Volumetric Video Market - Global Outlook & Forecast 2025-2030

Market Report | 2025-04-16 | 243 pages | Arizton Advisory & Intelligence

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Report description:

The global volumetric video market is expected to grow at a CAGR of 26.18% from 2024 to 2030.

Volumetric video represents a paradigm shift in digital content, enabling three-dimensional capture of people, objects, and environments. Unlike traditional videos, it allows users to interact with content from 360-degree perspectives, offering deeply immersive, lifelike experiences. The demand for such realism is being accelerated by consumers' growing appetite for interactive media and spatial computing. Despite the high cost and lack of standardization in 3D content creation, the volumetric video market is gaining strong momentum due to several pivotal developments:

-Technological Advancements: Innovations in 3D capture, including high-definition cameras, LiDAR sensors, and multi-view photogrammetry-are enhancing video quality and reducing production complexity.
-Powerful Infrastructure: The rising availability of high-performance GPUs, edge computing, and cloud-based storage solutions is solving the massive data demands of volumetric content.
-Strategic Investments: In 2024, Gracia AI invested USD 1.2 million into next-gen volumetric video tools tailored for spatial computing, highlighting growing investor confidence.

Furthermore, major tech companies such as Meta, Microsoft, and Apple among others are gradually investing in AR/VR technologies which shows the growing need for immersive experiences in digital space. In 2023, Apple also introduced its Vision Pro headset during the Worldwide Developers Conference (WWDC) which was released globally in 2024 and includes multiple cameras to enable mixed reality, eye and hand tracking for interaction. Thus, the expanding innovations in AR and VR technology are significantly contributing to the volumetric video market growth.

VOLUMETRIC VIDEO MARKET TRENDS & DRIVERS

Rising Demand in the Live Sports & Entertainment Industry

The live streaming sports events have revolutionized sports content for its consumers in recent years. Major platforms like ESPN+, DAZN, Amazon Prime, and social media channels like YouTube and Facebook have witnessed significant user engagement in sports streaming. For instance, in 2023 DAZN became Europe's biggest digital sports broadcaster app and has around 15 million subscribers worldwide. In 2022 Amazon Prime Video recorded over 25 million viewers for its extensive NFL Thursday Night Football streams. Hence, the rapid expansion of live sports and entertainment industries has gradually boosted the volumetric video market.

Advancing Volumetric Videos Realism with Generative AI

In volumetric videos generative AI is significantly enhancing the realism of immersive media experiences, thereby propelling the growth of the market. Generative AI refines the 3D capabilities fills the missing data and improves the resolution of volumetric video which makes it more lifelike and engaging. Moreover, the integration of AI in volumetric video is transforming the immersive content as AI enhances the quality of volumetric captures by improving its resolution and texture refining to make it more real. The usage of AI also reduces the manual effort required in postproduction enabling faster and cost effective content creation.

Improvements in 3D Capture & Displays

The volumetric video market witnessed significant advancements in recent years driven by the increasing demand for various sectors like entertainment, education, and healthcare. The development of affordable 3D cameras and sensors is one of the major advancements of the volumetric video market. Further, companies are also increasingly investing in high-resolution depth sensors LiDAR technology, and multi-camera systems to improve the quality and efficiency of 3D captures. For instance, companies like Gracia AI use Gaussian splatting to record volumetric videos viewable on devices such as the Meta Quest headsets allowing users to observe scenes from various angles and enhance their experience.

Revolutionizing Gaming & E-Sports

The global volumetric video market is changing the gaming industry as is used in applications like character animation, world construction, and player immersion. Game makers use these types of videos to capture real-life performances and incorporate them into gaming environments such as live creatures with realistic reactions and motions which improves the gaming experience of players by offering more engaging and immersive experiences. For instance, in 2024, Arcturus, a volumetric video developer company, introduced an update for its HoloSuite software that transfers lightweight, scalable volumetric video into game engines which allows it to execute and playback in real-time. Further, by using a new high-performance codec, Accelerated Volumetric Video (AVV) users can populate digital scenes with more volumetric characters than has typically been possible and at the same time maintain a higher level of data quality.

