

**Virtual Production Market by Hardware, Software, Rental Services, Pre-production, Production, Post-production, Movies, Television Series, Commercial Advertisements, Online Videos, Events, Theatres, Music Concerts - Global Forecast to 2030**

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**Report description:**

The global virtual production market is estimated to be valued at USD 8.76 billion by 2030, up from USD 2.10 billion in 2025, at a CAGR of 33.1% during the forecast period.

<https://www.marketsandmarkets.com/Images/virtual-production-market1.webp>

The virtual production market is growing rapidly, driven by the increasing use of large-scale LED volumes that support in-camera visual effects (ICVFX) and improve on-set filmmaking efficiency. The rising demand from streaming platforms, along with growing applications in live events, advertising, and music videos, is expanding its reach beyond traditional film and TV. Additionally, advances in AI-powered real-time rendering are changing creative workflows, providing directors and producers with more flexibility and quicker decision-making during shoots. These factors are collectively speeding up the adoption of virtual production worldwide. Simultaneously, there are strong opportunities in new areas like corporate storytelling, education, and virtual training, where immersive and affordable content creation is becoming more important. The increasing use of cloud-based workflows is also supporting remote collaboration, enabling decentralized production models that cut costs and widen access to talent worldwide.

"The pre-production segment is expected to register the fastest growth in the type segment of the market during the forecast period."

The pre-production segment is expected to grow the fastest in the virtual production market during the forecast period. This growth is driven by the increased use of advanced visualization and planning tools in content creation. Virtual production enables directors, producers, and creative teams to pre-visualize complex scenes accurately with real-time 3D engines, virtual cameras,

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and digital assets. This improves creative certainty, boosts collaboration among geographically dispersed teams, and shortens production cycles by addressing potential issues before filming starts. The demand for high-quality visual storytelling in films, episodic series, and commercials supports adoption, as stakeholders aim to lower costs while maintaining creative flexibility. Additionally, the growth of cloud-based pre-production workflows and AI tools for asset creation and scene planning makes these technologies more accessible for both large studios and smaller production companies. With streaming platforms demanding faster content turnaround and higher visual quality, the pre-production phase becomes a vital stage for applying virtual production technologies. These factors make the pre-production segment a high-growth opportunity, allowing studios to balance creativity, efficiency, and cost savings in an increasingly competitive media landscape environment.

"Television series is expected to account for the second largest segment of the end-user segment of the market during the forecast period."

Television series are expected to make up the second-largest share of the virtual production market's end-user segment during the forecast period. The rise of global streaming platforms has greatly increased demand for episodic content, prompting studios to speed up production timelines while maintaining cinematic quality. Virtual production technologies help television studios create immersive environments, dynamic sets, and real-time visual effects without the logistical and financial challenges of traditional location shoots. This is especially helpful for series with recurring settings or long story arcs, where LED volumes, pre-visualization, and virtual assets decrease the need for repeated location scouting and physical set building. Additionally, in the competitive streaming landscape-where platforms like Netflix, Disney+, and Amazon Prime vie for subscribers-increased investments are being made in visually rich series with high production value. Virtual production also offers creative flexibility, allowing directors to experiment and refine visual storytelling while reducing downtime between episodes. The ability to efficiently produce high-quality episodic content positions television series as a key driver for adoption. As streaming viewership continues to grow worldwide, television series are likely to remain a major and rapidly expanding use case for virtual production technologies.

"North America is expected to account for the largest market share in 2025."

North America is projected to hold the largest share of the virtual production market in 2025, thanks to the region's strong entertainment industry, advanced technological infrastructure, and concentration of top studios. Hollywood and major production centers in the US have been early users of virtual production, with high-profile projects like *The Mandalorian* and *The Batman* demonstrating the benefits of LED volumes, real-time rendering, and hybrid workflows. The region also benefits from the presence of leading technology companies, including Epic Games, NVIDIA, and Planar, which foster innovation in real-time engines, graphics processing, and display solutions. Additionally, heavy investment by streaming services and media conglomerates is increasing demand for high-quality, immersive content. Government incentives and tax credits in certain states further encourage adoption, allowing production companies to incorporate virtual production into regular workflows. Canada is also gaining importance, with Vancouver and Toronto acting as hubs for both film and TV content. The combination of established infrastructure, skilled workforce, and ongoing investment makes North America the leading region in the virtual production market, setting standards for other areas in adoption and growth innovation.

