

# **Vietnam NVH Testing Market, By Type (Hardware, Software), By Application (Pass-By-Noise, Sound Power, Environmental Noise, Noise Mapping, Telecom Testing, Building Acoustics, Sound Quality, Product Vibration, Human Vibration, Others), By End User (Automotive & Transportation, Power Generation, Aerospace & Defence, Construction, Consumer Electronics, Mining & Metallurgy, Industrial Equipment, Others), By Region, Competition, Forecast & Opportunities, 2019-2029F**

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## **Abstracts**

Vietnam NVH Testing Market was valued at USD 83.4 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.7% through 2029F.

The NVH (Noise, Vibration, and Harshness) Testing market in Vietnam is witnessing robust growth driven by various factors such as the expansion of the automotive industry, regulatory compliance requirements, urbanization, technological advancements, and increasing awareness of noise pollution and its impacts on public health and well-being. Vietnam's automotive industry has experienced significant growth in recent years, fueled by rising consumer demand, economic development, and government support. As automotive manufacturers strive to deliver high-quality vehicles that meet customer expectations and regulatory standards, the demand for NVH testing services has surged. NVH testing plays a crucial role in assessing and optimizing the acoustic and vibration characteristics of vehicles, ensuring ride comfort, and reducing noise emissions.

Government regulations and standards related to noise emissions and environmental quality are driving the adoption of NVH testing solutions in Vietnam. Regulatory bodies impose strict requirements on industries such as automotive manufacturing, construction, and transportation to comply with noise limits and NVH performance standards. NVH testing helps companies demonstrate compliance with regulatory requirements, obtain necessary certifications, and mitigate noise pollution impacts.

Urbanization and infrastructure development are also contributing to the growth of the NVH Testing market in Vietnam. As cities expand and populations grow, there is an increasing need to assess and mitigate noise and vibration impacts from construction activities, transportation infrastructure, and industrial operations. NVH testing enables authorities and developers to evaluate noise levels, identify sources of noise pollution, and develop strategies to minimize adverse impacts on communities.

Technological advancements in NVH testing solutions are driving innovation and market growth in Vietnam. Manufacturers of NVH testing equipment and software are developing new tools and techniques to improve the accuracy, efficiency, and reliability of NVH testing processes. These advancements enable NVH testing providers to offer more sophisticated and cost-effective solutions to meet the evolving needs of clients across various industries.

## Key Market Drivers

### Automotive Industry Growth:

The rapid expansion of Vietnam's automotive industry is a significant driver in the NVH (Noise, Vibration, and Harshness) Testing market. With increasing consumer purchasing power and demand for automobiles, both domestic and international automotive manufacturers are investing in production facilities and expanding their presence in the country. As the automotive sector grows, there is a parallel demand for NVH testing services to ensure that vehicles meet quality standards and regulatory requirements. NVH testing plays a crucial role in assessing and optimizing the acoustic and vibration characteristics of vehicles, enhancing ride comfort, and reducing noise levels to meet customer expectations. As automotive companies strive to differentiate themselves in a competitive market, the importance of NVH testing in delivering high-quality, refined vehicles becomes increasingly evident, driving the demand for NVH testing solutions in Vietnam.

### Regulatory Compliance Requirements:

Government regulations and standards pertaining to noise emissions and environmental quality are another key driver in the Vietnam NVH Testing market. Regulatory bodies in Vietnam, as well as international agencies, impose strict requirements on vehicle manufacturers to comply with noise emission limits and NVH performance standards. These regulations aim to protect public health, reduce noise pollution, and ensure a safe and comfortable environment for residents. Automotive companies must conduct comprehensive NVH testing to demonstrate compliance with regulatory requirements and obtain necessary certifications for their vehicles. As regulatory scrutiny intensifies and environmental concerns grow, the demand for NVH testing services that enable compliance becomes increasingly critical, driving the growth of the NVH Testing market in Vietnam.

### Urbanization and Infrastructure Development:

The rapid urbanization and infrastructure development taking place in Vietnam contribute to the demand for NVH testing services, particularly in the construction and transportation sectors. As cities expand and populations grow, there is an increasing need to assess and mitigate noise and vibration impacts from construction activities, transportation infrastructure, and industrial operations. NVH testing helps identify sources of noise and vibration, evaluate their effects on surrounding communities, and develop strategies to minimize adverse impacts. With ongoing infrastructure projects such as road construction, railway development, and urban renewal initiatives, the demand for NVH testing solutions that support sustainable development and environmental protection continues to rise, driving market growth in Vietnam.

