

# **Industrial Metrology Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Hardware, Software, Services), By Equipment (Coordinate Measuring Machine, Optical Digitizer & Scanner, Measuring Instrument, X-Ray & Computed Tomography, Automated Optical Inspection, 2D Equipment), By Application (Reverse Engineering, Quality Control & Inspection, Mapping & Modelling), By End User Industry (Aerospace & Defense, Automotive, Manufacturing, Semiconductor, Others), By Region, and By Competition, 2018-2028**

<https://marketpublishers.com/r/I8930FD0DBC8EN.html>

Date: November 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: I8930FD0DBC8EN

## **Abstracts**

The Global Industrial Metrology Market is a dynamic and vital sector that revolves around precision measurement, analysis, and inspection. This market caters to a wide range of industries, including automotive, aerospace, manufacturing, healthcare, and more, where precision and quality are paramount. Industrial metrology plays a crucial role in ensuring that manufactured components and products meet rigorous quality standards and adhere to precise design specifications.

The dominance of quality control and inspection within the market is evident, as industries rely on metrology for early defect detection, dimensional accuracy verification, and compliance with industry-specific regulations. Quality control processes not only prevent defects and costly rework but also optimize manufacturing processes, reduce waste, and enhance product quality. This segment's significance extends to customer satisfaction and brand reputation, as consistently delivering high-quality products is

essential.

Furthermore, the Industrial Metrology market's role in supply chain integration is indispensable, ensuring that incoming components meet required specifications before they become part of the manufacturing process. It also contributes to safety and liability management in safety-critical industries such as healthcare and aerospace, where non-compliance can have severe consequences.

Overall, the Global Industrial Metrology Market remains a linchpin for precision manufacturing, product excellence, and compliance across a diverse range of industries. The importance of quality control and inspection services within this market underscores the industry's commitment to delivering superior products, optimizing processes, and meeting the exacting demands of today's global marketplace. As technology and innovation continue to advance, the Industrial Metrology market will play an even more critical role in driving efficiency and maintaining quality standards.

## Key Market Drivers

### Increasing Focus on Quality Assurance and Precision in Manufacturing

One of the primary drivers in the global Industrial Metrology market is the relentless emphasis on quality assurance and precision in manufacturing. In an increasingly competitive global marketplace, manufacturers understand that product quality is a key differentiator. Customers demand products that meet or exceed industry standards, and compliance with international quality standards is often mandatory.

Industrial metrology plays a critical role in achieving and maintaining high-quality standards. It enables manufacturers to verify the accuracy and precision of their products through precise measurements, inspections, and dimensional analysis. In industries such as automotive, aerospace, medical devices, and electronics, even small deviations from specified tolerances can result in safety hazards or product failure. Metrology technologies help identify and rectify these issues, ensuring product reliability and customer satisfaction.

The drive for quality assurance is further fueled by the increasing complexity of manufactured components and the need for absolute precision. As products become more intricate, measuring and verifying their features accurately is a daunting challenge that can only be addressed through advanced metrology solutions.

## Expanding Use of Industrial Metrology in Industry 4.0 and Smart Manufacturing

The adoption of Industry 4.0 principles and the rise of smart manufacturing are driving the demand for industrial metrology solutions. Industry 4.0 represents the integration of digital technologies into the manufacturing process, including the Internet of Things (IoT), data analytics, and automation. As factories become more digitally connected and automated, metrology systems are evolving to provide real-time monitoring, quality control, and predictive maintenance.

Smart metrology solutions offer manufacturers the ability to collect, analyze, and act on data from the production floor. This data-driven approach enhances productivity, reduces waste, and optimizes manufacturing processes. Metrology systems integrated with the IoT can provide immediate feedback on the quality of components, allowing for corrective actions to be taken in real time.

Furthermore, smart metrology aligns with the broader goal of establishing adaptive and responsive production systems. The ability to monitor and adjust manufacturing processes as needed is crucial in meeting customer demands and staying competitive.

## Growing Demand for Non-Contact Metrology Techniques

The demand for non-contact metrology techniques is on the rise. These techniques, which include optical, laser-based, and 3D scanning methods, offer several advantages over traditional tactile measurement approaches. Non-contact metrology eliminates the risk of damaging delicate or sensitive components during measurement, making it essential in industries like electronics, medical devices, and aerospace.

