

Ultrasonic Testing Market by Phased Array, Time-of-flight Diffraction, Immersion Testing, Guided Wave Testing, Acoustography, Flaw Detectors, Thickness Gauges, Transducers & Probes, Inspection Services and Calibration Services - Global Forecast to 2029

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Report description:

The ultrasonic testing market is expected to reach USD 4.60 billion by 2029 from USD 2.92 billion in 2024, at a CAGR of 9.5% during the 2024-2029 period.

These investments require rigorous quality assurance and safety inspections on multiple structural components. Global enhancement of infrastructures, including bridges, highways, railways, and energy facilities, requires reliable non-destructive testing methods for detecting flaws. This inspection technique is also known because ultrasonic testing allows for determining the integrity of materials by finding internal flaws without destroying them, thereby being fundamental in the building and subsequent maintenance of any critical structure.

Large investments are made for infrastructure projects in emerging economies like India and China for instance to build new transportation structures, power plants, and urban development. This raises the demand for strict safety standards combined with quality materials and work that would ensure durability and safety. Ultrasonic testing is used to inspect welds, check the material thickness, and analyze the structural integrity of the components in these structures.

"Oil & gas vertical of the ultrasonic testing market is expected to hold the 2nd largest market share during the forecast period from 2024-2029"

Strict regulatory and environmental standards drive ultrasonic testing adoption in the oil and gas industry. This is due to stringent safety and environmental protection guidelines enforced by regulatory bodies. To protect air, water, and soil from hazardous pollutants, the US Environmental Protection Agency (EPA) has mandated some strict leak- and spill-proofing measures, particularly within the oil and gas infrastructure. The Pipeline and Hazardous Materials Safety Administration (PHMSA), through the Pipeline

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Safety Act and other regulations, requires regular inspections of pipelines to detect corrosion cracking and other structural weaknesses. Some amendments, such as the Pipeline Safety Act in 2021, also emphasize the use of more modern, non-destructive testing methods, including ultrasonic testing, such that pipelines meet higher standards for safety where they pose high risks and pass by close to population centers or highly sensitive ecological areas.

"India is projected to grow at the highest CAGR during the forecast period from 2024-2029"

The stringent quality and safety standards set by the government of India in all the key industries have raised the demand for non-destructive testing (NDT) to a considerable level. In this regard, ultrasonic testing has emerged as a crucial tool to meet compliance requirements. With growing aerospace, oil and gas, and infrastructure industries, higher safety and reliability standards are required to avoid failures and ensure efficiency in operations.

Ultrasonic testing in the aerospace industry is a requirement to check the welds and materials while manufacturing aircraft parts. It is regulated by the standards of Indian national specifications of the Directorate General of Civil Aviation, or DGCA. In 2023, the Ministry of Defence made a declaration to enhance the defense manufacturing in India through indigenization, leading to new DRDO guidelines on ultrasonic testing of aircraft and other defense-related equipment. Infrastructure safety standards have also been enhanced.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the Ultrasonic testing market.

The break-up of the profile of primary participants in the Ultrasonic testing market-

-□By Company Type: Tier 1 - 26%, Tier 2 - 32%, Tier 3 - 42%

-□By Designation Type: C Level Executives - 52%, Directors - 23%, Others - 25%

-□By Region Type: North America - 44%, Europe -29 %, Asia Pacific- 23%, RoW - 4%,

The major players in the ultrasonic testing market are Baker Hughes Company (US), EVIDENT (Japan), Eddyfi (Canada), Sonatest (US), NDT Systems Inc (US), SGS SOCIETE GENERALE DE SURVEILLANCE SA. (Switzerland), Intertek Group plc (UK), MISTRAS Group (US), DEKRA (Germany), Applus+ (Spain), TUV Rheinland (Germany), Element Materials Technology (UK), Acoustic Control Systems (Germany), Amerapex Corporation (US), Ashtead Technology (Scotland), Acuren (US), Modsonic Instruments Mfg. Co. (P) Ltd. (India), SONOTEC GmbH (Germany), Applied Technical Services (US), Nexxis (Australia), Vertech Group (Australia), Guided Ultrasonics Ltd. (US), IRISNDT (Canada), Nanjing BKN Automation System Co., Ltd. (China), and OKOndt GROUP (US).

Research Coverage

The report segments the ultrasonic testing market and forecasts its size by region. It also comprehensively reviews drivers, restraints, opportunities, and challenges influencing market growth. The report covers qualitative aspects in addition to quantitative aspects of the market.

This report has categorized the ultrasonic testing market by type (phased array, time-of-flight diffraction, immersion testing, guided wave testing, acoustography), equipment (flaw detectors, thickness gauges, transducers & probes, industrial scanners, tube inspection systems, bond testers, imaging systems), service type (inspection services, equipment rental services, calibration services, training services), vertical (manufacturing, oil & gas, aerospace, government & infrastructure, power generation, automotive, marine), and region (North America, Europe, Asia Pacific, RoW).

Reasons to buy the report:

The report will help the market leaders/new entrants in this market with information on the closest approximate revenues for the overall ultrasonic testing market and related segments. This report will help stakeholders understand the competitive landscape and gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the objectives of the market and provides information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

-□Analysis of key drivers (growing adoption of portable phased array ultrasonic testing equipment), restraint (complex nature of the technology), opportunities (growing emphasis on predictive maintenance), and challenges (high maintenance cost and downtime of equipment)

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new

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product launches in the ultrasonic testing market

-□Market Development: Comprehensive information about lucrative markets - the report analyses the ultrasonic testing market across varied regions.

-□Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the ultrasonic testing market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Baker Hughes Company (US), SGS SOCIETE GENERALE DE SURVEILLANCE SA. (Switzerland), Intertek Group plc (UK), DEKRA (Germany), and MISTRAS Group (US).

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