine Revenue by Company (2021-2026) & ($ millions)
Table 37. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Company (2021-2026)
Table 38. Global CNC Tool Presetting and Measuring Machine Sale Price by Company (2021-2026) & (US$/Unit)
Table 39. Key Manufacturers CNC Tool Presetting and Measuring Machine Producing Area Distribution and Sales Area
Table 40. Players CNC Tool Presetting and Measuring Machine Products Offered
Table 41. CNC Tool Presetting and Measuring Machine Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 42. New Products and Potential Entrants
Table 43. Market M&A Activity & Strategy
Table 44. Global CNC Tool Presetting and Measuring Machine Sales by Geographic Region (2021-2026) & (Units)

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Table 45. Global CNC Tool Presetting and Measuring Machine Sales Market Share Geographic Region (2021-2026)
Table 46. Global CNC Tool Presetting and Measuring Machine Revenue by Geographic Region (2021-2026) & ($ millions)
Table 47. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Geographic Region (2021-2026)
Table 48. Global CNC Tool Presetting and Measuring Machine Sales by Country/Region (2021-2026) & (Units)
Table 49. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Country/Region (2021-2026)
Table 50. Global CNC Tool Presetting and Measuring Machine Revenue by Country/Region (2021-2026) & ($ millions)
Table 51. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Country/Region (2021-2026)
Table 52. Americas CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026) & (Units)
Table 53. Americas CNC Tool Presetting and Measuring Machine Sales Market Share by Country (2021-2026)
Table 54. Americas CNC Tool Presetting and Measuring Machine Revenue by Country (2021-2026) & ($ millions)
Table 55. Americas CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026) & (Units)
Table 56. Americas CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026) & (Units)
Table 57. APAC CNC Tool Presetting and Measuring Machine Sales by Region (2021-2026) & (Units)
Table 58. APAC CNC Tool Presetting and Measuring Machine Sales Market Share by Region (2021-2026)
Table 59. APAC CNC Tool Presetting and Measuring Machine Revenue by Region (2021-2026) & ($ millions)
Table 60. APAC CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026) & (Units)
Table 61. APAC CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026) & (Units)
Table 62. Europe CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026) & (Units)
Table 63. Europe CNC Tool Presetting and Measuring Machine Revenue by Country (2021-2026) & ($ millions)
Table 64. Europe CNC Tool Presetting and Measuring Machine Sales by Type

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(2021-2026) & (Units)
Table 65. Europe CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026) & (Units)
Table 66. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Country (2021-2026) & (Units)
Table 67. Middle East & Africa CNC Tool Presetting and Measuring Machine Revenue Market Share by Country (2021-2026)
Table 68. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Type (2021-2026) & (Units)
Table 69. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales by Application (2021-2026) & (Units)
Table 70. Key Market Drivers & Growth Opportunities of CNC Tool Presetting and Measuring Machine
Table 71. Key Market Challenges & Risks of CNC Tool Presetting and Measuring Machine
Table 72. Key Industry Trends of CNC Tool Presetting and Measuring Machine
Table 73. CNC Tool Presetting and Measuring Machine Raw Material
Table 74. Key Suppliers of Raw Materials
Table 75. CNC Tool Presetting and Measuring Machine Distributors List
Table 76. CNC Tool Presetting and Measuring Machine Customer List
Table 77. Global CNC Tool Presetting and Measuring Machine Sales Forecast by Region (2027-2032) & (Units)
Table 78. Global CNC Tool Presetting and Measuring Machine Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Americas CNC Tool Presetting and Measuring Machine Sales Forecast by Country (2027-2032) & (Units)
Table 80. Americas CNC Tool Presetting and Measuring Machine Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 81. APAC CNC Tool Presetting and Measuring Machine Sales Forecast by Region (2027-2032) & (Units)
Table 82. APAC CNC Tool Presetting and Measuring Machine Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 83. Europe CNC Tool Presetting and Measuring Machine Sales Forecast by Country (2027-2032) & (Units)
Table 84. Europe CNC Tool Presetting and Measuring Machine Revenue Forecast by Country (2027-2032) & ($ millions)
Table 85. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales Forecast by Country (2027-2032) & (Units)
Table 86. Middle East & Africa CNC Tool Presetting and Measuring Machine Revenue

