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3D Mapping Modelling Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (3D Mapping and 3D Modeling), By Component (Software and Service), By Application (Projection Mapping, Texture Mapping, Maps and Navigation, Other), By Industry Vertical (Entertainment and Media, Automotive, Healthcare, Building and Construction, Defense, Transportation, and Others), By Region, By Competition, 2018-2028

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Abstracts

Global 3D Mapping Modelling Market was valued at USD 5.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12.19% through 2028.

The 3D Mapping and Modeling market refers to the dynamic and rapidly evolving industry centered around the creation, visualization, and utilization of three-dimensional representations of physical spaces and objects. This market encompasses a diverse range of applications across sectors such as urban planning, autonomous vehicles, entertainment, healthcare, and construction. Utilizing technologies like LiDAR, photogrammetry, and advanced software algorithms, 3D mapping enables the generation of highly detailed and accurate models, fostering improved decision-making, planning, and analysis.

Key drivers of the market include technological advancements, the rising demand for autonomous vehicles, applications in smart cities, integration into the entertainment and gaming industry, expansion in healthcare and life sciences, and its pivotal role in

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construction and architecture. However, challenges such as data privacy concerns and the need for interoperability and standardization pose significant considerations for stakeholders. Overall, the 3D Mapping and Modeling market reflects a transformative force, shaping how industries visualize, understand, and interact with the physical world through innovative spatial data technologies.

Key Market Drivers

Technological Advancements and Innovation

The global 3D mapping and modeling market is significantly influenced by rapid technological advancements and continuous innovation. As technology evolves, the capabilities of 3D mapping and modeling tools expand, providing more sophisticated and efficient solutions for a wide range of applications. This driver plays a pivotal role in shaping the market landscape.

One key technological advancement is the integration of artificial intelligence (AI) and machine learning (ML) algorithms into 3D mapping software. These technologies enhance the accuracy and speed of data processing, allowing for more complex and detailed 3D models. Additionally, the incorporation of advanced sensors, such as LiDAR (Light Detection and Ranging), enables high-precision mapping, particularly in industries like urban planning, autonomous vehicles, and environmental monitoring.

Moreover, continuous innovation in hardware, such as improved graphics processing units (GPUs) and sensors, contributes to the development of more powerful and efficient 3D mapping solutions. This creates a positive feedback loop, as advancements in hardware drive the creation of more sophisticated software, further expanding the capabilities of 3D mapping and modeling technologies.

As businesses across various sectors increasingly recognize the value of 3D mapping for decision-making and planning, the demand for cutting-edge technologies in this domain continues to rise. This technological driver not only fuels market growth but also fosters competition among industry players to stay at the forefront of innovation.

Rising Demand for 3D Mapping in Autonomous Vehicles

The global surge in demand for autonomous vehicles is a significant driver propelling the growth of the 3D mapping and modeling market. As the automotive industry shifts towards self-driving technologies, the need for highly accurate and real-time 3D maps

becomes paramount for ensuring the safety and efficiency of autonomous vehicles.

3D mapping plays a crucial role in providing detailed and up-to-date information about the surrounding environment, enabling autonomous vehicles to navigate complex urban landscapes, recognize obstacles, and make informed decisions. This demand is not limited to passenger cars but extends to a variety of autonomous vehicles, including drones and delivery robots.

The increasing investments by automotive companies and technology giants in autonomous vehicle development contribute to the expansion of the 3D mapping and modeling market. These investments focus on enhancing mapping technologies, sensor systems, and AI algorithms to create comprehensive and reliable 3D models that can meet the stringent requirements of autonomous navigation.

Additionally, regulatory bodies and safety standards are likely to mandate the use of advanced 3D mapping technologies in autonomous vehicles, further boosting market growth. As the autonomous vehicle market continues to mature, the 3D mapping and modeling market will ride the wave of this transformative trend.

