

Structural health monitoring Market by Offering (Hardware, Software & Services), Technology (Wired, Wireless), Vertical (Civil Infrastructure, Aerospace & Defense, Energy, Mining), Implementation, Application and Region - Global Forecast to 2029

<https://marketpublishers.com/r/S154D6C8E36EN.html>

Date: April 2024

Pages: 246

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

ID: S154D6C8E36EN

Abstracts

The global structural health monitoring market was valued at USD 2.5 billion in 2024 and is projected to reach USD 4.1 billion by 2029; it is expected to register a CAGR of 10.4% during the forecast period. The market's growth is driven by several key factors, including the rising significance of automated maintenance and repair for critical infrastructures, the far-reaching consequences of structural failures leading to loss of lives and capital, substantial investments in the infrastructure sector, stringent government regulations promoting sustainable construction practices, aging infrastructure prompting the adoption of structural health monitoring, and the cost efficiencies associated with the structural health monitoring industry.

“The hardware segment to hold the largest share during the forecast period.”

The hardware segment is anticipated to hold the largest share of the structural health monitoring market, primarily due to its integral role in measuring the physical properties of structures under surveillance. Within the hardware segment, sensors play a crucial role in collecting data for structural health monitoring systems. Wired structural health monitoring systems, which involve physical connections between sensors and data acquisition systems, are known for their stability and accuracy in data acquisition, making them a preferred choice for critical infrastructure monitoring applications.

“the wired technology segment to record largest market share during the forecast period.”

The wired technology holds a substantial market share in structural health monitoring. Wired systems establish physical connections between sensors and data acquisition units, providing a dependable and well-established approach to monitoring structural integrity. This method is frequently employed for overseeing extensive structures with stringent safety and durability criteria such as bridges, buildings, chimneys, offshore platforms, and nuclear facilities. Wired solutions are recognized for their stability and precision in data collection, making them a favored option for critical infrastructure monitoring where reliability and accuracy are paramount.

“The Aerospace & Defence is likely to grow at the highest CAGR during the forecast period.”

The Aerospace & Defense vertical is expected to experience highest market growth in the field of structural health monitoring. This growth is attributed to the non-destructive inspection of critical components in the aerospace industry to ensure safety and reliability. Companies like Testia and CURTISS-WRIGHT are prominent players in this sector, emphasizing the importance of structural health monitoring for aerospace applications. The rise in investments in infrastructure, particularly in the aerospace and defense sectors, is driving the demand for advanced monitoring systems to enhance safety and operational efficiency

“The Europe segment is likely to grow at the third highest CAGR during the forecast period.”

The European market for structural health monitoring market is experiencing significant growth, primarily attributed to several factors. The European structural health monitoring (SHM) market is poised for substantial growth due to multiple converging factors. Firstly, aging infrastructure across Europe, including bridges and transportation networks, necessitates proactive management through SHM to detect issues early and prevent costly failures. Secondly, increased government investment in infrastructure renovation projects presents opportunities for integrating SHM solutions to ensure infrastructure longevity and safety. Thirdly, stringent safety regulations drive the demand for SHM by providing continuous monitoring data to ensure compliance and prioritize public safety. Furthermore, SHM contributes to sustainability goals by extending the lifespan of structures and optimizing resource utilization. Technological advancements in sensor technology and digitalization in construction enhance the accessibility and integration of SHM solutions. Additionally, growing awareness and expertise, focus on non-destructive testing, cost benefits, and applications beyond traditional infrastructure

further fuel the growth of the SHM market in Europe.

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 – 50%, Tier 2 – 30%, Tier 3 – 20%

By Designation— C-level Executives - 35%, Directors - 30%, Others - 35%

By Region—North America - 40%, Europe - 25%, Asia Pacific - 20%, RoW - 15%

The structural health monitoring market is dominated by a few globally established players such as COWI A/S (Denmark), Campbell Scientific (US), Geokon (US), Nova Metrix LLC (US), SGS SA (Switzerland), Trimble Inc. (US), Structural Monitoring Systems PLC (Australia), Sixense (France), Digitexx Data Systems, Inc. (US), and Acellent Technologies, Inc. (US). The study includes an in-depth competitive analysis of these key players in the structural health monitoring market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the structural health monitoring market and forecasts its size by offering, by technology, implementation, application, vertical, 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. Supply chain analysis has been included in the report, along with the key players and their competitive analysis in the structural health monitoring ecosystem.

Key Benefits to Buy the Report:

Analysis of key drivers (automation in maintenance & repair of infrastructure, loss of life and capital due to structural failures, increasing infrastructure investments, government regulations pertaining to sustainable structures, aging infrastructure and benefits associated with structural health monitoring, reduced costs of structural health monitoring systems). Restraint (high installation and

monitoring costs, inaccurate results owing to errors in readings, slow adoption of structural health monitoring in developing countries). Opportunity (integration of advanced solutions for structural health monitoring, growing opportunities in Asia Pacific and GCC countries, advancements in sensor technologies, increasing investments in oil & gas and major energy projects). Challenges (dearth of skilled operators for installation and calibration of instruments, poor site conditions, technical challenges and operational factors, processing and management of large volumes of data)

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product and services launches in the structural health monitoring market.