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Forecast by Country (2027-2032) & ($ millions)
Table 87. Global CNC Tool Presetting and Measuring Machine Sales Forecast by Type (2027-2032) & (Units)
Table 88. Global CNC Tool Presetting and Measuring Machine Revenue Forecast by Type (2027-2032) & ($ millions)
Table 89. Global CNC Tool Presetting and Measuring Machine Sales Forecast by Application (2027-2032) & (Units)
Table 90. Global CNC Tool Presetting and Measuring Machine Revenue Forecast by Application (2027-2032) & ($ millions)
Table 91. E. ZOLLER GmbH & Co. KG Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 92. E. ZOLLER GmbH & Co. KG CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 93. E. ZOLLER GmbH & Co. KG CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 94. E. ZOLLER GmbH & Co. KG Main Business
Table 95. E. ZOLLER GmbH & Co. KG Latest Developments
Table 96. HAIMER GmbH Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 97. HAIMER GmbH CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 98. HAIMER GmbH CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 99. HAIMER GmbH Main Business
Table 100. HAIMER GmbH Latest Developments
Table 101. SPERONI S.p.A. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 102. SPERONI S.p.A. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 103. SPERONI S.p.A. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 104. SPERONI S.p.A. Main Business
Table 105. SPERONI S.p.A. Latest Developments
Table 106. Elbo Controlli S.r.l. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 107. Elbo Controlli S.r.l. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 108. Elbo Controlli S.r.l. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
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Table 109. Elbo Controlli S.r.l. Main Business
Table 110. Elbo Controlli S.r.l. Latest Developments
Table 111. KELCH GmbH Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 112. KELCH GmbH CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 113. KELCH GmbH CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 114. KELCH GmbH Main Business
Table 115. KELCH GmbH Latest Developments
Table 116. Omega Tool Measuring Machines, Inc. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 117. Omega Tool Measuring Machines, Inc. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 118. Omega Tool Measuring Machines, Inc. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 119. Omega Tool Measuring Machines, Inc. Main Business
Table 120. Omega Tool Measuring Machines, Inc. Latest Developments
Table 121. TRIMOS SA Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 122. TRIMOS SA CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 123. TRIMOS SA CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 124. TRIMOS SA Main Business
Table 125. TRIMOS SA Latest Developments
Table 126. KYORITSU SEIKI CORPORATION Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 127. KYORITSU SEIKI CORPORATION CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 128. KYORITSU SEIKI CORPORATION CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 129. KYORITSU SEIKI CORPORATION Main Business
Table 130. KYORITSU SEIKI CORPORATION Latest Developments
Table 131. NT TOOL CORPORATION Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
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Table 132. NT TOOL CORPORATION CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 133. NT TOOL CORPORATION CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 134. NT TOOL CORPORATION Main Business
Table 135. NT TOOL CORPORATION Latest Developments
Table 136. BIG DAISHOWA SEIKI CO., LTD. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 137. BIG DAISHOWA SEIKI CO., LTD. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 138. BIG DAISHOWA SEIKI CO., LTD. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 139. BIG DAISHOWA SEIKI CO., LTD. Main Business
Table 140. BIG DAISHOWA SEIKI CO., LTD. Latest Developments
Table 141. BILZ WERKZEUGFABRIK GmbH & Co. KG Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 142. BILZ WERKZEUGFABRIK GmbH & Co. KG CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 143. BILZ WERKZEUGFABRIK GmbH & Co. KG CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 144. BILZ WERKZEUGFABRIK GmbH & Co. KG Main Business
Table 145. BILZ WERKZEUGFABRIK GmbH & Co. KG Latest Developments
Table 146. Helmut Diebold GmbH & Co. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 147. Helmut Diebold GmbH & Co. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 148. Helmut Diebold GmbH & Co. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 149. Helmut Diebold GmbH & Co. Main Business
Table 150. Helmut Diebold GmbH & Co. Latest Developments
Table 151. M.Conti S.r.l. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 152. M.Conti S.r.l. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 153. M.Conti S.r.l. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 154. M.Conti S.r.l. Main Business
Table 155. M.Conti S.r.l. Latest Developments
Table 156. Tianmen Jinbao… Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 157. Tianmen Jinbao… CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 158. Tianmen Jinbao… CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 159. Tianmen Jinbao… Main Business
Table 160. Tianmen Jinbao… Latest Developments
Table 161. Guangdong Rational Precision Instrument Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 162. Guangdong Rational Precision Instrument CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 163. Guangdong Rational Precision Instrument CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 164. Guangdong Rational Precision Instrument Main Business
Table 165. Guangdong Rational Precision Instrument Latest Developments
Table 166. YJMet Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 167. YJMet CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 168. YJMet CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 169. YJMet Main Business
Table 170. YJMet Latest Developments
Table 171. Dr. Heinrich Schneider Messtechnik Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 172. Dr. Heinrich Schneider Messtechnik CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 173. Dr. Heinrich Schneider Messtechnik CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 174. Dr. Heinrich Schneider Messtechnik Main Business
Table 175. Dr. Heinrich Schneider Messtechnik Latest Developments
Table 176. TORNG INDUSTRIAL CO., LTD. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
info@marketpublishers.com