SEGMENTATION INSIGHTS

INSIGHTS BY COMPONENT TYPE

Based on component type the global volumetric video market is segmented into hardware, software, and services segments. In 2024, the hardware segment dominated the market share because of its high demand for advanced imaging devices, sensing cameras, and processing units. However, the high cost associated with hardware is expected to hinder the demand. Major players are also focusing on investing in R&D to enhance hardware capabilities to reduce production costs which makes volumetric technology accessible for smaller businesses as well.
Furthermore, the software segment is the second largest segment, which also has a significant role in contributing to the market growth of volumetric videos. With advancements in AI-driven processing and cloud-based software solutions, the segment is expected to grow gradually during the forecast period. However, the difficulty of volumetric video processing remains challenging

and needs continuous improvements in ML algorithms and automation. Additionally, the services segment is anticipated to grow at a high CAGR rate of over 27% in the global volumetric video market during the forecast period as technology gains momentum the users need specialized services to support implementation, content production, and system integration.

Segmentation by Component Type
-Hardware
-Software
-Services

INSIGHTS BY DISPLAY TYPE

In 2024, the AR/VR HDMs segment held the largest global volumetric video market. The rising adoption of immersive content in gaming, education, training, and entertainment among others is surging the demand for this segment as these headsets are easy to use and provide seamless integration for interactive applications. In gaming and interactive entertainment, these displays allow users to interact with characters and objects captured using volumetric content. This creates more realistic and dynamic in-game avatars which enhances the gameplay.

Segmentation by Display Type
-AR/VR HDMs
-Volumetric Displays
-Projectors
-Other Displays

INSIGHTS BY APPLICATIONS

The global volumetric video market by applications is segmented into media & advertisement, sports & events, gaming, education & training, and other applications. In 2024, the media & advertisement segment dominated the global market share and is expected to add additional revenue of over USD 2.5 billion by 2030. Several brands are using these technologies to create interactive ads that can be explored from different angles. This 360-degree capture allows users to engage themselves in product experience which leads to higher engagement rates. In media, volumetric content is used to create 3D news reports that allow viewers to see news from 3D environments. This enhances the experiences, especially for complex or dynamic visuals, such as natural disasters or war zones.
Furthermore, the gaming segment is growing at the highest CAGR in the global volumetric video market during the forecast period. AR gaming, particularly on mobile devices, is getting benefits from volumetric content as it allows players to interact with 3D characters and objects in their real-world environment. This has become popularized by games, such as Pokemon Go, which uses AR to bring 3D characters into the physical world.

Segmentation by Applications

-Media & Advertisement
-Sports & Events
-Gaming
-Education & Training
-Other Applications

VOLUMETRIC VIDEO MARKET GEOGRAPHICAL ANALYSIS

North America holds the largest share of the global volumetric video market, accounting for over 35% in 2024. The growth is inspired by the growing adoption of immersive media by brands across the region in advertising to create interactive and 3D advertisements. This is especially prominent in the retail sector, where consumers can engage with virtual product demonstrations via holographic displays or AR experiences on their smartphones. Further, Europe is the second-largest volumetric video market and is expected to grow at a CAGR of over 25% during the forecast period. The film industry particularly in the UK and Germany is incorporating volumetric content into high-end TV series and movies. Studios are using volumetric capture to create immersive special effects and 3D environments. The UK film industry is increasingly adopting 3D video technology for both feature films and virtual reality projects. For instance, in 2024, WPP plc, a UK-based advertising company introduced an AI-powered production studio which is developed with the help of NVIDIA Omniverse to create 3D products throughout the production lifecycle.
APAC is projected to witness the fastest CAGR in the global volumetric video market during the forecast period. Countries, such as China, Japan, and Australia are investing in the establishment of volumetric content studios to support the local entertainment and advertising sectors. For instance, in 2023, NantStudios developed the largest permanent LED volume at Docklands Studios in Melbourne, Australia. Moreover, governments in countries, such as China and Japan are actively supporting the development of immersive technologies, including 3D video, through funding and technology initiatives.
Moreover, the market in Latin America, and Middle East & Africa, has a low market share but has a huge impact on the volumetric video market because of the rising adoption of this technology across the gaming sector. Brazil is one of the largest gaming markets in the world which is continuously adopting 3D technology to encourage user engagement, thereby supporting the volumetric video market growth.