Market Development: Comprehensive information about lucrative markets – the report analyses the structural health monitoring market across varied regions

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the structural health monitoring market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like COWI A/S (Denmark), Campbell Scientific (US), Geokon (US), Nova Metrix LLC (US), SGS SA (Switzerland), Trimble Inc. (US), Structural Monitoring Systems PLC (Australia), Sixense (France), Digitexx Data Systems, Inc. (US), and Acellent Technologies, Inc. (US) among others in the structural health monitoring market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 STRUCTURAL HEALTH MONITORING MARKET SEGMENTATION

1.3.2 REGIONAL SCOPE

1.3.3 YEARS CONSIDERED

1.3.4 INCLUSIONS AND EXCLUSIONS

1.4 CURRENCY CONSIDERED

1.5 UNITS CONSIDERED

1.6 LIMITATIONS

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

1.9 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 STRUCTURAL HEALTH MONITORING MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 List of key secondary sources

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 List of primary interview participants

2.1.2.2 Key data from primary sources

2.1.2.3 Key industry insights

2.1.2.4 Breakdown of primaries

2.1.3 SECONDARY AND PRIMARY RESEARCH

2.2 MARKET SIZE ESTIMATION METHODOLOGY

2.2.1 BOTTOM-UP APPROACH

2.2.1.1 Approach to arrive at market size using bottom-up analysis
(demand side)

FIGURE 3 STRUCTURAL HEALTH MONITORING MARKET: BOTTOM-UP
APPROACH

FIGURE 4 STRUCTURAL HEALTH MONITORING MARKET SIZE ESTIMATION:

Structural health monitoring Market by Offering (Hardware, Software & Services), Technology (Wired, Wireless),...

DEMAND-SIDE ANALYSIS

2.2.2 TOP-DOWN APPROACH

2.2.2.1 Approach to arrive at market size using top-down analysis

(supply side)

FIGURE 5 STRUCTURAL HEALTH MONITORING MARKET: TOP-DOWN APPROACH

FIGURE 6 STRUCTURAL HEALTH MONITORING MARKET SIZE ESTIMATION: SUPPLY-SIDE ANALYSIS

2.3 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 7 STRUCTURAL HEALTH MONITORING MARKET: DATA TRIANGULATION

2.4 RESEARCH ASSUMPTIONS

TABLE 1 STRUCTURAL HEALTH MONITORING MARKET: RESEARCH ASSUMPTIONS

2.5 RISK ASSESSMENT

TABLE 2 STRUCTURAL HEALTH MONITORING MARKET: RISK ASSESSMENT

2.6 RECESSION IMPACT

TABLE 3 STRUCTURAL HEALTH MONITORING MARKET: RECESSION IMPACT

2.7 RESEARCH LIMITATIONS

FIGURE 8 STRUCTURAL HEALTH MONITORING MARKET: RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 9 STRUCTURAL HEALTH MONITORING MARKET SIZE, 2020–2029 (USD MILLION)

FIGURE 10 HARDWARE OFFERINGS TO ACCOUNT FOR LARGER MARKET SHARE IN 2024

FIGURE 11 WIRED TECHNOLOGY TO DOMINATE STRUCTURAL HEALTH MONITORING MARKET BETWEEN 2024 AND 2029

FIGURE 12 CIVIL INFRASTRUCTURE VERTICAL TO HOLD LARGEST MARKET SHARE IN 2029

FIGURE 13 ASIA PACIFIC TO EXHIBIT HIGHEST CAGR IN STRUCTURAL HEALTH MONITORING MARKET FROM 2024 TO 2029

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN STRUCTURAL HEALTH MONITORING MARKET

FIGURE 14 RISING NEED TO MONITOR AGING INFRASTRUCTURE TO PROVIDE

LUCRATIVE OPPORTUNITIES FOR PLAYERS IN STRUCTURAL HEALTH MONITORING MARKET

4.2 STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING
FIGURE 15 HARDWARE TO ACCOUNT FOR LARGER SHARE OF STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, IN 2029

4.3 STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL
FIGURE 16 CIVIL INFRASTRUCTURE TO DOMINATE MARKET FROM 2024 TO 2029

4.4 STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY
FIGURE 17 WIRED TECHNOLOGY TO ACCOUNT FOR LARGER MARKET SHARE THAN WIRELESS TECHNOLOGY IN 2029

4.5 STRUCTURAL HEALTH MONITORING MARKET, BY REGION
FIGURE 18 NORTH AMERICA TO DOMINATE STRUCTURAL HEALTH MONITORING MARKET DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 19 STRUCTURAL HEALTH MONITORING MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Rising automation of structural repair and maintenance processes