Table 177. TORNG INDUSTRIAL CO., LTD. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 178. TORNG INDUSTRIAL CO., LTD. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 179. TORNG INDUSTRIAL CO., LTD. Main Business
Table 180. TORNG INDUSTRIAL CO., LTD. Latest Developments
Table 181. Optomech Engineers Pvt. Ltd. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 182. Optomech Engineers Pvt. Ltd. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 183. Optomech Engineers Pvt. Ltd. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 184. Optomech Engineers Pvt. Ltd. Main Business
Table 185. Optomech Engineers Pvt. Ltd. Latest Developments
Table 186. Chain Headway Co., Ltd. Basic Information, CNC Tool Presetting and Measuring Machine Manufacturing Base, Sales Area and Its Competitors
Table 187. Chain Headway Co., Ltd. CNC Tool Presetting and Measuring Machine Product Portfolios and Specifications
Table 188. Chain Headway Co., Ltd. CNC Tool Presetting and Measuring Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 189. Chain Headway Co., Ltd. Main Business
Table 190. Chain Headway Co., Ltd. Latest Developments

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# List Of Figures

## LIST OF FIGURES

Figure 1. Picture of CNC Tool Presetting and Measuring Machine
Figure 2. CNC Tool Presetting and Measuring Machine Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global CNC Tool Presetting and Measuring Machine Sales Growth Rate 2021-2032 (Units)
Figure 7. Global CNC Tool Presetting and Measuring Machine Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. CNC Tool Presetting and Measuring Machine Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. CNC Tool Presetting and Measuring Machine Sales Market Share by Country/Region (2025)
Figure 10. CNC Tool Presetting and Measuring Machine Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Contact Measurement Systems
Figure 12. Product Picture of Optical Projection Systems
Figure 13. Product Picture of Digital Image Processing Systems
Figure 14. Product Picture of Others
Figure 15. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Type in 2026
Figure 16. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Manual Presetters
Figure 18. Product Picture of Semi-automatic and CNC-assisted Presetters
Figure 19. Product Picture of Fully Automatic Presetters
Figure 20. Product Picture of Others
Figure 21. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Level of Automation in 2026
Figure 22. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Level of Automation (2021-2026)
Figure 23. Product Picture of Repeatability: ±3–5 ?m
Figure 24. Product Picture of Repeatability: ±1–2 ?m
Figure 25. Product Picture of Repeatability: ?±0.5 ?m
Figure 26. Global CNC Tool Presetting and Measuring Machine Sales Market Share by

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Core Repeated Measurement Precision in 2026
Figure 27. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Core Repeated Measurement Precision (2021-2026)
Figure 28. CNC Tool Presetting and Measuring Machine Consumed in Automotive and Powertrain
Figure 29. Global CNC Tool Presetting and Measuring Machine Market: Automotive and Powertrain (2021-2026) & (Units)
Figure 30. CNC Tool Presetting and Measuring Machine Consumed in Aerospace and Defense
Figure 31. Global CNC Tool Presetting and Measuring Machine Market: Aerospace and Defense (2021-2026) & (Units)
Figure 32. CNC Tool Presetting and Measuring Machine Consumed in General Machinery and Job Shops
Figure 33. Global CNC Tool Presetting and Measuring Machine Market: General Machinery and Job Shops (2021-2026) & (Units)
Figure 34. CNC Tool Presetting and Measuring Machine Consumed in Others
Figure 35. Global CNC Tool Presetting and Measuring Machine Market: Others (2021-2026) & (Units)
Figure 36. Global CNC Tool Presetting and Measuring Machine Sale Market Share by Application (2025)
Figure 37. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Application in 2025
Figure 38. CNC Tool Presetting and Measuring Machine Sales by Company in 2025 (Units)
Figure 39. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Company in 2025
Figure 40. CNC Tool Presetting and Measuring Machine Revenue by Company in 2025 ($ millions)
Figure 41. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Company in 2025
Figure 42. Global CNC Tool Presetting and Measuring Machine Sales Market Share by Geographic Region (2021-2026)
Figure 43. Global CNC Tool Presetting and Measuring Machine Revenue Market Share by Geographic Region in 2025
Figure 44. Americas CNC Tool Presetting and Measuring Machine Sales 2021-2026 (Units)
Figure 45. Americas CNC Tool Presetting and Measuring Machine Revenue 2021-2026 ($ millions)
Figure 46. APAC CNC Tool Presetting and Measuring Machine Sales 2021-2026 (Units)