Additionally, non-contact metrology enables the inspection and measurement of complex geometries that may be inaccessible using traditional methods. As industries increasingly rely on intricate and unconventional designs, the need for non-contact measurement solutions grows. These methods also excel in measuring soft materials, transparent objects, and difficult-to-reach surfaces.

Industries that require high-precision measurements, such as medical and semiconductor manufacturing, have been particularly quick to adopt non-contact metrology solutions. As technology advances, these techniques continue to offer improved accuracy and speed, making them attractive for a broader range of applications.

## Evolving Automotive and Aerospace Manufacturing

The automotive and aerospace industries, known for their stringent quality and safety standards, are significant drivers of the Industrial Metrology market. Both sectors have experienced transformative changes in recent years. In the automotive industry, the shift towards electric vehicles (EVs) and autonomous driving has led to the development of novel components and designs, demanding precise measurements and quality control. The aerospace industry has seen advancements in materials and design for fuel efficiency and safety.

As a result, automotive and aerospace manufacturers rely on metrology technologies to ensure the accuracy of complex components and verify the performance of innovative designs. This includes measuring critical parts like engine components, airframes, and safety-critical systems. The adoption of 3D scanning and other advanced metrology solutions in these industries is facilitating the verification of complex geometries and the optimization of aerodynamics.

## The Rise of Additive Manufacturing (3D Printing)

The rise of additive manufacturing, commonly known as 3D printing, is a significant driver of the Industrial Metrology market. Additive manufacturing processes involve layer-by-layer fabrication of components, enabling the production of complex and customized parts. However, ensuring the quality and accuracy of 3D-printed parts is a challenge due to the layering process.

Industrial metrology technologies, particularly 3D scanning and laser-based measurement methods, are crucial in verifying the dimensional accuracy and integrity of 3D-printed parts. These technologies are used in the quality control of prototypes, production parts, and molds for 3D printing. Additionally, metrology solutions play a role in reverse engineering processes, where physical objects are scanned and converted into digital models for further replication.

As industries across the spectrum continue to adopt additive manufacturing for its design freedom and rapid prototyping capabilities, the demand for metrology solutions in this context is poised to grow significantly.

## Key Market Challenges

### Rapid Technological Advancements and Adoption Challenges

One of the foremost challenges in the global Industrial Metrology market is the rapid pace of technological advancements. While technology innovation presents significant opportunities, it also poses adoption challenges for many manufacturers. Keeping up with the latest metrology solutions, software, and hardware requires substantial investment in equipment and training. Smaller manufacturers, in particular, may struggle to access and implement cutting-edge metrology technologies, potentially limiting their competitiveness in quality control and production efficiency.

The rate of technological change also leads to obsolescence concerns. Manufacturers may invest in metrology systems only to find them outdated within a few years. This necessitates constant reinvestment in newer equipment, adding financial pressures. Additionally, skilled labor is required to operate advanced metrology systems effectively, making the recruitment and retention of qualified personnel an ongoing challenge.

### Data Management and Analysis Complexities

Industrial metrology generates vast amounts of data, especially in three-dimensional (3D) measurements. Manufacturers often face challenges related to data management and analysis. Storing, processing, and interpreting large datasets can strain existing IT infrastructure. Ensuring data security and integrity becomes increasingly complex, especially for manufacturers handling sensitive or proprietary information. This is compounded by the need to integrate metrology data with other aspects of the manufacturing process, such as Computer-Aided Design (CAD) models and quality control databases.

Moreover, the insights gleaned from metrology data require skilled analysts who can draw actionable conclusions. This may necessitate additional investment in data analytics training and resources. Manufacturers must also establish effective protocols for data sharing and accessibility across teams, departments, and even supply chain partners.

### Global Supply Chain and Standardization Challenges

Many manufacturers operate within complex global supply chains, sourcing components and materials from various regions. A significant challenge in industrial metrology is ensuring consistency and accuracy in measurements across these diverse supply chains. Variations in equipment, techniques, and measurement standards can lead to discrepancies and quality control issues.

International standardization is an ongoing concern. Manufacturers may face hurdles in establishing consistent metrology practices and measurement standards, particularly when working with suppliers or partners from different regions. Regulatory disparities and trade barriers can complicate the process of aligning metrology standards.

### Cost-Effective Metrology Solutions

Industrial metrology equipment can be costly, particularly when considering advanced technologies like 3D scanning and non-contact measurement methods. Smaller manufacturers and startups often find it challenging to invest in high-end metrology solutions. Cost-effective options are essential to ensure a level playing field for all manufacturers, regardless of their size or financial resources.