5.2.1.2 Increasing number of structurally deficient bridges

FIGURE 20 NUMBER OF STRUCTURALLY DEFICIENT BRIDGES IN US, 2019–2023

5.2.1.3 Surging investment in infrastructure development projects

5.2.1.4 Increasing focus on developing advanced tools to ensure building safety

5.2.1.5 Growing concern about aging infrastructure

5.2.1.6 Rising adoption of micro-electromechanical systems and fiber optic sensors

FIGURE 21 IMPACT ANALYSIS: DRIVERS

5.2.2 RESTRAINTS

5.2.2.1 High installation and monitoring costs

5.2.2.2 Inaccurate readings due to design & calibration errors

TABLE 4 DESIGN AND CALIBRATION ERRORS AND CORRECTIVE MEASURES

5.2.2.3 Insufficient infrastructure investments in developing countries

FIGURE 22 IMPACT ANALYSIS: RESTRAINTS

5.2.3 OPPORTUNITIES

5.2.3.1 Introduction of AI-powered infrastructure asset management solutions

5.2.3.2 Population growth in emerging economies

5.2.3.3 Rapid advancement in sensor technologies

5.2.3.4 Increased funding for oil & gas projects

FIGURE 23 IMPACT ANALYSIS: OPPORTUNITIES

5.2.4 CHALLENGES

5.2.4.1 Shortage of highly skilled operators

5.2.4.2 Harsh weather and adverse site conditions

5.2.4.3 Complex installation processes

5.2.4.4 Difficulties in managing large volumes of data

FIGURE 24 IMPACT ANALYSIS: CHALLENGES

5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 25 STRUCTURAL HEALTH MONITORING MARKET:

TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.4 PRICING ANALYSIS

5.4.1 AVERAGE SELLING PRICE OF STRUCTURAL HEALTH MONITORING
SENSORS OFFERED BY KEY PLAYERS, BY TYPE

FIGURE 26 AVERAGE SELLING PRICE OF STRUCTURAL HEALTH MONITORING
SENSORS OFFERED BY KEY PLAYERS, BY TYPE (USD)

TABLE 5 AVERAGE SELLING PRICE OF STRUCTURAL HEALTH MONITORING
SENSORS OFFERED BY KEY PLAYERS, BY TYPE (USD)

5.4.2 AVERAGE SELLING PRICE OF STRUCTURAL HEALTH MONITORING
HARDWARE PRODUCTS, BY REGION

FIGURE 27 AVERAGE SELLING PRICE OF STRUCTURAL HEALTH MONITORING
HARDWARE PRODUCTS, BY REGION (USD)

5.5 SUPPLY CHAIN ANALYSIS

FIGURE 28 STRUCTURAL HEALTH MONITORING MARKET: SUPPLY CHAIN
ANALYSIS

5.6 ECOSYSTEM ANALYSIS

TABLE 6 ROLE OF COMPANIES IN STRUCTURAL HEALTH MONITORING
ECOSYSTEM

5.7 INVESTMENT AND FUNDING SCENARIO

FIGURE 29 STRUCTURAL HEALTH MONITORING MARKET: INVESTMENT AND
FUNDING SCENARIO

5.8 TECHNOLOGY ANALYSIS

5.8.1 KEY TECHNOLOGY

5.8.1.1 Data acquisition systems (DAS)

5.8.2 COMPLEMENTARY TECHNOLOGIES

5.8.2.1 Non-destructive testing (NDT)

5.8.2.2 Building information modeling (BIM)

5.8.3 ADJACENT TECHNOLOGIES

5.8.3.1 Digital twins

5.8.3.2 Robotics and drones

5.9 PATENT ANALYSIS

FIGURE 30 STRUCTURAL HEALTH MONITORING MARKET: PATENTS APPLIED AND GRANTED, 2014–2023

FIGURE 31 STRUCTURAL HEALTH MONITORING MARKET: ANALYSIS OF PATENTS GRANTED IN US AND EUROPE

TABLE 7 STRUCTURAL HEALTH MONITORING MARKET: LIST OF PATENTS, 2020–2023

5.10 TRADE ANALYSIS

5.10.1 IMPORT SCENARIO

FIGURE 32 IMPORT DATA FOR HS CODE 9015-COMPLIANT MEASURING AND SURVEYING INSTRUMENTS, 2018–2022

5.10.2 EXPORT SCENARIO

FIGURE 33 EXPORT DATA FOR HS CODE 9015-COMPLIANT MEASURING AND SURVEYING INSTRUMENTS, 2018–2022

5.11 KEY CONFERENCES AND EVENTS, 2024–2025

TABLE 8 STRUCTURAL HEALTH MONITORING MARKET: LIST OF KEY CONFERENCES AND EVENTS, 2024–2025

5.12 CASE STUDY ANALYSIS

5.12.1 KSEB PLANS TO INSTALL SAFETY AND RISK MANAGEMENT SOLUTIONS TO AVOID DAM FAILURE

5.12.2 ENCARDIO RITE OBTAINS CONTRACT TO PROVIDE ROCK MONITORING SOLUTIONS FOR IDENTIFYING FAULT ZONES

5.12.3 GEOCOMP PROVIDES MONITORING SERVICES TO EVALUATE IMPACT OF BRIDGE CONSTRUCTION ON ADJACENT STRUCTURES

5.13 TARIFF AND REGULATORY LANDSCAPE

5.13.1 TARIFF ANALYSIS

TABLE 9 MFN TARIFF FOR HS CODE 9015-COMPLIANT PRODUCTS EXPORTED BY US, 2023

5.13.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 10 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 11 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.14 PORTER'S FIVE FORCES ANALYSIS