### Technological Advancements in NVH Testing Solutions:

Advancements in technology and innovation in NVH testing solutions are driving the growth of the market in Vietnam. Manufacturers of NVH testing equipment and software are continuously developing new tools and techniques to improve the accuracy, efficiency, and reliability of NVH testing processes. These advancements include the development of advanced sensors, data acquisition systems, noise mapping software, and simulation tools that enable more comprehensive and detailed analysis of noise and vibration characteristics. By leveraging cutting-edge technology, NVH testing providers can offer clients more sophisticated and cost-effective solutions to address their specific needs and challenges. As companies in Vietnam seek to stay competitive and meet evolving customer demands, the adoption of advanced NVH testing solutions

becomes increasingly important, driving market growth and innovation.

#### Increasing Awareness of Noise Pollution and Health Impacts:

Growing awareness of the adverse effects of noise pollution on public health and well-being is a significant driver in the Vietnam NVH Testing market. As people become more conscious of the impacts of noise on sleep quality, stress levels, and overall quality of life, there is a greater demand for measures to mitigate noise pollution and protect community health. NVH testing plays a crucial role in assessing noise levels, identifying sources of noise pollution, and developing strategies to reduce exposure and improve environmental quality. With increasing public awareness and advocacy for noise abatement measures, there is a heightened demand for NVH testing services that support sustainable urban development and enhance the livability of cities in Vietnam. As a result, NVH testing providers are poised to play a vital role in addressing these concerns and driving positive change in the built environment.

#### Key Market Challenges

##### Limited Infrastructure and Resources:

One of the primary challenges facing the Vietnam NVH (Noise, Vibration, and Harshness) Testing market is the limited infrastructure and resources available for conducting comprehensive NVH testing. While there is a growing demand for NVH testing services driven by factors such as urbanization, industrialization, and transportation development, Vietnam still lags behind in terms of the availability of specialized testing facilities, equipment, and skilled professionals. The lack of dedicated NVH testing laboratories and certified testing centers poses challenges for companies seeking to assess and mitigate noise and vibration issues in their products and operations. Additionally, the shortage of trained personnel with expertise in NVH testing techniques, data analysis, and interpretation further exacerbates the situation, hindering the quality and reliability of NVH testing outcomes. Addressing these infrastructure and resource limitations will require concerted efforts from government agencies, industry stakeholders, and educational institutions to invest in building capacity, upgrading facilities, and providing training programs to support the growing demand for NVH testing services in Vietnam.

##### Regulatory Compliance and Standards:

Another significant challenge in the Vietnam NVH Testing market is navigating the

complex regulatory landscape and compliance requirements related to noise, vibration, and environmental regulations. As Vietnam continues to industrialize and urbanize, there is increasing pressure to establish and enforce standards for noise emissions, workplace vibration exposure, and environmental noise levels. However, the regulatory framework for NVH testing in Vietnam is still evolving, with a lack of clear guidelines, standards, and enforcement mechanisms in place. This ambiguity creates uncertainty for companies operating in sectors such as automotive manufacturing, construction, and industrial production, making it challenging to ensure compliance with regulatory requirements and avoid potential penalties or legal liabilities. Moreover, the absence of harmonized international standards and benchmarks for NVH testing further complicates the situation, particularly for companies engaged in global trade and export-oriented industries. To address these challenges, policymakers need to collaborate with industry stakeholders to develop robust regulatory frameworks, standards, and enforcement mechanisms that align with international best practices and promote sustainable development while balancing economic growth with environmental protection.

#### Technological Complexity and Integration:

The rapid advancement of technology in areas such as automotive engineering, electronics, and telecommunications presents both opportunities and challenges for the Vietnam NVH Testing market. While technological innovations have enabled more sophisticated NVH testing methodologies, simulation tools, and data analysis techniques, they have also increased the complexity of testing procedures and equipment. Integrating diverse NVH testing solutions, sensors, and software platforms to assess noise and vibration levels across different applications and industries requires specialized knowledge and expertise. Moreover, the compatibility and interoperability of NVH testing systems with existing infrastructure, production processes, and supply chains pose technical challenges for companies seeking to adopt new technologies and upgrade their testing capabilities. Additionally, the cost of acquiring and maintaining advanced NVH testing equipment and software can be prohibitive for small and medium-sized enterprises (SMEs) in Vietnam, limiting their ability to compete effectively in the market. To overcome these technological challenges, companies need to invest in ongoing training and development programs for their workforce, collaborate with technology providers and research institutions, and adopt a phased approach to technology adoption and integration to ensure successful implementation and maximize return on investment.