The break-up of the profile of primary participants in the virtual production market-

-□By Company Type: Tier 1 - 45%, Tier 2 - 35%, Tier 3 - 30%

-□By Designation Type: C Level - 32%, Director Level - 40%, Others - 28%

-□By Region Type: Europe - 15%, North America - 40%, Asia Pacific - 37%, Rest of the World - 8%

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 virtual production market with a significant global presence include Sony Group Corporation (Japan), NEP Group, Inc. (US), Nikon Corporation (Japan), Adobe (US), PRG (US), and others.

Research Coverage

The report segments the virtual production market and forecasts its size based on offering, type, end user, and region. It also provides a comprehensive review of drivers, restraints, opportunities, and challenges affecting market growth. The report covers both qualitative and quantitative aspects market.

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Reasons to buy the report:

The report will assist market leaders and new entrants by providing approximate revenue figures for the overall virtual production market and its related segments. It will help stakeholders understand the competitive landscape and gain insights to strengthen their market position and develop effective go-to-market strategies. Additionally, the report offers stakeholders a pulse on the market and information on key drivers, restraints, opportunities, and other relevant factors challenges.

The report provides insights into the following pointers:

- Analysis of key drivers (expanding use of large-scale LED volumes for in-camera VFX, growing demand from streaming platforms, live events, and advertising beyond traditional film and television, rising adoption of AI-driven real-time rendering.), restraints (high upfront investment costs, and shortage of skilled professionals), opportunities (expansion into corporate storytelling, education, and virtual training, rising adoption of cloud-based virtual production workflows enabling remote collaboration), and challenges (LED wall limitations in color accuracy and brightness, particularly for outdoor scene simulation, continue to impact production quality, interoperability issues between hardware, software, and rendering engines)
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the virtual production market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the virtual production market across varied regions.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the virtual production market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product and service offerings of leading players, including Sony Group Corporation (Japan), NEP Group, Inc. (US), Nikon Corporation (Japan), Adobe (US), and PRG (US).

## Table of Contents:

1	INTRODUCTION	23
1.1	STUDY OBJECTIVES	23
1.2	MARKET DEFINITION	23
1.3	STUDY SCOPE	24
1.3.1	MARKET SEGMENTATION & REGIONAL SCOPE	24
1.3.2	INCLUSIONS & EXCLUSIONS	24
1.3.3	YEARS CONSIDERED	25
1.3.4	CURRENCY CONSIDERED	25
1.3.5	UNIT CONSIDERED	25
1.4	STAKEHOLDERS	25
1.5	SUMMARY OF CHANGES	26
2	RESEARCH METHODOLOGY	27
2.1	RESEARCH DATA	27
2.1.1	SECONDARY AND PRIMARY RESEARCH	29
2.1.2	SECONDARY DATA	29
2.1.2.1	List of key secondary sources	30
2.1.2.2	Key data from secondary sources	30
2.1.3	PRIMARY DATA	30
2.1.3.1	Breakdown of primaries	31
2.1.3.2	List of key primary interview participants	31
2.1.3.3	Key data from primary sources	32
2.1.3.4	Key industry insights	32
2.2	FACTOR ANALYSIS	33
2.2.1	SUPPLY-SIDE ANALYSIS	33

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2.2.2	DEMAND-SIDE ANALYSIS	33
2.3	MARKET SIZE ESTIMATION	34
2.3.1	BOTTOM-UP APPROACH	34
2.3.2	TOP-DOWN APPROACH	35
2.3.3	GROWTH PROJECTIONS AND FORECAST ASSUMPTIONS	35
2.4	DATA TRIANGULATION	36
2.5	STUDY ASSUMPTIONS	37
2.6	RESEARCH LIMITATIONS	37
2.7	RISK ANALYSIS	37
3	EXECUTIVE SUMMARY	38
?		
4	PREMIUM INSIGHTS	42
4.1	ATTRACTIVE GROWTH OPPORTUNITIES FOR MARKET PLAYERS	42
4.2	VIRTUAL PRODUCTION MARKET, BY OFFERING	42
4.3	VIRTUAL PRODUCTION MARKET, BY TYPE	43
4.4	VIRTUAL PRODUCTION MARKET, BY COUNTRY	43
4.5	VIRTUAL PRODUCTION MARKET, BY REGION	44
5	MARKET OVERVIEW	45
5.1	INTRODUCTION	45
5.2	MARKET DYNAMICS	45
5.2.1	DRIVERS	46
5.2.1.1	Expanding use of large-scale LED volumes for in-camera VFX	46
5.2.1.2	Growing demand from streaming platforms, live events, and advertising beyond traditional film/TV	46
5.2.1.3	Rising adoption of AI-driven real-time rendering	47
5.2.2	RESTRAINTS	48
5.2.2.1	High upfront investment costs and shifting talent gap	48
5.2.2.2	Limited pool of professionals skilled in advanced technologies	48
5.2.3	OPPORTUNITIES	49
5.2.3.1	Expansion into corporate storytelling, education, and virtual training	49
5.2.3.2	Adoption of cloud-based virtual production workflows for remote collaborations	49
5.2.4	CHALLENGES	50
5.2.4.1	Limitations in LED wall for outdoor scene simulation	50
5.2.4.2	Interoperability issues and lack of standardized protocols	50
5.3	SUPPLY CHAIN ANALYSIS	51
5.4	ECOSYSTEM ANALYSIS	53
5.4.1	ROLE IN ECOSYSTEM	53
5.5	PRICING ANALYSIS	54
5.5.1	AVERAGE SELLING PRICE TREND OF HARDWARE, BY KEY PLAYER, 2021-2024	54
5.5.2	AVERAGE SELLING PRICE TREND OF HARDWARE, BY REGION, 2021-2024	55
5.6	TRENDS & DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	55
5.6.1	REVENUE SHIFT AND NEW REVENUE POCKETS FOR MARKET PLAYERS	55
5.7	TECHNOLOGY ANALYSIS	56
5.7.1	KEY TECHNOLOGIES	56
5.7.1.1	Real-time rendering	56