Growing Applications in Urban Planning and Smart Cities

The evolution of urban landscapes and the concept of smart cities are driving the adoption of 3D mapping and modeling in urban planning. Cities worldwide are increasingly leveraging these technologies to create digital twins, virtual replicas of the physical environment, to optimize urban infrastructure, transportation systems, and public services.

3D mapping facilitates comprehensive urban modeling, allowing city planners to visualize and analyze various scenarios before implementing changes. This includes the simulation of infrastructure projects, the impact of new constructions on the existing environment, and the optimization of traffic flow. The ability to create accurate digital twins enhances decision-making processes, reduces risks, and improves overall urban efficiency.

Smart cities, which integrate advanced technologies to enhance the quality of life for residents, heavily rely on 3D mapping for real-time monitoring and management. From traffic management and energy efficiency to public safety and disaster response, 3D mapping contributes to the development of intelligent and sustainable urban environments.

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As more cities embark on the journey of becoming smart and sustainable, the demand for 3D mapping and modeling solutions in urban planning will continue to grow. This driver underscores the crucial role of 3D mapping technologies in shaping the future of urban development.

Increasing Adoption in Entertainment and Gaming Industry

The entertainment and gaming industry is a key driver of the global 3D mapping and modeling market, with an escalating demand for realistic and immersive experiences. The integration of 3D mapping technologies in gaming, virtual reality (VR), and augmented reality (AR) applications has become a game-changer, enhancing the visual and interactive aspects of digital content.

In the gaming sector, 3D mapping allows developers to create highly detailed and dynamic virtual worlds. This not only improves the realism of the gaming environment but also enhances user engagement by providing a more immersive experience. As the demand for high-quality gaming experiences continues to rise, so does the need for advanced 3D mapping and modeling technologies.

In the realm of entertainment, 3D mapping is utilized in the production of visual effects for movies, television, and live events. The ability to map and model complex scenes in three dimensions enables the creation of stunning visual effects, realistic animations, and interactive displays. This application extends to virtual concerts, theme park attractions, and other entertainment experiences that leverage 3D mapping to captivate audiences.

As the entertainment and gaming industry embraces emerging technologies, the demand for sophisticated 3D mapping solutions is expected to soar. This driver not only fuels market growth but also highlights the diverse range of applications for 3D mapping beyond traditional industries.

Expansion of 3D Mapping in Healthcare and Life Sciences

The healthcare and life sciences sector is witnessing a rapid expansion of 3D mapping and modeling applications, driving innovation in medical imaging, surgical planning, and drug discovery. These technologies are revolutionizing the way medical professionals visualize and interact with anatomical structures, leading to improved diagnostics and treatment outcomes.

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One significant application is in medical imaging, where 3D mapping enhances the accuracy and depth of diagnostic information. From detailed organ reconstructions to the visualization of complex medical conditions, 3D mapping provides healthcare professionals with valuable insights for diagnosis and treatment planning.

In surgical planning, 3D mapping allows surgeons to create personalized models of patients' anatomy, enabling precise preoperative analysis and simulations. This contributes to better surgical outcomes, reduced complications, and enhanced patient safety.

Furthermore, the pharmaceutical and biotechnology industries are leveraging 3D mapping in drug discovery and development. By creating detailed 3D models of molecular structures, researchers can better understand the interactions between drugs and biological targets, leading to the identification of potential drug candidates more efficiently.

As the healthcare industry continues to embrace digital transformation, the demand for 3D mapping and modeling solutions in healthcare and life sciences is expected to grow. This driver underscores the significant impact of 3D mapping technologies on advancing medical research and patient care.

Integration of 3D Mapping in Construction and Architecture

The construction and architecture industries are experiencing a transformative shift with the widespread adoption of 3D mapping and modeling technologies. These tools are revolutionizing the way buildings and infrastructure projects are designed, planned, and executed, leading to increased efficiency, cost savings, and improved collaboration among stakeholders.

One key application is in Building Information Modeling (BIM), where 3D mapping allows architects, engineers, and construction professionals to create detailed digital representations of structures. BIM enables comprehensive project visualization, clash detection, and simulation of construction processes before breaking ground. This proactive approach reduces errors, enhances project timelines, and optimizes resource allocation.

