

# **Europe Thermal Imaging Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Modules, Cameras, and Scopes), Application (LWIR, MWIR, and SWIR), Type (Handheld and Standstill), Technology (Cooled and Uncooled), and End-Use Industry (Automotive, Consumer, Industrial, Medical, Defense and Aerospace, and Others)**

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## **Abstracts**

The Europe Thermal Imaging Market is projected to grow significantly, reaching an estimated US\$ 2,434.4 million by 2031, up from US\$ 1,404.9 million in 2024, reflecting a compound annual growth rate (CAGR) of 8.2% from 2024 to 2031. This growth is largely driven by advancements in the automotive and manufacturing sectors, which are pivotal to the European economy.

The automotive industry is a major employer in Europe, providing jobs for approximately 13.8 million people, which constitutes about 6.1% of all jobs in the European Union (EU). Within this sector, around 2.6 million individuals are directly involved in motor vehicle manufacturing, representing 8.5% of all manufacturing jobs in the EU. The EU stands as one of the largest motor vehicle producers globally and is the leading private investor in research and development, as highlighted by the European Commission. The push towards digitization and green transportation is a key focus, with the European Commission prioritizing the automation of road transport. The initiative for cooperative, connected, and automated mobility (CCAM) aims to enhance road safety and equity while fostering competitiveness among European businesses. The Horizon Europe program allocates EUR 500 million in a public-private partnership for CCAM,

with an equal contribution from private sector members. As of 2021, EUR 159 million has been invested in research and innovation for 19 European projects aimed at advancing CCAM.

In 2022, the manufacturing sector employed around 30 million people and generated a value added of US\$ 2.3 trillion, making it the largest sector in the EU's business economy in terms of employment (18.7%) and value added (24.1%). The thermal imaging market is significantly influenced by developments in these sectors, as thermal imaging solutions are increasingly integrated into automotive and manufacturing processes.

The Europe Thermal Imaging Market is segmented by product type, application, type, technology, and end-use industry. In terms of product type, the market includes modules, cameras, and scopes, with cameras holding the largest market share in 2024. Applications are categorized into LWIR (Long-Wave Infrared), MWIR (Mid-Wave Infrared), and SWIR (Short-Wave Infrared), with LWIR leading the market. The market is also divided into handheld and standstill types, with handheld devices dominating. In terms of technology, cooled thermal imaging systems hold a larger share compared to uncooled systems. The end-use industries for thermal imaging include automotive, consumer, industrial, medical, defense and aerospace, among others, with the industrial sector being the largest contributor in 2024.

Thermal imaging technology has diverse applications, particularly in the medical field, where it offers non-invasive solutions for early disease detection. Medical thermal cameras are capable of accurately measuring skin temperature and producing detailed thermal images that reveal temperature variations, aiding in the identification of potential health issues such as inflammation or infections. The use of thermal imaging in healthcare is expanding, with applications ranging from monitoring body temperature to diagnosing various medical conditions. For instance, in April 2024, a collaboration between IDC and the National Physical Laboratory (NPL) led to the development of a highly accurate thermal imaging device for foot temperature mapping.

Moreover, the integration of artificial intelligence (AI) with thermal imaging is paving the way for innovative diagnostic methods. Research published in June 2024 indicated that combining facial thermal imaging with AI can effectively predict coronary artery disease, offering a non-invasive and real-time diagnostic approach that surpasses traditional methods.

Despite the promising growth of the thermal imaging market, challenges such as supply

chain disruptions pose risks to its expansion.

Geographically, the market is segmented into several countries, including Germany, the United Kingdom, France, Italy, and Russia, with Germany holding the largest market share in 2024. In Germany, thermal imaging is widely utilized across contracting and industrial sectors. By 2025, it is anticipated that 84% of German manufacturers will invest EUR 10 billion annually in smart manufacturing technologies, which includes significant investments in the automotive sector. Additionally, a substantial portion of German companies have adopted digital solutions, with 15 million employees engaged in advanced manufacturing industries.

Key players in the Thermal Imaging Market include Fluke Corp, L3Harris Technologies Inc, Safran SA, Teledyne FLIR LLC, Testo SE & Co. KGaA, and others. These companies are actively pursuing strategies such as product innovation, expansion, and mergers and acquisitions to enhance their market presence and offer cutting-edge thermal imaging solutions.

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