

## **NDT - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The NDT Market size is estimated at USD 22.78 billion in 2025, and is expected to reach USD 32.44 billion by 2030, at a CAGR of 7.32% during the forecast period (2025-2030).

#### Key Highlights

- The non-destructive testing (NDT) market is anticipated to witness robust growth owing to several factors, such as increased emphasis on safety, integrity, and reliability, expansion of the power generation sector, technological advancements like AI, ML, industry 4.0, industrial IoT, and an upsurge in manufacturing activities.
- Furthermore, increased oil and gas, construction projects, and rising defense expenditures of various countries create significant demand for NDT equipment and services. Further, rising sales of electric vehicles and autonomous cars fuel demand for non-destructive testing equipment and services in the automotive sector.
- In the automotive industry, non-destructive testing (NDT) is widely adopted to inspect automotive components after forging, heat treatment, and machining to ensure they meet established standards. NDT is also critical for examining welds that join body panels and components, ensuring they have adequate penetration, are free of inclusions, and are devoid of defects that could compromise vehicle safety or reliability. The growing demand for electric and autonomous vehicles creates a huge demand for the NDT.
- The lack of skilled personnel and training facilities significantly restrains the growth of this market. One of the primary challenges faced by the NDT market is the shortage of skilled personnel. The effective utilization of NDT requires a high level of technical expertise and proficiency in interpreting and analyzing test results.
- Geopolitical challenges, including the Russian invasion of Ukraine, China-US competition, elections, and the war in Israel, significantly impact the global supply chain, especially critical raw materials vital for traditional industries, defense, high-tech sectors, aerospace, and green energy.

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- The Russia-Ukraine war and economic slowdown caused significant disruption in the NDT industry. The increased inflation and interest rates reduced consumer spending, hampered the industry's demand, and led to slow growth in the market. Furthermore, the trade war between the United States and China further disturbed the global supply chain. Owing to strict export and import controls on China by the United States for semiconductor equipment hampers the production of oil and gas, power and energy, construction, and the automotive sector in China.

## Non-Destructive Testing Market Trends

### Retractable Safety Syringes Segment Expected to Witness Significant Growth During the Forecast Period

- Non-destructive testing (NDT) technology is pivotal in the defense industry, guaranteeing top-tier quality in materials and joining processes, from fabrication to erection. It's instrumental in ensuring military forces are combat-ready, as even a minor flaw from corrosion or wear could lead to catastrophic failures, jeopardizing significant investments.
- Quality control through NDT is paramount in manufacturing military equipment, directly impacting its reliability. In combat scenarios, the efficacy of these systems hinges on meticulous ultrasonic and eddy current NDT testing, ensuring components meet specifications and any replacements or repairs are flawless.
- Storage tanks are prevalent in the security and defense sector, primarily housing aviation or ship fuel and, sometimes, standard vehicle fuel. These tanks come in various forms: above-ground, buried, or semi-buried, in both horizontal and vertical configurations. NDT technology is widely used to inspect these tanks to avoid future defects.
- The imperative for quality assurance and control in the manufacturing, maintenance, and repairing of aircraft, missiles, and defense systems propels the demand for NDT technologies. The global growth in military aircraft fleets underscores the rising demand for routine inspections, maintenance, and NDT testing, which is crucial for prolonging aircraft lifespans.
- For instance, in July 2024, the US military announced that it planned to deploy dozens of its latest fighter jets to bolster its presence in Japan. This initiative, part of a USD 10 billion upgrade, aims to fortify the US-Japan Alliance, heighten regional deterrence, and promote peace in the Indo-Pacific. Specifically, the plan entails replacing 36 F-16s at Misawa Air Base with 48 advanced F-35A fighters. Additionally, 36 new F-15EX jets will be stationed at Kadena Air Base in Okinawa, replacing 48 older F-15C/D models phased out in 2023.
- European NATO Allies are set to collectively invest USD 380 billion in defense, marking the first instance where this expenditure reaches 2% of their combined GDP. In 2024, the United States allocated an estimated USD 967.7 billion to defense, solidifying its position as the largest defense spender among all NATO nations. Germany trailed as the second-largest spender, allocating USD 97.7 billion, with the UK ranking third.

### North America Expected to Hold Significant Market Share During the Forecast Period

- The United States holds a prominent position in the automotive market thanks to its large domestic market and widespread adoption of mass production methods. The automotive industry in the United States is a crucial part of the manufacturing sector, with multiple car manufacturers running assembly plants nationwide. Notable companies such as Ford, Chevrolet, and Tesla are based in the country, which has played a leading role in automotive innovation, particularly in automation, which supports the demand for non-destructive testing services in the country.
- Non-destructive testing (NDT) is essential in the country's automotive sector as it examines components post-forging, heat treating, and machining to verify compliance with regulations. It is also utilized to assess the quality of welds connecting body panels and components, ensuring proper penetration, the absence of inclusions, and the absence of defects that may jeopardize the safety and dependability of a vehicle.

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- The market's growth is also driven by the increasing popularity of vehicle electrification and government regulations, which encourage cleaner energy sources. The White House announced a combination of public and private pledges that support President Biden's goal of having 50% of all new vehicle purchases be electric by 2030. These efforts, designed to promote the adoption of electric vehicles, are expected to influence the market significantly.
- According to the Alliance for Automotive Innovation Report, in the first quarter of 2024, electric vehicles (EVs) made up 9.3% of new sales of light-duty vehicles, a slight decrease from 10.2% in the fourth quarter of 2023 but an increase from 8.6% in the first quarter of 2023. The United States witnessed a 13% increase in EV sales in the first quarter of 2024, with over 344,000 EVs sold compared to Q1 2023.
- The demand for the non-destructive testing market in Canada is increasing due to the country's growing oil and gas industry. The oil and gas sector dominates the Canadian GDP, with capital investments and exports. Attractive provincial incentives to encourage drilling, increased implementation of long horizontal wells, and multistage fracturing in shale resources are the major drivers in enhancing the Canadian oil and gas industry.
- The oil and natural gas sector in Canada operates within 12 out of the 13 provinces and territories. Large companies are ramping up their spending to pump more oil out of the ground; there was a 3.62% increase in crude oil production between September and October 2023, according to Statistics Canada.

## Non-Destructive Testing Industry Overview

The Non-Destructive Testing (NDT) market is highly fragmented due to the presence of both global players and small and medium-sized enterprises. Some of the major players in the market are Evident Corporation (Olympus Corporation), Zetec Inc. (Eddyfi Technologies), YXLON International GMBH (COMET Group), Team Inc., and Applus Services SA. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

□ June 2024 - TUV Rheinland North America announced the launch of its Northeast Technology and Innovation Center in Boxborough, MA. This modern facility signifies a substantial commitment for the prominent organization. Encompassing 65,000 square feet, this advanced facility has infrastructure for electrical safety, wireless technology, EMC testing, environmental assessments, medical device testing, and beyond.

□ January 2024 - Intertek Group PLC launched a service called Intertek Inform, which provides standards and regulations to facilitate quicker access to the market. Access to standards is becoming essential for companies wishing to compete and supply products and services in current and developing markets due to the growing demand for quality, safety, and sustainability.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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