FIGURE 34 STRUCTURAL HEALTH MONITORING MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 35 STRUCTURAL HEALTH MONITORING MARKET: PORTER'S FIVE FORCES IMPACT ANALYSIS

TABLE 14 STRUCTURAL HEALTH MONITORING MARKET: PORTER'S FIVE FORCES ANALYSIS, 2023

5.14.1 THREAT OF NEW ENTRANTS

5.14.2 THREAT OF SUBSTITUTES

5.14.3 BARGAINING POWER OF SUPPLIERS

5.14.4 BARGAINING POWER OF BUYERS

5.14.5 INTENSITY OF COMPETITIVE RIVALRY

5.15 KEY STAKEHOLDERS AND BUYING CRITERIA

5.15.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 36 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS

TABLE 15 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE VERTICALS (%)

5.15.2 BUYING CRITERIA

FIGURE 37 KEY BUYING CRITERIA FOR TOP THREE VERTICALS

TABLE 16 KEY BUYING CRITERIA FOR TOP THREE VERTICALS

6 IMPLEMENTATION METHODS FOR STRUCTURAL

HEALTH MONITORING SYSTEMS

6.1 INTRODUCTION

FIGURE 38 IMPLEMENTATION METHODS OF STRUCTURAL HEALTH MONITORING SYSTEMS

6.2 NEW CONSTRUCTION

6.3 RETROFITTING

7 APPLICATIONS OF STRUCTURAL HEALTH MONITORING SYSTEMS

7.1 INTRODUCTION

FIGURE 39 APPLICATIONS OF STRUCTURAL HEALTH MONITORING SYSTEMS

TABLE 17 APPLICATIONS, MONITORING PURPOSE, AND INSTRUMENTS USED IN STRUCTURAL HEALTH MONITORING

7.2 CRACK DETECTION

7.3 DAMAGE DETECTION

- 7.4 IMPACT MONITORING
- 7.5 CORROSION MONITORING
- 7.6 STRAIN MONITORING
- 7.7 HOTSPOT MONITORING
- 7.8 STATE SENSING
- 7.9 MULTI-MODAL SENSING
- 7.10 PRESSURE MONITORING
- 7.11 LEAKAGE DETECTION
- 7.12 DEFLECTION MONITORING
- 7.13 HURRICANE & EARTHQUAKE MONITORING

8 STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING

8.1 INTRODUCTION

FIGURE 40 STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING

TABLE 18 STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2020–2023 (USD MILLION)

TABLE 19 STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2024–2029 (USD MILLION)

FIGURE 41 HARDWARE SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE IN 2029

8.2 HARDWARE

TABLE 20 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 21 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

TABLE 22 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 23 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET, BY TYPE, 2024–2029 (USD MILLION)

FIGURE 42 SENSORS TO DOMINATE MARKET FOR HARDWARE DURING FORECAST PERIOD

8.2.1 SENSORS

TABLE 24 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY REGION, 2020–2023 (USD MILLION)

TABLE 25 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY REGION, 2024–2029 (USD MILLION)

TABLE 26 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY SENSOR TYPE, 2020–2023 (USD MILLION)

TABLE 27 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY SENSOR TYPE, 2024–2029 (USD MILLION)

TABLE 28 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY SENSOR TYPE, 2020–2023 (THOUSAND UNITS)

TABLE 29 HARDWARE: STRUCTURAL HEALTH MONITORING MARKET FOR SENSORS, BY SENSOR TYPE, 2024–2029 (THOUSAND UNITS)

8.2.1.1 Accelerometers

8.2.1.1.1 Need to measure gravity or dynamic loads and vibrations due to forces to fuel segmental growth

8.2.1.2 Displacement sensors

8.2.1.2.1 Adoption of linear variable differential transformers to monitor crack displacement to augment segmental growth

8.2.1.3 Tilt meters & inclinometers

8.2.1.3.1 Application of tilt meters & inclinometers in parallel displacement measurement to foster segmental growth

8.2.1.4 Strain gauges

8.2.1.4.1 Use of strain gauges to detect variations in strain distribution across structures to contribute to segmental growth

8.2.1.5 Corrosion sensors

8.2.1.5.1 Implementation of corrosion sensors for predictive maintenance analysis to facilitate segmental growth

8.2.1.6 Temperature sensors

8.2.1.6.1 Need to reduce cracking and spalling of structures due to sudden temperature changes to expedite segmental growth