Construction site monitoring is another critical use case, where 3D mapping technologies, including drones equipped with LiDAR sensors, provide real-time data on

project progress, material stockpiles, and site safety. This level of detailed monitoring improves project management, reduces risks, and ensures that construction projects stay on schedule

Government Policies are Likely to Propel the Market

Regulatory Framework for Geospatial Data Governance

Governments play a pivotal role in shaping the landscape of the global 3D mapping and modeling market through the formulation of regulatory frameworks that govern geospatial data. Geospatial data is at the core of 3D mapping technologies, providing the foundation for creating accurate and detailed three-dimensional representations of the physical world.

A comprehensive regulatory framework establishes guidelines for the collection, storage, and sharing of geospatial data. Governments may mandate standards for data accuracy, interoperability, and security to ensure the reliability and consistency of 3D mapping information. Additionally, these policies often address issues related to privacy, intellectual property, and data ownership, striking a balance between fostering innovation and protecting individual rights.

By establishing a clear regulatory framework for geospatial data governance, governments contribute to the development of a robust and trustworthy 3D mapping ecosystem. This enables businesses, research institutions, and other stakeholders to confidently invest in and utilize 3D mapping technologies, knowing that the data underpinning these systems is governed by transparent and well-defined policies.

Investment Incentives for Research and Development in 3D Mapping Technologies

To foster innovation and technological advancement in the 3D mapping and modeling market, governments can implement policies that provide incentives for research and development (R&D) activities. These incentives may include tax credits, grants, or subsidies for businesses and research institutions engaged in the development of cutting-edge 3D mapping technologies.

Investment incentives for R&D serve as a catalyst for the creation of new solutions, algorithms, and hardware that push the boundaries of 3D mapping capabilities. This proactive approach by governments encourages private sector investment in innovation, leading to the emergence of novel applications and increased competitiveness within

the global market.

Furthermore, these policies can have broader economic implications by creating jobs, attracting talent, and positioning a country as a hub for 3D mapping innovation. By aligning economic incentives with technological advancement, governments can stimulate growth in the 3D mapping sector and position their countries at the forefront of this dynamic and evolving industry.

Standards and Certification for 3D Mapping Technologies

The establishment of standards and certification processes for 3D mapping technologies is crucial in ensuring interoperability, quality, and reliability across the industry. Governments can play a central role in defining and enforcing these standards to create a level playing field for businesses, encourage collaboration, and facilitate the seamless integration of diverse 3D mapping solutions.

Standards may cover various aspects of 3D mapping, including data formats, interoperability protocols, and accuracy requirements. Certification processes, on the other hand, verify that products and services meet these established standards, providing a quality assurance mechanism for users and buyers in the market.

By implementing and enforcing standards and certification policies, governments contribute to the establishment of a mature and cohesive 3D mapping ecosystem. This not only benefits businesses by reducing compatibility issues but also instills confidence in end-users, promoting wider adoption of 3D mapping technologies across different sectors.

Infrastructure Development for Geospatial Data Collection

Governments can drive the growth of the 3D mapping and modeling market by investing in the development of infrastructure for geospatial data collection. This includes supporting the deployment of advanced sensor networks, satellite systems, and other data acquisition technologies that contribute to the generation of high-quality geospatial data.

Infrastructure development policies may involve collaborations between government agencies, private sector entities, and research institutions to build and maintain a robust geospatial data infrastructure. This can lead to the creation of comprehensive datasets that serve as the foundation for 3D mapping applications in areas such as urban

planning, disaster management, and environmental monitoring.

Moreover, governments can incentivize private sector participation in infrastructure development through public-private partnerships, grants, or subsidies. By creating a conducive environment for data collection infrastructure, governments contribute to the availability of accurate and up-to-date geospatial data, fostering innovation and growth in the 3D mapping market.