#### Talent Acquisition and Retention:

The shortage of skilled professionals with expertise in NVH testing, acoustics, and vibration engineering poses a significant challenge for companies operating in the Vietnam NVH Testing market. Despite the growing demand for NVH testing services driven by factors such as urbanization, industrialization, and transportation development, there is a limited pool of qualified candidates with the necessary technical skills, knowledge, and experience in noise and vibration analysis, testing methodologies, and instrumentation. As a result, companies face difficulties in recruiting and retaining talented NVH engineers, technicians, and researchers, leading to delays in project timelines, increased labor costs, and diminished testing quality. Moreover, the brain drain phenomenon, where skilled professionals seek opportunities abroad for better career prospects and higher salaries, further exacerbates the talent shortage in the local NVH testing industry. To address this challenge, companies need to invest in training and development programs to upskill their existing workforce, collaborate with educational institutions to tailor curricula to meet industry needs, and implement talent retention strategies such as competitive compensation packages, career advancement opportunities, and a supportive work environment to attract and retain top talent in the Vietnam NVH Testing market.

#### Cost and Affordability:

Cost considerations present a significant challenge for companies seeking to conduct NVH testing in Vietnam, particularly for small and medium-sized enterprises (SMEs) with limited financial resources. The cost of acquiring, operating, and maintaining NVH testing equipment, software, and facilities can be substantial, making it prohibitive for some companies to invest in comprehensive testing programs. Additionally, the high cost of specialized NVH testing services offered by third-party providers further limits access to testing solutions for SMEs and startups in Vietnam. Moreover, the lack of economies of scale and volume discounts for NVH testing equipment and services exacerbates cost pressures for companies operating in niche industries or specialized applications. As a result, many companies may opt to forego NVH testing or cut corners to reduce costs, compromising the quality and accuracy of their testing outcomes and risking potential product failures or safety issues. To address the cost challenges associated with NVH testing in Vietnam, companies need to explore cost-effective testing solutions, such as outsourcing non-critical testing tasks, leveraging open-source software and free resources, and pooling resources through industry collaborations and consortiums to share costs and resources. Additionally, government incentives, subsidies, and financial assistance programs can help alleviate the financial burden for companies investing in NVH testing infrastructure and capabilities, making testing more



accessible and affordable for all stakeholders in the Vietnam NVH Testing market.

## Key Market Trends

### Automotive Industry Growth:

The automotive industry's growth serves as a primary driver in propelling the Vietnam NVH (Noise, Vibration, and Harshness) Testing market forward. Vietnam's automotive sector has been witnessing robust expansion, fueled by factors such as increasing consumer purchasing power, favorable government policies, and rising demand for passenger and commercial vehicles. As automotive manufacturers strive to enhance vehicle performance, comfort, and safety, the importance of NVH testing becomes paramount. NVH testing ensures that vehicles meet stringent quality standards, regulatory requirements, and customer expectations for noise levels, ride comfort, and overall driving experience. With the automotive industry continuing to expand and diversify in Vietnam, the demand for NVH testing services is expected to surge, driving market growth and innovation.

### Urbanization and Infrastructure Development:

Vietnam's rapid urbanization and infrastructure development present significant opportunities for the NVH Testing market. As urban areas expand and populations grow denser, concerns about noise pollution and vibration levels become increasingly prominent. Urbanization leads to the construction of roads, railways, airports, and buildings, all of which can contribute to noise and vibration emissions. NVH testing plays a crucial role in assessing and mitigating these environmental impacts, ensuring that infrastructure projects are planned and executed with consideration for noise and vibration control measures. With ongoing urbanization and infrastructure development projects across Vietnam, the demand for NVH testing services to support sustainable and livable urban environments is expected to rise steadily.

### Regulatory Compliance Requirements:

Government regulations and standards mandating NVH testing drive demand in the Vietnam market. Regulatory bodies in Vietnam impose strict requirements on noise emissions, vibration levels, and environmental noise management to protect public health, safety, and welfare. Automotive manufacturers, industrial facilities, construction projects, and urban development initiatives are required to conduct NVH testing to demonstrate compliance with regulatory requirements. Additionally, environmental

impact assessments (EIAs) often include NVH testing as a prerequisite for obtaining permits and approvals for development projects. The need to comply with regulatory mandates incentivizes businesses to invest in NVH testing services, contributing to market growth and sustainability.

#### Technological Advancements in Testing Solutions:

Technological advancements in NVH testing solutions drive innovation and competitiveness in the Vietnam market. The development of advanced measurement instruments, sensors, data acquisition systems, and simulation software enables more precise, efficient, and comprehensive NVH testing processes. These technological innovations enhance the accuracy, reliability, and scalability of NVH testing services, allowing businesses to address complex challenges and meet evolving customer demands. Furthermore, the integration of digital technologies such as artificial intelligence (AI), machine learning (ML), and predictive analytics into NVH testing solutions enables predictive maintenance, real-time monitoring, and data-driven decision-making, unlocking new opportunities for value creation and differentiation in the market.