8.2.1.7 Other sensor types

8.2.2 DATA ACQUISITION SYSTEMS

8.2.2.1 Adoption of data acquisition systems for real-time, remote monitoring of structures to accelerate market growth

TABLE 30 DATA ACQUISITION SYSTEMS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 31 DATA ACQUISITION SYSTEMS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

8.2.3 OTHER HARDWARE TYPES

TABLE 32 OTHER HARDWARE TYPES: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 33 OTHER HARDWARE TYPES: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

8.3 SOFTWARE & SERVICES

8.3.1 REQUIREMENT FOR SOFTWARE AND SERVICES FOR EARLY

STRUCTURAL DAMAGE DETECTION TO FOSTER SEGMENTAL GROWTH

8.3.2 PRE-INSTALLATION SERVICES

8.3.3 POST-INSTALLATION SERVICES

TABLE 34 SOFTWARE & SERVICES: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 35 SOFTWARE & SERVICES: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

9 STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY

9.1 INTRODUCTION

FIGURE 43 STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY

TABLE 36 STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 37 STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

FIGURE 44 WIRED TECHNOLOGY TO HOLD LARGER SHARE OF STRUCTURAL HEALTH MONITORING MARKET IN 2029

9.2 WIRED

9.2.1 LOW RISK OF DATA LOSS TO BOOST ADOPTION OF WIRED STRUCTURAL HEALTH MONITORING SYSTEMS

TABLE 38 WIRED: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 39 WIRED: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

9.3 WIRELESS

9.3.1 HIGH EFFICIENCY AND LOW MAINTENANCE COSTS TO FUEL DEMAND FOR WIRELESS STRUCTURAL HEALTH MANAGEMENT SYSTEMS

TABLE 40 WIRELESS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 41 WIRELESS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

10 STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL

10.1 INTRODUCTION

FIGURE 45 STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL

FIGURE 46 CIVIL INFRASTRUCTURE VERTICAL TO ACCOUNT FOR LARGEST MARKET SHARE IN 2029

TABLE 42 STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2020–2023 (USD MILLION)

TABLE 43 STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

10.2 CIVIL INFRASTRUCTURE

10.2.1 REQUIREMENT FOR REGULAR MONITORING OF CIVIL INFRASTRUCTURE TO CURB REPLACEMENT COSTS TO FUEL SEGMENTAL GROWTH

10.2.2 BRIDGES

10.2.3 TUNNELS

10.2.4 DAMS

10.2.5 BUILDINGS & STADIUMS

TABLE 44 MAJOR CIVIL INFRASTRUCTURE PROJECTS

FIGURE 47 CIVIL INFRASTRUCTURE TO RECORD HIGHEST CAGR IN STRUCTURAL HEALTH MONITORING MARKET IN ASIA PACIFIC DURING FORECAST PERIOD

TABLE 45 CIVIL INFRASTRUCTURE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 46 CIVIL INFRASTRUCTURE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

10.3 AEROSPACE & DEFENSE

10.3.1 NEED TO MINIMIZE RISK OF AIRCRAFT STRUCTURAL FAILURES TO ACCELERATE SEGMENTAL GROWTH

TABLE 47 MAJOR AEROSPACE & DEFENSE PROJECTS

FIGURE 48 AEROSPACE & DEFENSE VERTICAL TO ACCOUNT FOR LARGEST SHARE OF NORTH AMERICAN MARKET IN 2029

TABLE 48 AEROSPACE & DEFENSE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 49 AEROSPACE & DEFENSE: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

10.4 ENERGY

10.4.1 DEVELOPMENT OF WIND AND NUCLEAR ENERGY PROJECTS TO BOOST SEGMENTAL GROWTH

TABLE 50 MAJOR ENERGY PROJECTS

FIGURE 49 ENERGY VERTICAL TO EXHIBIT HIGHEST CAGR IN STRUCTURAL HEALTH MONITORING MARKET IN ASIA PACIFIC DURING FORECAST PERIOD

TABLE 51 ENERGY: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 52 ENERGY: STRUCTURAL HEALTH MONITORING MARKET, BY REGION,

2024–2029 (USD MILLION)

10.5 MINING

10.5.1 USE OF HEAVY ROTATING MACHINES IN MINING OPERATIONS TO FACILITATE SEGMENTAL GROWTH

TABLE 53 MAJOR MINING PROJECTS

FIGURE 50 MINING VERTICAL TO HOLD LARGEST SHARE OF STRUCTURAL HEALTH MONITORING MARKET IN EUROPE IN 2029

TABLE 54 MINING: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 55 MINING: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

10.6 OTHER VERTICALS

TABLE 56 MAJOR INDUSTRIAL MACHINERY, MARINE, AND AUTOMOTIVE & TRANSPORTATION PROJECTS

FIGURE 51 OTHER VERTICALS TO DOMINATE MARKET IN NORTH AMERICA BETWEEN 2024 AND 2029

TABLE 57 OTHER VERTICALS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 58 OTHER VERTICALS: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