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- 5.7.1.2 LED displays 56
- 5.7.2 COMPLEMENTARY TECHNOLOGIES 56
  - 5.7.2.1 Camera tracking 56
  - 5.7.2.2 Motion capture 57
  - ?
  - 5.7.3 ADJACENT TECHNOLOGIES 57
    - 5.7.3.1 Cloud rendering & remote collaboration 57
    - 5.7.3.2 Artificial intelligence & machine learning 57
- 5.8 PORTER'S FIVE FORCES ANALYSIS 57
  - 5.8.1 THREAT OF NEW ENTRANTS 58
  - 5.8.2 THREAT OF SUBSTITUTES 59
  - 5.8.3 BARGAINING POWER OF SUPPLIERS 59
  - 5.8.4 BARGAINING POWER OF BUYERS 59
  - 5.8.5 INTENSITY OF COMPETITIVE RIVALRY 59
- 5.9 KEY STAKEHOLDERS & BUYING CRITERIA 60
  - 5.9.1 KEY STAKEHOLDERS IN BUYING PROCESS 60
  - 5.9.2 KEY BUYING CRITERIA 61
- 5.10 CASE STUDY ANALYSIS 61
  - 5.10.1 SUCCESSFUL IMPLEMENTATION OF MASSIVE LED VIRTUAL PRODUCTION BY ABSEN & VERSATILE 61
  - 5.10.2 EFFECTIVE USE OF VIRTUAL PRODUCTION FOR STREAMING BMW BERLIN MARATHON 62
  - 5.10.3 TRANSFORMATION OF LOCATION-BASED SHOOT TO VIRTUAL PRODUCTION STUDIO SHOOT 62
- 5.11 TRADE ANALYSIS 63
  - 5.11.1 IMPORT DATA FOR HS CODE 900710, 2020-2024 63
  - 5.11.2 EXPORT DATA FOR HS CODE 900710, 2020-2024 64
- 5.12 PATENT ANALYSIS 65
  - 5.12.1 LIST OF MAJOR PATENTS 65
- 5.13 KEY CONFERENCES & EVENTS, 2025-2026 66
- 5.14 TARIFF & REGULATORY ANALYSIS 67
  - 5.14.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 67
  - 5.14.2 TARIFFS, REGULATIONS, AND STANDARDS 69
    - 5.14.2.1 Tariffs 69
    - 5.14.2.2 Regulations 69
    - 5.14.2.3 Standards 69
- 5.15 IMPACT OF AI/GEN AI ON VIRTUAL PRODUCTION MARKET 70
- 5.16 IMPACT OF 2025 US TARIFF ON VIRTUAL PRODUCTION MARKET 71
  - 5.16.1 INTRODUCTION 71
  - 5.16.2 KEY TARIFF RATES 71
  - 5.16.3 PRICE IMPACT ANALYSIS 72
  - 5.16.4 IMPACT ON COUNTRY/REGION 73
    - 5.16.4.1 North America 73
      - 5.16.4.1.1 US 73
      - 5.16.4.1.2 Europe 73
      - 5.16.4.1.3 Asia Pacific 74

