

3D Metrology Market by Coordinate Measuring Machine (CMM), Optical Digitizer and Scanner (ODS), Form Measurement Equipment, X-ray and CT Equipment, Video Measuring Machine (VMM) and 3D Automated Optical Inspection System - Global Forecast to 2029

<https://marketpublishers.com/r/3325CF90B7C3EN.html>

Date: December 2024

Pages: 358

Price: US\$ 4,950.00 (Single User License)

ID: 3325CF90B7C3EN

Abstracts

The global 3D metrology market was valued at USD 11.13 billion in 2024 and is projected to reach USD 15.01 billion by 2029; it is expected to register a CAGR of 6.2% during the forecast period.

Increasing applications of cloud computing services, rising popularity of AI-powered metrology tools, growing adoption of EVs and AVs globally, rapid adoption of Industry 4.0, increasing application of big data analytics in metrology industry, and growing emphasis on quality control in the manufacturing sector are the major drivers contributing to the market growth.

“The 3D laser scanner segment for ODS is expected to grow at the highest CAGR during the forecast period.”

The 3D laser scanner segment is expected to exhibit the fastest CAGR in the 3D metrology market for ODS. This segment's strong performance is largely driven by the high demand for 3D laser scanners, which are favored for their multiple advantages. These scanners provide very precise inspection data and, when combined with a CMM, offer faster part inspections than other technologies. Additionally, they enable non-contact measures, which adds to their popularity. Moreover, several renowned 3D metrology firms are expanding and improving their ODS offerings which further fuels

segment growth.

The quality control and inspection segment likely to lead the 3D metrology market during the forecast period

Quality control and inspection are expected to dominate the 3D metrology market due to the increased emphasis on precision, consistency, and product quality across industries. Even minor flaws in manufacturing, particularly in the medical, automotive, semiconductor & electronics, and aerospace & defense industries, can result in expensive recalls or performance problems. 3D metrology enables high-precision measurements and the detection of variations in parts before they are moved to the next stage of production. This feature considerably decreases the risk of faults, scrap, and rework, hence increasing total production efficiency.

“China is likely to grow at the highest CAGR during the forecast period.”

China is anticipated to have the fastest CAGR during the from 2024 to 2029. This is because China is regarded as a global manufacturing leader, which boosts demand for 3D metrology solutions. According to the National Bureau of Statistics, in 2023, China accounted for about 30% of global gross manufacturing value, consolidating its status as the world's largest manufacturing country. Moreover, the country is also a leader in industries such as automotive and semiconductor & electronics. Original Equipment Manufacturers (OEMs) in China are focusing on increasing output in their automobile factories by considerably implementing quality assurance methods, which boosts the use of 3D metrology equipment.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type - Tier 1 – 55%, Tier 2 – 25%, Tier 3 – 20%

By Designation— Directors - 50%, Managers – 30%, Others - 20%

By Region—North America - 40%, Europe - 35%, Asia Pacific - 20%, RoW - 05%

The 3D metrology market is dominated by a few globally established players such

Hexagon AB (Sweden), ZEISS Group (Germany), FARO (US), Mitutoyo Corporation (Japan), KEYENCE CORPORATION (Japan), KLA Corporation (US), Renishaw plc (UK), and Nikon Corporation (Japan) among others and the study includes an in-depth competitive analysis of these key players in the 3D metrology market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the 3D metrology market and forecasts its size by offering, product type, application, end-use industry, and region. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It gives a detailed view of the market across four main regions—North America, Europe, Asia Pacific, and RoW. Value chain analysis has been included in the report, along with the key players and their competitive analysis in the 3D metrology ecosystem.

Key Benefits to Buy the Report:

Analysis of key drivers (rising adoption of EVs and AVs, emergence of 5G and IoT-enabled manufacturing, growing demand for AI-powered metrology tools, shift from labor-intensive manual inspections to advanced automated optical inspection systems, growing emphasis on quality control in manufacturing sector, rising application of big data analytics in metrology industry), Restraint (lack of standardization across metrology systems, high initial investments and maintenance costs), Opportunity (increasing demand for quality control in emerging industries, growing application of cloud computing services, adoption of Industry 4.0, development of devices with enhanced capabilities and modular architectures), Challenges (management of large volume of data, complexities of software solutions, limited availability of training centers)

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the 3D metrology market.

Market Development: Comprehensive information about lucrative markets – the report analyses the 3D metrology market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the 3D metrology market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and offerings of leading players like Hexagon AB (Sweden), ZEISS Group (Germany), FARO (US), Mitutoyo Corporation (Japan), KEYENCE CORPORATION (Japan), KLA Corporation (US), Renishaw plc (UK), Creaform (Canada), Nikon Corporation (Japan), InnovMetric Software Inc. (Canada), Nordson Corporation (US), and Perceptron, Inc. (US) among others in the 3D metrology market.

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