11 STRUCTURAL HEALTH MONITORING MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 52 STRUCTURAL HEALTH MONITORING MARKET, BY REGION

FIGURE 53 INDIA TO EXHIBIT HIGHEST CAGR IN GLOBAL STRUCTURAL HEALTH MONITORING MARKET DURING FORECAST PERIOD

FIGURE 54 NORTH AMERICA TO DOMINATE STRUCTURAL HEALTH MONITORING MARKET FROM 2024 TO 2029

TABLE 59 STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 60 STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

11.2 NORTH AMERICA

11.2.1 RECESSION IMPACT ON STRUCTURAL HEALTH MONITORING MARKET IN NORTH AMERICA

FIGURE 55 NORTH AMERICA: RECESSION IMPACT ANALYSIS

FIGURE 56 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET SNAPSHOT

TABLE 61 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 62 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 63 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2020–2023 (USD MILLION)

TABLE 64 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 65 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 66 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 67 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2020–2023 (USD MILLION)

TABLE 68 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 69 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2020–2023 (USD MILLION)

TABLE 70 NORTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2024–2029 (USD MILLION)

11.2.2 US

11.2.2.1 Rising infrastructure and economic developments to drive market

TABLE 71 US: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 72 US: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.2.3 CANADA

11.2.3.1 Increasing investments in highway construction to contribute to market growth

TABLE 73 CANADA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 74 CANADA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.2.4 MEXICO

11.2.4.1 Growing emphasis on new infrastructure development to foster market growth

TABLE 75 MEXICO: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 76 MEXICO: STRUCTURAL HEALTH MONITORING MARKET, BY

TECHNOLOGY, 2024–2029 (USD MILLION)**11.3 EUROPE****11.3.1 RECESSION IMPACT ON STRUCTURAL HEALTH MONITORING MARKET IN EUROPE**

FIGURE 57 EUROPE: RECESSION IMPACT ANALYSIS

FIGURE 58 EUROPE: STRUCTURAL HEALTH MONITORING MARKET SNAPSHOT

TABLE 77 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 78 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 79 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2020–2023 (USD MILLION)

TABLE 80 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 81 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 82 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 83 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2020–2023 (USD MILLION)

TABLE 84 EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 85 EUROPE: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2020–2023 (USD MILLION)

TABLE 86 EUROPE: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2024–2029 (USD MILLION)

11.3.2 UK

11.3.2.1 Surging adoption of advanced monitoring systems to detect structural failures at early stage to augment market growth

TABLE 87 UK: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 88 UK: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.3.3 GERMANY

11.3.3.1 Growing population and new construction projects to facilitate market growth

TABLE 89 GERMANY: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 90 GERMANY: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.3.4 FRANCE

11.3.4.1 Rising investments in transport and industrial sectors to fuel market growth

TABLE 91 FRANCE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 92 FRANCE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.3.5 ITALY

11.3.5.1 Increasing number of large construction projects to propel market

TABLE 93 ITALY: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 94 ITALY: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.3.6 NETHERLANDS

11.3.6.1 Growing concern about aging infrastructure to boost demand

TABLE 95 NETHERLANDS: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 96 NETHERLANDS: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.3.7 REST OF EUROPE

TABLE 97 REST OF EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 98 REST OF EUROPE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4 ASIA PACIFIC

11.4.1 RECESSION IMPACT ON STRUCTURAL HEALTH MONITORING MARKET IN ASIA PACIFIC

FIGURE 59 ASIA PACIFIC: RECESSION IMPACT ANALYSIS

FIGURE 60 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET SNAPSHOT

TABLE 99 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 100 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 101 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2020–2023 (USD MILLION)

TABLE 102 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 103 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 104 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 105 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2020–2023 (USD MILLION)

TABLE 106 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 107 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2020–2023 (USD MILLION)

TABLE 108 ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2024–2029 (USD MILLION)

11.4.2 CHINA

11.4.2.1 Enforcement of strict regulations to ensure structural safety to drive market

TABLE 109 CHINA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 110 CHINA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4.3 JAPAN

11.4.3.1 High investments in large-scale infrastructure projects to expedite market growth

TABLE 111 JAPAN: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 112 JAPAN: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4.4 SOUTH KOREA

11.4.4.1 Increased skyscraper construction to contribute to market growth

TABLE 113 SOUTH KOREA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 114 SOUTH KOREA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4.5 INDIA

11.4.5.1 Government-led infrastructure investments to accelerate market growth

TABLE 115 INDIA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 116 INDIA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4.6 SINGAPORE

11.4.6.1 Construction of new subway lines to expedite market growth

TABLE 117 SINGAPORE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 118 SINGAPORE: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.4.7 REST OF ASIA PACIFIC

TABLE 119 REST OF ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 120 REST OF ASIA PACIFIC: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.5 ROW

