

# **Global NVH Testing Market by Type (Hardware, Software), By Application (Impact Hammer Testing and Powertrain NVH Testing, Sound Intensity Measurement and Sound Quality Testing, Product Vibration Testing, Environmental Noise Measurement, Pass-by Noise Testing, Mechanical Vibration Testing, Noise Source Mapping, Building Acoustics), By End User (Automotive & Transportation, Aerospace & Defense, Power & Energy, Consumer Applications, Construction, Industrial, Other), By Region, Competition, 2018-2028**

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## **Abstracts**

The projected market size for the global NVH Testing market is expected to reach USD 2.36 billion by the end of 2022, with a compound annual growth rate (CAGR) of 6.62% during the forecast period. The global NVH (Noise, Vibration, and Harshness) testing market is a pivotal segment in the testing and measurement industry, encompassing the assessment and management of noise and vibration levels in diverse products and systems. From automotive and aerospace to consumer electronics and industrial machinery, NVH testing ensures product quality, regulatory compliance, and user satisfaction. This market's significance is driven by industries' pursuit of enhanced user experiences and refined product designs. Advanced technologies like microphones, accelerometers, and data analysis software empower engineers to capture and interpret noise and vibration data, guiding design improvements. As innovation accelerates across industries, the NVH testing market remains essential for maintaining optimal product performance, safety, and comfort in an increasingly interconnected and quality-

conscious global market.

## Key Market Drivers

### Regulatory Compliance and Quality Assurance

One of the foremost drivers propelling the global NVH testing market is the stringent regulatory landscape across industries. Regulatory bodies around the world have established strict noise and vibration standards for various products, from automobiles and aerospace equipment to consumer electronics and industrial machinery. Adhering to these regulations is not only a legal requirement but also crucial for maintaining product quality and ensuring user safety and satisfaction. As a result, manufacturers are compelled to integrate comprehensive NVH testing into their product development processes. The need to demonstrate compliance with regulatory standards drives the demand for advanced NVH testing solutions that can accurately measure, analyze, and mitigate noise and vibration levels, fostering a safer and more environmentally conscious product ecosystem.

### Increasing Consumer Expectations for Product Comfort

Consumer expectations for product comfort and refinement are rising across industries. Consumers today demand quieter, smoother, and more comfortable experiences from the products they use, whether it's a vehicle, a household appliance, or a piece of industrial equipment. Manufacturers are acutely aware that noise and vibration discomfort can negatively impact user perceptions and brand loyalty. To address these expectations, companies are investing in NVH testing to identify and eliminate sources of noise and vibration that can compromise user comfort. This driver has particularly gained momentum in sectors like automotive and consumer electronics, where the quality of the user experience directly correlates with market success.

### Advancements in Testing Technologies and Simulation Tools

The continuous advancements in testing technologies and simulation tools are acting as significant drivers for the NVH testing market's growth. Innovations in sensors, data acquisition systems, and software solutions have empowered engineers to capture, analyze, and interpret noise and vibration data with unparalleled accuracy and efficiency. Furthermore, simulation tools allow manufacturers to predict and address potential NVH issues during the design phase, reducing development cycles and costs. The integration of artificial intelligence, machine learning, and digital twin concepts into

NVH testing processes is revolutionizing the way noise and vibration characteristics are assessed and optimized. This convergence of technology not only enhances testing capabilities but also accelerates the innovation of quieter and more refined products across industries.

### Rapid Growth of Electric and Hybrid Vehicles

The rapid growth of electric and hybrid vehicles is driving substantial demand for NVH testing solutions. Unlike traditional internal combustion engines, electric powertrains generate fewer mechanical noises, making previously subtle noises more perceptible to drivers and passengers. As automakers transition to electric and hybrid vehicles, they face unique NVH challenges, such as mitigating electromagnetic noise and addressing new vibration patterns. NVH testing is instrumental in ensuring that these vehicles maintain the desired level of comfort and performance. As governments worldwide incentivize and enforce the adoption of electric and hybrid vehicles to combat environmental concerns, the demand for precise and comprehensive NVH testing becomes increasingly critical for delivering silent and enjoyable driving experiences.