Education and Skill Development Initiatives

To ensure the sustainable growth of the 3D mapping and modeling market, governments can implement policies focused on education and skill development. These initiatives aim to address the growing demand for skilled professionals in geospatial technologies, data analysis, and 3D modeling.

Policies in this category may include the development of educational programs, vocational training, and research grants that specifically target the needs of the 3D mapping industry. Governments can collaborate with academic institutions, industry associations, and private sector entities to design curricula that align with the evolving requirements of the 3D mapping market.

By investing in education and skill development, governments contribute to the creation of a qualified workforce capable of driving innovation and competitiveness in the 3D mapping sector. This, in turn, attracts more businesses to operate within a region, fostering a thriving ecosystem of research, development, and application of 3D mapping technologies.

International Collaboration and Data Sharing Agreements

Given the inherently global nature of geospatial data and 3D mapping technologies, governments can formulate policies that promote international collaboration and data sharing. These agreements facilitate the exchange of geospatial data across borders, allowing for more comprehensive and accurate 3D mapping on a global scale.

International collaboration policies may involve the establishment of frameworks for data sharing, joint research projects, and the harmonization of standards to ensure seamless interoperability between different countries' 3D mapping systems. By fostering a spirit of collaboration, governments contribute to addressing global challenges such as climate change, disaster response, and urban planning with the support of accurate and shared

geospatial data.

Moreover, these policies can enhance diplomatic and economic ties between nations, creating opportunities for businesses to access diverse markets and collaborate with international partners. The promotion of open data sharing contributes to the development of a connected and interoperable global 3D mapping ecosystem, benefitting industries, governments, and society at large.

Key Market Challenges

Data Privacy and Security Concerns in 3D Mapping

One of the prominent challenges facing the global 3D mapping and modeling market revolves around data privacy and security concerns. As 3D mapping technologies become increasingly integral to various industries, the massive amounts of geospatial data collected raise significant issues regarding the protection of sensitive information and individuals' privacy.

Geospatial data often includes detailed information about the physical environment, infrastructure, and even personal spaces. In urban planning, for example, 3D mapping can capture intricate details of buildings, streets, and public spaces. In the context of autonomous vehicles, 3D mapping involves creating detailed maps of roadways and surrounding areas, potentially exposing sensitive information about private properties and residences.

The challenge is twofold. First, ensuring the secure storage and transmission of geospatial data to prevent unauthorized access or data breaches. Second, balancing the benefits of 3D mapping with the protection of individual privacy. Striking the right balance between innovation and safeguarding privacy is a delicate task that requires careful consideration of regulatory frameworks and industry standards.

Governments and regulatory bodies must play a crucial role in addressing these concerns by implementing robust policies that dictate how geospatial data is collected, stored, and shared. Clear guidelines on data anonymization, encryption, and access control are essential components of mitigating data privacy and security risks. Additionally, industry players need to invest in advanced cybersecurity measures and adopt best practices to ensure the integrity of the 3D mapping data throughout its lifecycle.

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The challenge extends to building public trust. As 3D mapping technologies become more pervasive, there is a need for transparency in how data is collected and used. Educating the public about the measures in place to protect their privacy and implementing mechanisms for obtaining informed consent are critical steps in addressing this challenge. Failure to effectively manage data privacy and security concerns could lead to regulatory roadblocks, public backlash, and hinder the widespread adoption of 3D mapping technologies across industries.

Interoperability and Standardization Across Diverse Platforms

Interoperability and standardization present significant challenges for the global 3D mapping and modeling market. The industry encompasses a multitude of platforms, technologies, and applications, each with its own set of specifications and data formats. Achieving seamless integration and collaboration between these diverse elements is a complex task that hinders the full potential of 3D mapping across sectors.

The lack of standardized data formats and interoperability protocols creates barriers for the exchange and utilization of 3D mapping data across different systems. For example, a 3D map generated for urban planning may not seamlessly integrate with a mapping system used for autonomous vehicle navigation due to differences in data structures or encoding standards. This lack of interoperability limits the efficiency and effectiveness of 3D mapping applications, reducing their impact on decision-making processes.

