

NDT and Inspection Market by Technique (Ultrasonic Testing, Visual, Magnetic Particle, Liquid Penetration, Eddy-Current, Radiographic, Acoustic Emission), Service, Method, Vertical, Application and Region - Global Forecast to 2030

Market Report | 2025-08-28 | 293 pages | MarketsandMarkets

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Report description:

The NDT and inspection market is projected to reach USD 22.34 billion by 2030 from USD 14.99 billion in 2025 at a CAGR of 8.3% during the forecast period.

Several factors are driving the robust growth of the NDT and inspection market. Increasing focus on asset integrity, public safety, and product quality, coupled with stringent regulations from bodies such as ASME, API, and ISO, is compelling industries to invest in advanced testing and inspection solutions. The aging infrastructure in developed regions and the surge in large-scale projects across oil & gas, aerospace, power generation, and automotive sectors further boost the demand for reliable NDT techniques. Technological advancements, including AI-driven analytics, IoT-enabled sensors, robotics, and digital twins, are transforming inspection processes by enabling real-time monitoring, predictive maintenance, and improved defect detection. However, high costs associated with advanced NDT equipment, coupled with the shortage of skilled professionals and integration challenges with legacy systems, can restrain adoption. Additionally, limited awareness in emerging markets and the complexity of standardizing inspection processes across diverse industries pose further challenges to widespread market expansion.

"By technique, acoustic emission testing (AET) is expected to register the highest CAGR during the forecast period."

The acoustic emission testing (AET) segment is projected to register the highest CAGR in the NDT and inspection market during the forecast period, driven by its growing adoption for real-time structural health monitoring and early fault detection in critical assets. AET is increasingly favoured in industries such as oil & gas, power generation, aerospace, and public infrastructure due to its ability to detect dynamic changes like crack growth, corrosion, and material deformation under stress, which traditional NDT methods may not identify at an early stage.

The technique's compatibility with advanced digital technologies, including AI-based signal analysis, IoT-enabled sensors, and cloud-based data management, is further enhancing its accuracy and usability. AET systems enable continuous, non-invasive

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monitoring, reducing downtime and operational risks while supporting predictive maintenance strategies. Its applications are expanding rapidly in pipelines, pressure vessels, bridges, and wind turbines, where safety and reliability are critical. The shift toward smart asset management and Industry 4.0 practices is accelerating the deployment of AET solutions. Key players in the market are focusing on developing portable, wireless, and automated AET systems that provide remote monitoring capabilities. As industries prioritize efficiency, safety, and cost optimization, AET is set to become a pivotal technology within the NDT and inspection landscape.

By service, the inspection services segment is projected to account for the largest market share during the forecast period." The inspection services segment is expected to hold the largest share of the NDT and inspection market during the forecast period, driven by the growing demand for outsourced expertise, cost efficiency, and compliance with stringent safety and quality standards. Inspection services are critical across industries such as oil & gas, aerospace, power generation, automotive, and infrastructure, where ensuring asset integrity and operational safety is paramount. These services involve a wide range of NDT techniques, including ultrasonic testing (UT), radiographic testing (RT), magnetic particle testing (MPT), and eddy-current testing (ECT), which enable accurate defect detection without damaging critical components.

The rising complexity of industrial assets and the growing need for predictive maintenance are encouraging companies to rely on specialized service providers that offer advanced inspection solutions integrated with AI, IoT, and digital twin technologies. Additionally, the adoption of drones, robotics, and automated inspection platforms is enhancing the efficiency and safety of field operations, especially in hazardous or remote environments. Many companies are turning to third-party inspection services to ensure regulatory compliance with standards set by ASME, ISO, and other global bodies, while minimizing downtime and operational risks. With rapid industrialization and infrastructure development in emerging markets, the demand for professional inspection services is expected to grow steadily, reinforcing its dominant position in the NDT and inspection market.

"Asia Pacific is projected to account for the second-largest market share during the forecast period."

The Asia Pacific region is projected to hold the second-largest share of the global NDT and inspection market during the forecast period, driven by rapid industrialization, expanding infrastructure, and stringent safety regulations across key industries. Countries such as China, India, Japan, South Korea, and Australia are witnessing significant investments in sectors like oil & gas, power generation, aerospace, and automotive, all of which require advanced inspection technologies to ensure operational safety, quality, and compliance with international standards.

Government initiatives promoting infrastructure modernization, coupled with growing energy demand and pipeline development projects, are boosting the adoption of non-destructive testing methods such as ultrasonic testing (UT), radiographic testing (RT), and eddy-current testing (ECT). Additionally, the rapid growth of renewable energy projects, particularly wind and solar, is driving the need for structural health monitoring and predictive maintenance.

Asia Pacific is also emerging as a hub for manufacturing and exports, which is increasing the demand for advanced, cost-efficient inspection solutions. Local players, in collaboration with global NDT companies, are expanding their service capabilities by integrating AI, IoT, and robotics to enhance accuracy and reduce downtime. With its dynamic industrial base and supportive regulatory frameworks, Asia Pacific continues to be a key growth engine for the global NDT and inspection market.

Break-up of the profile of primary participants in the NDT and inspection market:

-□By Company Type: Tier 1 - 25%, Tier 2 - 35%, Tier 3 - 40%

-□By Designation Type: C Level - 40%, Director Level - 30%, Others - 30%

-□By Region: North America - 35%, Europe - 30%, Asia Pacific - 25%, Rest of the World - 10%

Note: Other designations include sales, marketing, and product managers.

The three tiers of the companies are based on their total revenues as of 2024; Tier 1: >USD 1 billion, Tier 2: USD 500 million-1 billion, and Tier 3: USD 500 million

The major players in the NDT and inspection market with a significant global presence include SGS Societe Generale de Surveillance SA (SGS SA) (Switzerland), Bureau Veritas (France), Baker Hughes Company (US), Applus+ (Spain), and Intertek Group plc (UK).

Research Coverage

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The report segments the NDT and inspection market and forecasts its size by technique, service, vertical, application, and region. It also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing the 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 NDT and inspection 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 (Implementation of stringent safety regulations to ensure public safety and product quality, Increased adoption in electronics, automation, and robotics industries to extend equipment lifespan, enhance production efficiency, and improve product quality□, Growing use of AI and IoT technologies in NDT and inspection, Increased demand for structural health monitoring and maintenance of infrastructure), restraints (Lack of skilled technicians for conducting NDT and inspection, High cost of NDT equipment and related technologies), opportunities (Extensive infrastructure development in Asia Pacific, Europe, and South America, Growing demand for NDT and inspection services in power industry, Advancements in NDT and inspection techniques and emergence of new technologies, Growing demand for miniaturized and portable NDT devices, Growing emphasis on sustainability and eco-friendly practices), and challenges (Growing complexity of industrial structures and machines, High replacement costs associated with automated NDT and inspection equipment)
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product/service launches, agreements, partnerships, collaborations, acquisitions, and investments in the NDT and inspection market
- Market Development: Comprehensive information about lucrative markets ? the report analyses the NDT and inspection market across varied regions.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the NDT and inspection market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product/service offerings of leading players, such as SGS Societe Generale de Surveillance SA (SGS SA) (Switzerland), Bureau Veritas (France), Baker Hughes Company (US), Applus+ (Spain), Intertek Group plc (UK), MISTRAS Group (US), TUV Rheinland (Germany), DEKRA (Germany), Evident (US), and Ashtead Technology (UK)

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