### Key Market Challenges

#### Complexity of Multi-Physics Analysis

One of the significant challenges facing the global NVH testing market is the complexity of conducting multi-physics analysis. Modern products and systems often exhibit intricate interactions between various physical phenomena, such as structural dynamics, fluid dynamics, thermal effects, and electromagnetics. These interdependencies contribute to the overall noise and vibration characteristics of a product. However, accurately simulating and analyzing these multi-physics interactions presents a formidable challenge. Integrating multiple simulation tools and models to capture these diverse effects requires a high level of expertise and computational resources. Moreover, correlating simulation results with real-world test data can be intricate, making it essential to strike a balance between accuracy and computational efficiency. Overcoming this challenge demands the development of advanced simulation techniques and software platforms that can seamlessly integrate and analyze multi-physics interactions, enabling engineers to comprehensively assess the NVH behavior of complex systems.

#### Variability and Subjectivity in Human Perception

A significant hurdle in the global NVH testing market lies in the variability and subjectivity of human perception of noise and vibration. While advanced sensors and measurement tools can provide precise data, human responses to noise and vibration are highly subjective and influenced by factors such as individual sensitivity, cultural differences, and personal preferences. This subjectivity complicates the process of defining acceptable noise and vibration levels for products across diverse markets and user demographics. Designing products to meet varying customer expectations becomes a challenging task, particularly in global markets where preferences can vary widely. The challenge is to develop objective and standardized metrics for assessing noise and vibration comfort that align with human perception. Integrating psychoacoustic principles and human factors engineering into NVH testing methodologies can help bridge the gap between objective measurements and subjective human experiences, facilitating the creation of products that cater to a broader range of users while maintaining consistent quality.

## Key Market Trends

### Integration of Artificial Intelligence and Machine Learning

A prominent trend shaping the global NVH testing market is the integration of artificial intelligence (AI) and machine learning (ML) techniques into testing processes. The adoption of AI and ML enables NVH engineers to process and analyze vast amounts of noise and vibration data with unprecedented speed and accuracy. These technologies can identify patterns, correlations, and anomalies that might not be evident through traditional analysis methods. AI-driven algorithms can pinpoint specific sources of noise and vibration, allowing manufacturers to develop targeted mitigation strategies. Moreover, predictive modeling using AI and ML empowers engineers to forecast potential NVH issues early in the design phase, reducing the need for costly post-production fixes. As AI and ML continue to evolve, their application in NVH testing is poised to revolutionize the way noise and vibration characteristics are assessed, leading to more efficient and effective solutions.

### Emphasis on Virtual NVH Testing and Simulation

Virtual NVH testing and simulation have emerged as a transformative trend in the global NVH testing market. Traditional physical testing methods can be time-consuming and resource-intensive. In contrast, virtual testing leverages advanced computer simulations to predict noise and vibration characteristics during the design phase. This trend significantly reduces the need for extensive physical prototypes, thereby accelerating

product development cycles and reducing costs. Manufacturers can virtually experiment with various design iterations, material choices, and configurations to identify the most effective NVH solutions before a physical prototype is even produced. The convergence of simulation technologies, such as finite element analysis (FEA) and computational fluid dynamics (CFD), with NVH testing is ushering in a new era of efficiency and innovation in product development across industries.