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Figure 47. APAC CNC Tool Presetting and Measuring Machine Revenue 2021-2026 ($ millions)
Figure 48. Europe CNC Tool Presetting and Measuring Machine Sales 2021-2026 (Units)
Figure 49. Europe CNC Tool Presetting and Measuring Machine Revenue 2021-2026 ($ millions)
Figure 50. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales 2021-2026 (Units)
Figure 51. Middle East & Africa CNC Tool Presetting and Measuring Machine Revenue 2021-2026 ($ millions)
Figure 52. Americas CNC Tool Presetting and Measuring Machine Sales Market Share by Country in 2025
Figure 53. Americas CNC Tool Presetting and Measuring Machine Revenue Market Share by Country (2021-2026)
Figure 54. Americas CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
Figure 55. Americas CNC Tool Presetting and Measuring Machine Sales Market Share by Application (2021-2026)
Figure 56. United States CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 57. Canada CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 58. Mexico CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 59. Brazil CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 60. APAC CNC Tool Presetting and Measuring Machine Sales Market Share by Region in 2025
Figure 61. APAC CNC Tool Presetting and Measuring Machine Revenue Market Share by Region (2021-2026)
Figure 62. APAC CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
Figure 63. APAC CNC Tool Presetting and Measuring Machine Sales Market Share by Application (2021-2026)
Figure 64. China CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 65. Japan CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 66. South Korea CNC Tool Presetting and Measuring Machine Revenue Growth

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2021-2026 ($ millions)
Figure 67. Southeast Asia CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 68. India CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 69. Australia CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 70. China Taiwan CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 71. Europe CNC Tool Presetting and Measuring Machine Sales Market Share by Country in 2025
Figure 72. Europe CNC Tool Presetting and Measuring Machine Revenue Market Share by Country (2021-2026)
Figure 73. Europe CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
Figure 74. Europe CNC Tool Presetting and Measuring Machine Sales Market Share by Application (2021-2026)
Figure 75. Germany CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 76. France CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 77. UK CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 78. Italy CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 79. Russia CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 80. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales Market Share by Country (2021-2026)
Figure 81. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales Market Share by Type (2021-2026)
Figure 82. Middle East & Africa CNC Tool Presetting and Measuring Machine Sales Market Share by Application (2021-2026)
Figure 83. Egypt CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 84. South Africa CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 85. Israel CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)

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Figure 86. Turkey CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 87. GCC Countries CNC Tool Presetting and Measuring Machine Revenue Growth 2021-2026 ($ millions)
Figure 88. Manufacturing Cost Structure Analysis of CNC Tool Presetting and Measuring Machine in 2026
Figure 89. Manufacturing Process Analysis of CNC Tool Presetting and Measuring Machine
Figure 90. Industry Chain Structure of CNC Tool Presetting and Measuring Machine
Figure 91. Channels of Distribution
Figure 92. Global CNC Tool Presetting and Measuring Machine Sales Market Forecast by Region (2027-2032)
Figure 93. Global CNC Tool Presetting and Measuring Machine Revenue Market Share Forecast by Region (2027-2032)
Figure 94. Global CNC Tool Presetting and Measuring Machine Sales Market Share Forecast by Type (2027-2032)
Figure 95. Global CNC Tool Presetting and Measuring Machine Revenue Market Share Forecast by Type (2027-2032)
Figure 96. Global CNC Tool Presetting and Measuring Machine Sales Market Share Forecast by Application (2027-2032)
Figure 97. Global CNC Tool Presetting and Measuring Machine Revenue Market Share Forecast by Application (2027-2032)

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