#### Growing Awareness of Noise and Vibration Issues:

Increasing awareness of noise and vibration issues among consumers, businesses, and policymakers serves as a catalyst for market growth in Vietnam. As individuals become more attuned to the impacts of noise pollution on health, well-being, and quality of life, there is a growing demand for NVH testing services to address these concerns. Businesses are increasingly recognizing the importance of mitigating noise and vibration emissions to enhance employee productivity, customer satisfaction, and corporate reputation. Additionally, government initiatives aimed at promoting environmental sustainability and urban livability drive investments in NVH testing infrastructure and expertise. This growing awareness of noise and vibration issues creates opportunities for NVH testing providers to deliver value-added solutions and services that address the needs of diverse stakeholders in the Vietnam market.

#### Segmental Insights

##### Application Insights

Noise Mapping is the dominating segment in the Vietnam NVH Testing market in 2023. Vietnam is experiencing rapid urbanization and infrastructure development, particularly



in major cities such as Ho Chi Minh City and Hanoi. As urban areas expand and populations grow denser, concerns about noise pollution become increasingly significant. Noise mapping plays a crucial role in assessing and mitigating noise levels in urban environments, helping city planners, policymakers, and developers make informed decisions to create healthier and more livable cities.

With Vietnam's ongoing economic growth and urbanization, there is a corresponding increase in transportation infrastructure projects, including roads, railways, airports, and public transit systems. These infrastructure developments often result in increased noise emissions from vehicular traffic, construction activities, and industrial operations. Noise mapping allows authorities to evaluate the potential impact of transportation projects on surrounding communities and implement measures to minimize noise pollution.

Vietnam's industrial sector is expanding rapidly, with increasing investment from domestic and international companies in manufacturing, logistics, and construction. Industrial activities can contribute to noise emissions, particularly in areas with concentrations of factories, warehouses, and industrial zones. Noise mapping helps identify sources of industrial noise and assess their impact on nearby residents and sensitive receptors, facilitating the implementation of noise control measures and regulatory compliance.

Growing awareness of environmental issues and public health concerns has led to heightened scrutiny of noise pollution and its effects on human health and well-being. Excessive noise exposure can lead to sleep disturbances, stress, hearing loss, and other adverse health outcomes. Noise mapping enables authorities to evaluate noise levels in different environments, identify areas of concern, and develop strategies to protect public health and improve quality of life.

## Regional Insights

Southern Vietnam has emerged as a dominant region in the Vietnam NVH Testing market because Southern Vietnam, particularly cities like Ho Chi Minh City and Binh Duong Province, serves as a major industrial hub with a high concentration of automotive manufacturing plants, electronics factories, and other industries. The presence of these industries drives the demand for NVH testing services to ensure compliance with quality standards and regulations.

The southern region of Vietnam has experienced rapid industrialization and economic

growth in recent years. This growth has led to an increase in the production of vehicles, machinery, and consumer electronics, all of which require NVH testing to meet market demands and maintain competitiveness.

The Vietnamese government has made significant investments in infrastructure development in the southern region, including transportation networks and industrial parks. This infrastructure supports the efficient movement of goods and people, facilitating the growth of industries and the demand for NVH testing services.

Southern Vietnam benefits from a relatively large pool of skilled labor, including engineers and technicians trained in NVH testing and related fields. The availability of skilled professionals enables companies to establish NVH testing facilities and provide high-quality services to meet the needs of local industries.

### Key Market Players

Hottinger Br el & Kj r A/S

Siemens AG

Emerson Electric Co.

HEAD acoustics GmbH

imc Test & Measurement GmbH

m+p international Mess- und Rechnertechnik GmbH

Dewesoft d.o.o.

Prosig Ltd

GRAS Sound & Vibration

Signal.X Technologies LLC

### Report Scope:

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

Vietnam NVH Testing Market, By Type:

Hardware

Software

Vietnam NVH Testing Market, By Application:

Pass-By-Noise

Sound Power

Environmental Noise

Noise Mapping

Telecom Testing

Building Acoustics

Sound Quality

Product Vibration

Human Vibration

Others

Vietnam NVH Testing Market, By End User:

Automotive & Transportation

Power Generation

Aerospace & Defence

Construction

Consumer Electronics

Mining & Metallurgy

Industrial Equipment

Others

Vietnam NVH Testing Market, By Region:

Southern Vietnam

Northern Vietnam

Central Vietnam

Competitive Landscape

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

Available Customizations:

Vietnam NVH Testing 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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