11.5.1 RECESSION IMPACT ON STRUCTURAL HEALTH MONITORING MARKET IN ROW

FIGURE 61 ROW: RECESSION IMPACT ANALYSIS

FIGURE 62 ROW: STRUCTURAL HEALTH MONITORING MARKET SNAPSHOT

TABLE 121 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 122 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY REGION, 2024–2029 (USD MILLION)

TABLE 123 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2020–2023 (USD MILLION)

TABLE 124 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY VERTICAL, 2024–2029 (USD MILLION)

TABLE 125 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 126 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 127 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2020–2023 (USD MILLION)

TABLE 128 ROW: STRUCTURAL HEALTH MONITORING MARKET, BY OFFERING, 2024–2029 (USD MILLION)

TABLE 129 ROW: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2020–2023 (USD MILLION)

TABLE 130 ROW: STRUCTURAL HEALTH MONITORING MARKET FOR HARDWARE, BY TYPE, 2024–2029 (USD MILLION)

11.5.2 SOUTH AMERICA

11.5.2.1 Rising construction of dams and bridges to contribute to market growth

TABLE 131 SOUTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 132 SOUTH AMERICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

11.5.3 MIDDLE EAST & AFRICA

TABLE 133 MIDDLE EAST & AFRICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2020–2023 (USD MILLION)

TABLE 134 MIDDLE EAST & AFRICA: STRUCTURAL HEALTH MONITORING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)

TABLE 135 MIDDLE EAST & AFRICA: STRUCTURAL HEALTH MONITORING MARKET, BY GEOGRAPHY, 2020–2023 (USD MILLION)

TABLE 136 MIDDLE EAST & AFRICA: STRUCTURAL HEALTH MONITORING MARKET, BY GEOGRAPHY, 2024–2029 (USD MILLION)

11.5.3.1 GCC countries

11.5.3.1.1 Rising focus on managing essential infrastructure assets to propel market

11.5.3.2 Rest of Middle East & Africa

12 COMPETITIVE LANDSCAPE

12.1 OVERVIEW

12.2 STRATEGIES ADOPTED BY KEY PLAYERS, 2020–2023

TABLE 137 OVERVIEW OF STRATEGIES ADOPTED BY KEY MID- AND HIGH-LEVEL PLAYERS IN STRUCTURAL HEALTH MONITORING MARKET, 2020–2023

12.3 REVENUE ANALYSIS OF KEY PLAYERS, 2019–2023

FIGURE 63 REVENUE ANALYSIS OF FIVE KEY PLAYERS, 2019–2023

12.4 MARKET SHARE ANALYSIS, 2023

FIGURE 64 STRUCTURAL HEALTH MONITORING MARKET SHARE ANALYSIS, 2023

TABLE 138 STRUCTURAL HEALTH MONITORING MARKET: DEGREE OF COMPETITION, 2023

12.5 COMPANY VALUATION AND FINANCIAL METRICS

FIGURE 65 COMPANY VALUATION, 2023 (USD BILLION)

FIGURE 66 FINANCIAL METRICS (EV/EBITDA), 2023

12.6 BRAND/PRODUCT COMPARISON

FIGURE 67 BRAND/PRODUCT COMPARISON

12.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

FIGURE 68 STRUCTURAL HEALTH MONITORING MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

12.7.1 STARS

12.7.2 EMERGING LEADERS

12.7.3 PERVASIVE PLAYERS

12.7.4 PARTICIPANTS

12.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023

12.7.5.1 Overall footprint

FIGURE 69 STRUCTURAL HEALTH MONITORING MARKET: OVERALL FOOTPRINT

12.7.5.2 Offering footprint

TABLE 139 STRUCTURAL HEALTH MONITORING MARKET: OFFERING FOOTPRINT

12.7.5.3 Technology footprint

TABLE 140 STRUCTURAL HEALTH MONITORING MARKET: TECHNOLOGY FOOTPRINT

12.7.5.4 Vertical footprint

TABLE 141 STRUCTURAL HEALTH MONITORING MARKET: VERTICAL FOOTPRINT

12.7.5.5 Region footprint

TABLE 142 STRUCTURAL HEALTH MONITORING MARKET: REGION FOOTPRINT**12.8 COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023****FIGURE 70 STRUCTURAL HEALTH MONITORING: COMPANY EVALUATION MATRIX (START-UPS/SMES), 2023**

12.8.1 PROGRESSIVE COMPANIES

12.8.2 RESPONSIVE COMPANIES

12.8.3 DYNAMIC COMPANIES

12.8.4 STARTING BLOCKS

12.8.5 COMPETITIVE BENCHMARKING: START-UPS/SMES, 2023

12.8.5.1 List of key start-ups/SMEs

TABLE 143 STRUCTURAL HEALTH MONITORING MARKET: LIST OF KEY START-UPS/SMES

12.8.5.2 Competitive benchmarking of key start-ups/SMEs

TABLE 144 STRUCTURAL HEALTH MONITORING MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES**12.9 COMPETITIVE SCENARIOS AND TRENDS**