Standardization efforts face challenges due to the rapid evolution of 3D mapping technologies and the diverse range of stakeholders involved, including hardware manufacturers, software developers, and end-users in various industries. Coordinating and establishing common standards that cater to the needs of different applications while accommodating technological advancements is a complex undertaking.

Additionally, the absence of widely accepted standards can lead to vendor lock-in, where organizations become reliant on specific platforms or providers that support proprietary formats. This lack of flexibility can impede innovation and limit the options available to businesses seeking to adopt or upgrade their 3D mapping solutions.

Addressing the challenge of interoperability and standardization requires collaborative efforts among industry stakeholders, government bodies, and standardization organizations. Establishing open and widely adopted standards for data formats, communication protocols, and application interfaces is essential to creating a more cohesive and interoperable 3D mapping ecosystem. Governments can play a role in

incentivizing the adoption of standardized practices through regulatory frameworks and industry incentives, fostering an environment where 3D mapping technologies can seamlessly integrate across diverse platforms and applications.

Segmental Insights

Type Insights

The 3D Mapping segment held the largest Market share in 2022. 3D mapping is essential for the development and operation of autonomous vehicles. Accurate and real-time 3D maps enable these vehicles to navigate complex environments with precision, identifying obstacles and determining optimal routes. As the automotive industry increasingly focuses on autonomous driving technologies, the demand for high-quality 3D mapping solutions has surged, driving the dominance of 3D mapping in the market.

The global trend toward smart city initiatives relies heavily on 3D mapping for comprehensive urban planning and development. Municipalities and city planners leverage 3D mapping to model existing infrastructure, simulate future changes, and optimize city layouts. The ability to create detailed digital twins of urban environments supports data-driven decision-making in areas such as transportation, infrastructure development, and public services, solidifying the dominance of 3D mapping in smart city applications.

In sectors like environmental monitoring and disaster management, 3D mapping plays a crucial role in creating accurate models of landscapes and ecosystems. This technology aids in monitoring changes over time, assessing environmental impact, and facilitating disaster response planning. The precision offered by 3D mapping in these critical applications positions it as the preferred choice for organizations and government agencies involved in environmental stewardship and disaster preparedness.

The agricultural industry benefits significantly from 3D mapping, especially in precision agriculture. Farmers use 3D mapping to analyze topography, assess soil health, and optimize crop planning. This application helps in maximizing crop yields, minimizing resource use, and implementing precision farming techniques. The agricultural sector's reliance on precision and data-driven decision-making has propelled the dominance of 3D mapping in this domain.

Continuous advancements in sensor technologies, such as LiDAR and advanced imaging systems, enhance the accuracy and efficiency of 3D mapping. The integration

of artificial intelligence and machine learning algorithms further refines the mapping process, allowing for real-time data analysis and dynamic modeling. These technological advancements position 3D mapping as a sophisticated and reliable solution, further solidifying its dominance in the market.

The increasing need for global connectivity and collaboration has driven the demand for standardized and interoperable 3D mapping solutions. Industries that operate on a global scale, such as logistics and transportation, benefit from a unified approach to mapping. 3D mapping's dominance is amplified by its ability to provide a standardized and collaborative platform for diverse applications across different regions.

Application Insights

The Maps and Navigation segment held the largest Market share in 2022. Crucial for Navigation: The rise of autonomous vehicles has significantly contributed to the dominance of Maps and Navigation in the 3D Mapping and Modeling market. Accurate 3D maps are indispensable for autonomous vehicles to navigate and make informed decisions. The precise mapping of roads, infrastructure, and real-time updates is essential for ensuring safe and efficient autonomous transportation.

Urban Planning and Management: Smart city initiatives globally heavily rely on 3D mapping for comprehensive urban planning and management. Maps and Navigation applications provide city planners with detailed spatial data for optimizing traffic flow, managing infrastructure, and enhancing overall urban efficiency. This extends to applications like parking management, traffic monitoring, and emergency response systems.