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- 5.16.5 IMPACT ON END-USE INDUSTRIES 74
- 6 VIRTUAL PRODUCTION MARKET, BY OFFERING 75
  - 6.1 INTRODUCTION 76
  - 6.2 HARDWARE 78
    - 6.2.1 ACCELERATING CONTENT INNOVATION THROUGH ADVANCED LED AND CAMERA ECOSYSTEMS TO AUGMENT MARKET GROWTH 78
  - 6.3 SOFTWARE 82
    - 6.3.1 POPULARITY OF SEAMLESS CGI INTEGRATION THROUGH INTELLIGENT SOFTWARE SOLUTIONS TO PROPEL MARKET GROWTH 82
  - 6.4 RENTAL SERVICES 87
    - 6.4.1 RENTAL SERVICES TO MAXIMIZE CAPITAL EFFICIENCY WITH ON-DEMAND VIRTUAL PRODUCTION ECOSYSTEMS 87
- 7 VIRTUAL PRODUCTION MARKET, BY TYPE 91
  - 7.1 INTRODUCTION 92
  - 7.2 PRE-PRODUCTION 94
    - 7.2.1 BETTER TRANSFORMATION WITH PREDICTIVE VISUALIZATION TO DRIVE MARKET 94
  - 7.3 PRODUCTION 95
    - 7.3.1 INCREASED ACCESSIBILITY DURING PRODUCTION TO DRIVE WORKFLOW INTEGRATION AND CREATIVE PRECISION 95
  - 7.4 POST-PRODUCTION 95
    - 7.4.1 ACCELERATING CONTENT THROUGH REAL-TIME VIRTUAL POST-PRODUCTION WORKFLOWS TO AID GROWTH 95
- 8 VIRTUAL PRODUCTION MARKET, BY END USER 97
  - 8.1 INTRODUCTION 98
  - 8.2 MOVIES 99
    - 8.2.1 INCREASED ADOPTION OF REAL-TIME VFX INTEGRATION FOR FILM PRODUCTION TO BOOST MARKET GROWTH 99
  - 8.3 TELEVISION SERIES 100
    - 8.3.1 TELEVISION SERIES TO ENABLE EFFICIENT AND HIGH-QUALITY PRODUCTION THROUGH VIRTUAL SETS 100
  - 8.4 COMMERCIAL ADVERTISEMENTS 101
    - 8.4.1 COMMERCIAL ADVERTISEMENTS TO USE VIRTUAL PRODUCTION TECHNOLOGIES FOR CREATIVE RESULTS AT LOWER BUDGETS 101
  - 8.5 ONLINE VIDEOS 102
    - 8.5.1 POPULARITY OF ON-DEMAND AND VISUALLY APPEALING CONTENT ACROSS OTT AND SOCIAL MEDIA PLATFORMS TO DRIVE MARKET 102
  - 8.6 OTHER END USERS 103
- 9 VIRTUAL PRODUCTION MARKET, BY REGION 105
  - 9.1 INTRODUCTION 106
  - 9.2 NORTH AMERICA 107
    - 9.2.1 MACROECONOMIC OUTLOOK FOR NORTH AMERICA 110
      - ?
      - 9.2.2 US 110
        - 9.2.2.1 US to dominate North American virtual production market during forecast period 110
        - 9.2.3 CANADA 112
          - 9.2.3.1 Consistent demand for larger virtual production studios to

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spur market growth	112
9.2.4 MEXICO	114
9.2.4.1 Growing popularity of Mexican film and the television industry to boost market	114
9.3 EUROPE	115
9.3.1 MACROECONOMIC OUTLOOK FOR EUROPE	118
9.3.2 UK	119
9.3.2.1 Increased spending on film and high-end television production to propel market growth	119
9.3.3 GERMANY	120
9.3.3.1 Steady growth in German film industry with investments in advanced studio equipment to augment market growth	120
9.3.4 FRANCE	122
9.3.4.1 High investments in French cinema and increased film production to aid market growth	122
9.3.5 REST OF EUROPE	123
9.4 ASIA PACIFIC	125
9.4.1 MACROECONOMIC OUTLOOK FOR ASIA PACIFIC	127
9.4.2 CHINA	128
9.4.2.1 Extensive investments in advanced studio infrastructure and immersive production workflows to drive market	128
9.4.3 JAPAN	129
9.4.3.1 Presence of several top-tier virtual production stages to boost market growth	129
9.4.4 SOUTH KOREA	131
9.4.4.1 South Korea to accelerate focus on virtual production through advanced studios and strategic partnerships	131
9.4.5 INDIA	132
9.4.5.1 Increasing collaborations for new virtual production studios to boost market growth	132
9.4.6 REST OF ASIA PACIFIC	134
9.5 REST OF THE WORLD	136
9.5.1 SOUTH AMERICA	138
9.5.1.1 Expanding film industry and increasing demand for smart stages to boost adoption of virtual production	138
9.5.2 MIDDLE EAST & AFRICA	139
9.5.2.1 Technological innovation, strategic investments, and high demand for immersive content to drive market	139
?	
10 COMPETITIVE LANDSCAPE	142
10.1 INTRODUCTION	142
10.2 MARKET EVALUATION FRAMEWORK	142
10.2.1 PRODUCT PORTFOLIO	143
10.2.2 REGIONAL FOCUS	143
10.2.3 MANUFACTURING FOOTPRINT	143
10.2.4 ORGANIC/INORGANIC STRATEGIES	143
10.3 MARKET SHARE ANALYSIS, 2024	143
10.4 REVENUE ANALYSIS, 2020-2024	145
10.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	146
10.5.1 STARS	146
10.5.2 EMERGING LEADERS	146
10.5.3 PERVASIVE PLAYERS	146
10.5.4 PARTICIPANTS	146
10.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2024	148
10.5.5.1 Company footprint	148