Affordability also extends to the cost of training and upskilling personnel. Many businesses must invest in training programs to ensure that their teams can effectively operate and leverage metrology equipment. Reducing the total cost of ownership for metrology systems, including training and maintenance expenses, is an ongoing challenge for the industry.

### Quality Control in Additive Manufacturing and Complex Geometries

The rise of additive manufacturing, which includes 3D printing, introduces unique quality control challenges in the Industrial Metrology market. Traditional metrology techniques, designed for conventional manufacturing, may not be adequate for the intricate and complex geometries produced through additive manufacturing. Inspecting internal structures, layer-by-layer quality control, and ensuring the absence of defects within a printed component are complex tasks.

In addition to additive manufacturing, the trend toward miniaturization presents a challenge. Metrology solutions need to provide high precision, even for tiny components in industries like electronics and medical devices. The ability to accurately measure and verify extremely small parts adds complexity to metrology processes.

### Key Market Trends

#### Growing Emphasis on Industry 4.0 Integration and Smart Metrology

In the rapidly evolving landscape of manufacturing, Industry 4.0 principles have become

increasingly central. This trend is significantly impacting the field of industrial metrology. Manufacturers are adopting smart metrology solutions that integrate seamlessly with their digital factories. These systems leverage automation, data analytics, and IoT connectivity to enhance production efficiency, quality control, and predictive maintenance. Smart metrology enables real-time monitoring and feedback, reducing the likelihood of defects and optimizing production processes. Manufacturers are now incorporating this trend to create agile, data-driven, and responsive production lines.

### Expanding Application of 3D Metrology in Advanced Manufacturing

Three-dimensional (3D) metrology is experiencing a surge in demand across various industries. The adoption of 3D metrology systems is expanding due to their precision and versatility. These systems are utilized in the automotive sector for quality control, reverse engineering, and design verification. They are also crucial in aerospace for inspection and validation of complex components. Furthermore, 3D metrology is playing a critical role in medical device manufacturing, where precision is paramount. As technology continues to advance, the applications of 3D metrology are diversifying, making it an essential tool in advanced manufacturing processes.

### Rising Adoption of Portable Metrology Solutions

Portability is a key trend in industrial metrology. Traditional metrology systems were often large and stationary, limiting their use to specific areas in manufacturing facilities. However, portable metrology solutions are gaining traction. These devices are lightweight, compact, and easy to move, allowing manufacturers to perform measurements directly on the shop floor or at remote locations. They are particularly advantageous for in-field inspections, quality control, and dimensional analysis. The market for portable metrology is expanding as it provides cost-effective and flexible solutions to manufacturers aiming to streamline their measurement processes.

### Advancements in Optical Metrology Techniques

Optical metrology is undergoing a renaissance with significant advancements in techniques and technology. These techniques involve the use of light, lasers, and digital imaging for highly precise measurements. With innovations like white-light interferometry, structured light scanning, and optical coherence tomography, optical metrology has been instrumental in applications like surface analysis, dimensional measurements, and 3D scanning. The technology's non-contact nature is advantageous for sensitive and delicate components. Optical metrology is increasingly sought after in

industries such as electronics, semiconductor manufacturing, and medical device production due to its high precision and non-destructive capabilities.

### Demand for Coordinate Measuring Machines (CMM) with Multi-Sensor Capabilities

Coordinate Measuring Machines (CMM) are fundamental in industrial metrology, and they are witnessing a trend towards multi-sensor capabilities. Traditionally, CMMs relied on tactile probes for measurements. However, multi-sensor CMMs combine various measurement technologies, including tactile probes, laser scanners, and optical sensors. This versatility allows manufacturers to choose the most suitable method for a particular measurement task, improving flexibility and efficiency. Multi-sensor CMMs are crucial in quality control, reverse engineering, and dimensional inspection across multiple industries, including automotive, aerospace, and medical devices. The demand for these versatile CMMs is expected to continue to grow as industries seek more comprehensive measurement solutions.

### Segmental Insights

#### Equipment Insights

Coordinate measuring machine (CMM) segment dominates in the global industrial metrology market in 2022. CMMs are renowned for their exceptional precision and accuracy. These machines utilize advanced sensors and probing systems to measure intricate geometrical features, tolerances, and dimensions with minimal error. This precision is critical in industries where even the slightest deviation from design specifications can have a significant impact on product performance and safety.