Efficient Routing and Optimization: In the logistics and transportation sectors, accurate 3D mapping is essential for efficient route planning, optimization of delivery networks, and real-time tracking of shipments. Delivery services, supply chain management, and transportation companies benefit from the precision and reliability of Maps and Navigation applications, ensuring timely and optimized operations.

Widespread Adoption: Consumer navigation applications, such as those used for driving directions or location-based services, are among the most widely adopted uses of 3D mapping. These applications leverage Maps and Navigation to provide users with accurate and detailed maps, turn-by-turn directions, and location-based information. The ubiquity of these consumer-facing applications contributes to the overall dominance of Maps and Navigation.

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Integration with Emerging Technologies: The integration of 3D mapping with emerging technologies like augmented reality (AR) and virtual reality (VR) further enhances its dominance. In-car navigation systems, AR navigation overlays, and VR-based urban planning simulations all rely on 3D mapping to provide users with immersive and interactive experiences.

Regulatory Push: Government regulations and initiatives, especially in the context of autonomous vehicles and smart city development, often mandate the use of high-precision 3D mapping. This regulatory push reinforces the importance of Maps and Navigation applications, as compliance becomes a key factor in the adoption of these technologies.

Critical for Decision-Making: Maps and Navigation applications require real-time updates and high data accuracy, especially in dynamic environments. The need for up-to-date information on road conditions, traffic patterns, and infrastructure changes positions Maps and Navigation as a critical application in the 3D Mapping and Modeling market.

Regional Insights

North America:

North America commands a substantial share of the global 3D Mapping and Modeling market, driven by widespread adoption across industries such as automotive, construction, and urban planning. The presence of major technology hubs and leading market players contributes to continuous innovation and the development of advanced 3D mapping technologies. Increased investments in autonomous vehicles and smart city initiatives further propel market growth in this region. Additionally, stringent regulatory frameworks and standards for geospatial data governance play a crucial role in shaping the market landscape.

Europe:

Europe is a significant player in the 3D mapping market, characterized by robust infrastructure development and a strong emphasis on sustainable urban planning. The automotive sector, particularly in Germany, drives the demand for 3D mapping technologies for autonomous vehicle applications. The European market benefits from collaborative research initiatives and partnerships between government bodies,

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academia, and industry players. Standardization efforts and the focus on interoperability contribute to a cohesive 3D mapping ecosystem. Moreover, the region's commitment to environmental sustainability fosters applications in energy-efficient urban development and environmental monitoring.

Asia-Pacific:

The Asia-Pacific region is witnessing rapid growth in the 3D mapping market, propelled by increased urbanization, infrastructure development, and a burgeoning automotive industry. Countries like China and Japan are at the forefront of adopting 3D mapping for smart city projects and autonomous vehicle development. The construction sector in emerging economies contributes to the demand for 3D mapping in architectural planning and project visualization. Government initiatives supporting digital transformation and technological innovation further fuel market expansion. However, varying regulatory landscapes across countries present both opportunities and challenges for market players operating in the Asia-Pacific region.

Key Market Players

Autodesk Inc.

Bentley Systems, Incorporated

Hexagon AB

Trimble Inc.

Dassault Syst?mes

Siemens AG

PTC

AVEVA Group Plc

Esri

Topcon Corp.

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Report Scope:

In this report, the Global 3D Mapping Modelling Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

3D Mapping Modelling Market, By Type:

3D Mapping

3D Modeling

3D Mapping Modelling Market, By Component:

Software

Service

3D Mapping Modelling Market, By Application:

Projection Mapping

Texture Mapping

Maps and Navigation

Other

3D Mapping Modelling Market, By Industry Vertical:

Entertainment and Media

Automotive

Healthcare

Building and Construction

Defense, Transportation

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Others

3D Mapping Modelling Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

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Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global 3D Mapping Modelling Market.

Available Customizations:

Global 3D Mapping Modelling Market report with the given Market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional Market players (up to five).

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