

Industrial Metrology Market by CMM, ODS, Measuring Instrument, X-Ray & CT System, AOI System, Form Measurement Machine, 2D Equipment, Quality & Inspection, Reverse Inspection, and Mapping & Modeling - Global Forecast to 2030

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Report description:

The global industrial metrology market is estimated to be valued at USD 19.03 billion by 2030, up from USD 14.31 billion in 2025, at a CAGR of 5.9% during the forecast period.

The main growth drivers for industrial metrology market are increasing R&D expenditure in 3D metrology, resulting in more sophisticated and accurate measurement solutions. IoT sensor integration is augmenting real-time data acquisition, predictive maintenance, and process optimization. Increased focus on quality control in precision manufacturing is fueling demand for high-accuracy measurement systems, especially in aerospace, automotive, and electronics. The increasing use of autonomous driving technologies is also increasing the demand for precise metrology solutions in manufacturing critical automotive parts. These combined factors expedite the broad application of industrial metrology across industries, enabling greater production efficiency and compliance with regulatory requirements.

"Software to register the highest CAGR in the offering segment during the forecast period."

The software segment will account for the highest CAGR in industrial metrology during the forecast period due to its imperative role in measurement, testing, and management in all industry sectors. The metrology software simplifies the measurement process as it can integrate easily with the hardware such as coordinate measuring machines (CMMs) and scanners, thereby enabling precise dimensional analysis in applications such as aerospace and automotive. Cloud-enabled products are also changing the market through remote accessibility, real-time cooperation, and optimized data storage, analysis, and management. Hexagon AB, for example, is making investments in software technology through offerings like QUINDOS 2020.2 and cloud-enabled imaging software to improve industrial processes' efficiency and accuracy. The movement towards Industry 4.0 technologies and automation is driving the use of sophisticated metrology software, as manufacturers in growing numbers apply CAD/CAM applications and automation tools for quality assurance and process optimization. The increasing demand for adaptable,

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scalable, and real-time metrology offerings will further drive software growth in the market, and hence it is the fastest-growing segment.

"Aerospace & Defense to account the second largest market share during the forecast period."

The aerospace & defense industry is projected to hold the second-largest share of the end-use industry segment in the industrial metrology market due to its high reliance on precision, quality, and compliance with stringent regulatory standards. Original equipment manufacturers (OEMs) and aircraft makers work in a strongly competitive landscape in which they have to contend with challenges from cost-pressure forces, changing regulations, and sustainability. To provide efficiency and accuracy, the sector is increasingly adopting advanced manufacturing techniques like additive manufacturing, precision machining, and knowledge-based manufacturing. Industrial metrology plays an important role in ensuring accuracy in the production of critical parts like aircraft frames, wings, engines, and subassemblies. Inspection, calibration, and assembly of airframes rely on laser trackers, portable arms, and CMMs for accuracy. Metrology solutions guarantee the accuracy of critical components such as aero-engine turbines, landing gear, actuators, and braking systems for safety and performance. Increased application of metrology in maintenance, repair, and overhaul (MRO) increases efficiency and the life of aerospace assets.

"North America registered the second largest market share during the forecast period."

North America has the second-largest industrial metrology market share, which is fueled by high demand from major industries like automotive, aerospace & defense, and manufacturing. The US, being a major automotive manufacturer, depends on metrology solutions to ensure high-quality levels and enhance production efficiency. Likewise, the aerospace & defense industry increasingly employs metrology technologies to guarantee accuracy in component production and adherence to strict regulations. The enforcement of the United States-Mexico-Canada Agreement (USMCA) has strengthened the regional automotive sector further by imposing stringent local content requirements, promoting domestic manufacturing and raising the demand for industrial metrology solutions. Also, the existence of institutionalized regulatory agencies like the North American Cooperation in Metrology (NORAMET), the National Institute of Standards and Technology (NIST), and the Dimensional Metrology Standards Consortium (DMIS) guarantees standardized practice in measurements, further increasing the use of sophisticated metrology technologies in all industries.

The break-up of the profile of primary participants in the industrial metrology market-

-□By Company Type: Tier 1 - 35%, Tier 2 - 45%, Tier 3 - 20%

-□By Designation Type: C Level - 35%, Director Level - 25%, Others - 40%

-□By Region Type: Europe - 20%, North America - 45%, Asia Pacific - 30%, Rest of the World - 5%

The major players in the industrial metrology market with a significant global presence include Hexagon AB (Sweden), Carl Zeiss AG (Germany), KLA Corporation (US), KEYENCE CORPORATION (Japan), Mitutoyo Corporation (Japan), and others.

Research Coverage

The report segments the industrial metrology market and forecasts its size by offering, equipment, application, end-use industries and region. It also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report covers qualitative aspects in addition to quantitative aspects of the market.

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 industrial metrology 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 pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

-□Analysis of key drivers (increasing R&D investments in 3D metrology, rising integration of IoT sensors into industrial metrology solutions, growing focus on quality control and inspection in precision manufacturing, and mounting deployment of autonomous driving technologies), restraints (limited technical knowledge regarding integration of industrial metrology with robots and 3D models, and concerns regarding big data handling and manufacturing unit configuration), opportunities (growing emphasis on

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quality control and regulatory compliance in food industry, Increasing adoption of cloud-based, IIoT, and AI technologies to store and analyze metrological data, and rising implementation of Industry 5.0 technologies), and challenges (growing concern about cyber security, and shortage of easy-to-use 3D metrology software solutions)

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new solution and service launches in the industrial metrology market.

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

-□Market Diversification: Exhaustive information about new solutions and services, untapped geographies, recent developments, and investments in the industrial metrology market.

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and solution and service offerings of leading players, including Hexagon AB (Sweden), Nikon Corporation (Japan), FARO (US), Carl Zeiss AG (Germany), JENOPTIK (Germany), KLA Corporation (US), Renishaw plc (UK), Mitutoyo Corporation (Japan), KEYENCE CORPORATION (Japan), and CREAFORM (Canada).

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