CMMs are highly versatile and adaptable to various measurement tasks. They can be used to inspect a wide array of parts, from small, intricate components to large, complex structures. CMMs are capable of measuring 2D and 3D features, making them suitable for a diverse range of applications.

Many CMMs are equipped with automation features, such as robotic arms and CNC (Computer Numerical Control) systems. These automation capabilities allow for faster and more efficient measurement processes. Automated CMMs can run measurement routines with minimal human intervention, improving productivity and reducing the risk of human error.

CMMs are often integrated with software packages that provide powerful data analysis



and reporting tools. This enables users to quickly analyze measurement results, generate detailed reports, and make informed decisions based on the collected data. This feature is especially valuable in quality control and process optimization.

The automotive and aerospace industries, in particular, have embraced CMM technology. These sectors demand rigorous quality control and precision measurement to ensure the safety and reliability of their products. CMMs have become a standard tool in their manufacturing processes.

Regulatory authorities in many industries, such as healthcare, aerospace, and automotive, impose stringent quality and safety standards. CMMs are instrumental in ensuring compliance with these regulations. The high precision and traceability of CMM measurements make them essential for demonstrating adherence to quality and safety requirements.

### Type Insights

Services segment dominates in the global industrial metrology market in 2022. One of the primary reasons for the dominance of services is the need for tailored solutions. Metrology service providers offer consultation and customization services, working closely with clients to understand their specific measurement requirements and challenges. This involves designing measurement strategies and systems that precisely fit the unique needs of each industry and application.

After the design phase, the installation and commissioning of metrology equipment are crucial. Service providers are responsible for the physical installation of equipment, ensuring that it operates optimally and meets the specified accuracy requirements. Moreover, they offer training services to educate personnel on the proper use of metrology hardware and software, enhancing the efficiency and effectiveness of measurement processes.

The accuracy and reliability of metrology systems deteriorate over time due to wear and environmental factors. Metrology service providers offer calibration and maintenance services to ensure that measurement equipment consistently delivers accurate results. Routine calibration is vital to validate the reliability of measurement data, and maintenance prevents equipment downtime.

### Regional Insights

North America dominates the Global Industrial Metrology Market in 2022. North America has been a hub for technological innovation, particularly in industries such as aerospace, automotive, and manufacturing. The continuous pursuit of cutting-edge technologies and the development of high-precision metrology solutions have given North American companies a competitive advantage. They are at the forefront of adopting and promoting innovative metrology techniques, making them leaders in the field.

The United States, in particular, boasts a robust and diverse manufacturing sector. From automotive giants to aerospace manufacturers and medical device companies, North America's manufacturing base is vast and multifaceted. The need for precision measurement and quality control is intrinsic to these industries, driving the demand for advanced metrology solutions.

The North American aerospace and defense industries are among the world's largest and most advanced. These industries demand the highest levels of precision and quality control, and they rely heavily on metrology solutions for design, prototyping, and production. This drives continuous investment in state-of-the-art metrology equipment and technology.

The United States is home to major automotive manufacturers and suppliers, contributing significantly to the demand for industrial metrology solutions. Metrology plays a crucial role in ensuring the safety, performance, and efficiency of vehicles, which is paramount for automotive manufacturers.

North America houses a substantial portion of the global healthcare and medical device manufacturing industry. Quality control and regulatory compliance are non-negotiable in this sector, and metrology is instrumental in achieving these standards. Precision measurement is essential for the production of medical devices, implants, and instruments.

## Key Market Players

Hexagon AB

Renishaw PLC

FARO Technologies, Inc.

Carl Zeiss AG

Nikon Metrology

Creaform

KLA Corporation

Mitutoyo Corporation

Keyence Corporation

Applied Materials, Inc.

Report Scope:

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

Industrial Metrology Market, By Type:

Hardware

Software

Services

Industrial Metrology Market, By Equipment:

Coordinate Measuring Machine

Optical Digitizer & Scanner

Measuring Instrument

X-Ray & Computed Tomography

Automated Optical Inspection

2D Equipment

Industrial Metrology Market, By Application:

Reverse Engineering

Quality Control & Inspection

Mapping & Modelling

Industrial Metrology Market, By End User Industry:

Aerospace & Defense

Automotive

Manufacturing

Semiconductor

Others

Industrial Metrology Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Industrial Metrology Market.

### Available Customizations:

Global Industrial Metrology 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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