### Focus on Green and Sustainable NVH Solutions

The growing emphasis on sustainability and environmental responsibility is driving a notable trend in the global NVH testing market—namely, the development of green and sustainable NVH solutions. As industries strive to reduce their carbon footprint and comply with stricter environmental regulations, NVH testing is being leveraged to create products that align with sustainability goals. This trend encompasses two primary aspects: noise reduction and energy efficiency. In sectors like automotive and transportation, NVH testing contributes to the design of quieter and more aerodynamic vehicles, thereby reducing noise pollution and improving fuel efficiency. Additionally, sustainable materials and innovative design strategies are being explored to minimize vibrations and noise generated by industrial machinery and consumer electronics. As eco-consciousness continues to influence consumer choices and industry practices, the integration of green and sustainable NVH solutions is expected to gain significant momentum, reshaping product development paradigms.

### Segmental Insights

#### Application Insights

Based on application, the impact hammer testing & powertrain NVH testing segment emerges as the predominant segment, exhibiting unwavering dominance projected throughout the forecast period. This segment's prominence is driven by its pivotal role in assessing and refining the noise, vibration, and harshness characteristics of powertrain systems. Impact hammer testing, a specialized technique within this segment, allows engineers to impart controlled forces to components and measure their response, aiding in the identification of resonance frequencies and structural weaknesses. Powertrain NVH testing, on the other hand, focuses on evaluating the acoustic and mechanical properties of vehicle powertrains, a critical aspect given the growing demand for quieter and more efficient automotive experiences. As industries prioritize enhanced user comfort and regulatory compliance, the impact hammer testing & powertrain NVH testing segment is set to maintain its dominant status, contributing to the development

of optimized powertrain systems that deliver refined and superior performance.

### End User Insights

Based on end user, the power & energy segment emerges as a formidable frontrunner, exerting its dominance and shaping the market's trajectory throughout the forecast period. This segment's dominance is attributed to its critical role in ensuring the reliability, efficiency, and safety of power generation, distribution, and energy-related equipment. Noise and vibration issues in power generation facilities, such as turbines and generators, can impact operational performance and pose potential safety risks. As the power and energy sector continues to evolve with the integration of renewable energy sources and advanced technologies, the demand for accurate NVH testing to assess and address noise and vibration challenges becomes paramount. The segment's dominance is set to endure as power and energy companies strive to enhance operational efficiency, meet regulatory standards, and deliver uninterrupted and sustainable energy solutions in a rapidly changing landscape.

### Regional Insights

North America firmly establishes itself as a commanding presence within the global NVH Testing market, affirming its preeminent position, and highlighting its pivotal role in shaping the industry's course. This prominence is fueled by a confluence of factors, including advanced research and development capabilities, a concentration of key market players, and a commitment to delivering cutting-edge solutions for noise, vibration, and harshness challenges. As industries across North America place an increasing emphasis on regulatory compliance, user comfort, and sustainable practices, the region's pivotal role in driving NVH testing innovation becomes all the more pronounced. North America's enduring influence resonates not only locally but reverberates globally, underscoring its critical role in steering the direction of NVH testing practices, standards, and technologies in an ever-evolving global landscape.

### Key Market Players

Br?el & Kj?r Sound & Vibration Measurement A/S

Dewesoft

Head Acoustics GmbH



imc Test & Measurement GmbH

National Instruments Corporation.

Siemens Industry Software Inc.

Prosig Limited

m+p international Mess- und Rechnertechnik GmbH.

### Report Scope:

In this report, the global NVH Testing market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Global NVH Testing Market, By Type:

Hardware

Software

#### Global NVH Testing Market, By Application:

Impact Hammer Testing & Powertrain NVH Testing

Sound Intensity Measurement & Sound Quality Testing

Product Vibration Testing

Environmental Noise Measurement

Pass-by Noise Testing

Mechanical Vibration Testing

Noise Source Mapping

Building Acoustics

Global NVH Testing Market, By End User:

Automotive & Transportation

Aerospace & Defense

Power & Energy

Consumer Applications

Construction

Industrial

Other

Global NVH Testing Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global NVH Testing Market.

Available Customizations:

Global NVH Testing market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization

*Global NVH Testing Market by Type (Hardware, Software), By Application (Impact Hammer Testing and Powertrain N...*



options are available for the report:

### Company Information

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

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