Segmentation by Geography

- North America
  - The U.S.
  - Canada
- Europe
  - Germany
  - The U.K.
  - France
  - Italy
  - Spain
  - Sweden
- APAC
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Indonesia
- Latin America
  - Brazil
  - Mexico
  - Argentina
  - Chile
- Middle East & Africa
  - UAE
  - Saudi Arabia

o South Africa
o Turkey

VOLUMETRIC VIDEO MARKET VENDOR ANALYSIS

The global volumetric video market is categorized by the presence of numerous established and emerging players such as Microsoft, Intel, Google, Sony, 8i, and 4Dviews, among others. These companies are investing in R&D and strategic advancements to enhance their volumetric video capabilities and expand their product offerings. For instance, in 2023, Unity Technologies and Google LLC collaborated and done a collaboration that aimed at assisting studios in expediting the growth and advancement of live games. Further, with the rising adoption of immersive technologies across industries such as entertainment, sports, and advertising, the competition among players in the global volumetric video market is increasing. Key factors driving competition include video quality, real-time rendering capabilities, content personalization, cost-effectiveness, and compatibility with AR or VR applications.
The competition in the global volumetric video market is expected to intensify with rising investments in R&D, product diversification, and mergers and acquisitions. Market players are also expanding their global reach, particularly in emerging markets such as APAC and Latin America, where there is a growing demand for innovative video solutions. Companies with robust financial and technological resources have an advantage in introducing advanced solutions, potentially overtaking competitors that lack the capital to invest in cutting-edge developments.

Global Volumetric Video Market Latest News & Developments

- In 2024 Meta launched a redesigned video player on Facebook that combines Reels, longer movies, and Live content into a single widescreen, entertaining experience.
- In 2024 Foundry introduced Modo 17.0 with a significant performance update and up to 50 times quicker rendering.
- In 2024 OTOY, Roddenberry Entertainment, and Paramount Game Studios announced a major expansion of the archive for Apple Vision Pro.
- In 2024, Djinn Technologies, a UK-based company developing advanced volumetric and spatial camera sensor and scanning technologies, acquired EF EVE, a provider of consumer-friendly volumetric and spatial capture software.
- In 2024, Arcturus released several updates for its HoloSuite platform for volumetric video editing and XR content creation. With the new blend tool, HoloSuite users can connect volumetric video clips and blend them seamlessly.

Key Company Profiles

- Microsoft Corporation
- Intel
- 8i
- Unity Technologies

Other Prominent Vendors

- Meta
- Sony Corporation
- 4Dviews
- IO Industries
- Canon Inc
- Nephelie Technologies Limited
- Evercoast

-ARCTURUS
-Mantis Vision
-Gracia AI, Inc
-AIXR
-RealView Imaging
-Volograms Limited
-Raytrix
-Nikon
-MRMC
-Voxon

KEY QUESTIONS ANSWERED:

1.How big is the global volumetric video market?
2.What is the growth rate of the global volumetric video market?
3.Which region dominates the global volumetric video market share?
4.What are the significant trends in the volumetric video market?
5.Who are the key players in the global volumetric video market?

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SCOTTS INTERNATIONAL

Volumetric Video Market - Global Outlook & Forecast 2025-2030

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