12.9.1 PRODUCT LAUNCHES

TABLE 145 STRUCTURAL HEALTH MONITORING MARKET: PRODUCT LAUNCHES, MARCH 2020–DECEMBER 2023

12.9.2 DEALS

TABLE 146 STRUCTURAL HEALTH MONITORING MARKET: DEALS, MARCH 2020–DECEMBER 2023

12.9.3 OTHERS

TABLE 147 STRUCTURAL HEALTH MONITORING MARKET: OTHERS, MARCH 2020–DECEMBER 2023**13 COMPANY PROFILES**

(Business Overview, Products/Solutions/Services Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*

13.1 KEY PLAYERS

13.1.1 COWI A/S

TABLE 148 COWI A/S: COMPANY OVERVIEW

FIGURE 71 COWI A/S: COMPANY SNAPSHOT

TABLE 149 COWI A/S: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 150 COWI A/S: DEALS

TABLE 151 COWI A/S: OTHERS

13.1.2 CAMPBELL SCIENTIFIC, INC.

TABLE 152 CAMPBELL SCIENTIFIC, INC.: COMPANY OVERVIEW

TABLE 153 CAMPBELL SCIENTIFIC, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 154 CAMPBELL SCIENTIFIC, INC.: PRODUCT LAUNCHES

TABLE 155 CAMPBELL SCIENTIFIC, INC.: DEALS

13.1.3 GEOKON

TABLE 156 GEOKON: COMPANY OVERVIEW

TABLE 157 GEOKON: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 158 GEOKON: PRODUCT LAUNCHES

TABLE 159 GEOKON: DEALS

13.1.4 NOVA METRIX

TABLE 160 NOVA METRIX: COMPANY OVERVIEW

TABLE 161 NOVA METRIX: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 162 NOVA METRIX: PRODUCT LAUNCHES

13.1.5 SGS SA

TABLE 163 SGS SA: COMPANY OVERVIEW

FIGURE 72 SGS SA: COMPANY SNAPSHOT

TABLE 164 SGS SA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 165 SGS SA: DEALS

13.1.6 TRIMBLE INC.

TABLE 166 TRIMBLE INC.: COMPANY OVERVIEW

FIGURE 73 TRIMBLE INC.: COMPANY SNAPSHOT

TABLE 167 TRIMBLE INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 168 TRIMBLE INC.: PRODUCT LAUNCHES

TABLE 169 TRIMBLE INC.: DEALS

13.1.7 SIXENSE

TABLE 170 SIXENSE: COMPANY OVERVIEW

TABLE 171 SIXENSE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 172 SIXENSE: DEALS

TABLE 173 SIXENSE: OTHERS

13.1.8 STRUCTURAL MONITORING SYSTEMS PLC.

TABLE 174 STRUCTURAL MONITORING SYSTEMS PLC.: COMPANY OVERVIEW

FIGURE 74 STRUCTURAL MONITORING SYSTEMS PLC.: COMPANY SNAPSHOT

TABLE 175 STRUCTURAL MONITORING SYSTEMS PLC.:

PRODUCTS/SOLUTIONS/SERVICES OFFERED

13.1.9 ACELLENT TECHNOLOGIES, INC.

TABLE 176 ACELLENT TECHNOLOGIES, INC.: COMPANY OVERVIEW

TABLE 177 ACELLENT TECHNOLOGIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

13.1.10 DIGITEXX DATA SYSTEMS, INC.

TABLE 178 DIGITEXX DATA SYSTEMS, INC.: COMPANY OVERVIEW

TABLE 179 DIGITEXX DATA SYSTEMS, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

13.2 OTHER PLAYERS

13.2.1 FIRST SENSOR AG

13.2.2 BDI

13.2.3 SISGEO

13.2.4 RST INSTRUMENTS LTD.

13.2.5 AVT RELIABILITY

13.2.6 GEOMOTION SINGAPORE

13.2.7 STRAINSTALL (JAMES FISHER AND SONS PLC.)

13.2.8 HBK

13.2.9 KINEMATRICS

13.2.10 FEAC ENGINEERING P.C.

13.2.11 EFI GLOBAL, INC.

13.2.12 SENSURON

13.2.13 INFIBRA TECHNOLOGIES

13.2.14 SODIS LAB

13.2.15 SET POINT TECHNOLOGIES

13.2.16 MISTRAS GROUP

13.2.17 METIS DESIGN CORPORATION

13.2.18 GEOSIG LTD.

*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

14 APPENDIX

14.1 INSIGHTS FROM INDUSTRY EXPERTS

14.2 DISCUSSION GUIDE

14.3 KNOWLEDGESTORE: MARKETSDMARKETS' SUBSCRIPTION PORTAL

14.4 CUSTOMIZATION OPTIONS

14.5 RELATED REPORTS

14.6 AUTHOR DETAILS

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