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10.5.5.2	Region footprint	150
10.5.5.3	Offering footprint	151
10.5.5.4	End-user footprint	152
10.6	COMPETITIVE SCENARIO	153
10.6.1	PRODUCT LAUNCHES	153
10.6.2	DEALS	154
11	COMPANY PROFILES	155
11.1	KEY PLAYERS	155
11.1.1	SONY CORPORATION	155
11.1.1.1	Business overview	155
11.1.1.2	Products/Solutions/Services offered	157
11.1.1.3	Recent developments	158
11.1.1.3.1	Product launches	158
11.1.1.3.2	Deals	160
11.1.1.4	MnM view	160
11.1.1.4.1	Right to win	160
11.1.1.4.2	Strategic choices	160
11.1.1.4.3	Weaknesses & competitive threats	160
11.1.2	NEP GROUP, INC.	161
11.1.2.1	Business overview	161
11.1.2.2	Products/Solutions/Services offered	161
11.1.2.3	Recent developments	162
11.1.2.3.1	Product launches	162
11.1.2.3.2	Deals	163
?		
11.1.2.4	MnM view	163
11.1.2.4.1	Right to win	163
11.1.2.4.2	Strategic choices	163
11.1.2.4.3	Weaknesses & competitive threats	164
11.1.3	NIKON CORPORATION	165
11.1.3.1	Business overview	165
11.1.3.2	Products/Solutions/Services offered	167
11.1.3.3	Recent developments	167
11.1.3.3.1	Product launches	167
11.1.3.3.2	Deals	168
11.1.3.4	MnM view	169
11.1.3.4.1	Right to win	169
11.1.3.4.2	Strategic choices	169
11.1.3.4.3	Weaknesses & competitive threats	169
11.1.4	ADOBE	170
11.1.4.1	Business overview	170
11.1.4.2	Products/Solutions/Services offered	172
11.1.4.3	Recent developments	173
11.1.4.3.1	Product launches	173
11.1.4.3.2	Deals	173
11.1.4.4	MnM view	174
11.1.4.4.1	Right to win	174

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11.1.4.4.2	Strategic choices	174
11.1.4.4.3	Weaknesses & competitive threats	174
11.1.5	PRG	175
11.1.5.1	Business overview	175
11.1.5.2	Products/Solutions/Services offered	175
11.1.5.3	Recent developments	176
11.1.5.3.1	Product launches	176
11.1.5.3.2	Deals	177
11.1.5.4	MnM view	177
11.1.5.4.1	Right to win	177
11.1.5.4.2	Strategic choices	177
11.1.5.4.3	Weaknesses & competitive threats	177
11.1.6	ROE VISUAL	178
11.1.6.1	Business overview	178
11.1.6.2	Products/Solutions/Services offered	178
11.1.6.3	Recent developments	179
11.1.6.3.1	Product launches	179
11.1.6.3.2	Deals	181
?		
11.1.7	AUTODESK INC.	182
11.1.7.1	Business overview	182
11.1.7.2	Products/Solutions/Services offered	183
11.1.7.3	Recent developments	185
11.1.7.3.1	Product launches	185
11.1.7.3.2	Deals	186
11.1.8	NVIDIA CORPORATION	187
11.1.8.1	Business overview	187
11.1.8.2	Products/Solutions/Services offered	188
11.1.8.3	Recent developments	189
11.1.8.3.1	Product launches and updates	189
11.1.8.3.2	Deals	190
11.1.9	AOTO ELECTRONICS CO., LTD.	191
11.1.9.1	Business overview	191
11.1.9.2	Products/Solutions/Services offered	192
11.1.9.3	Recent developments	193
11.1.9.3.1	Product launches	193
11.1.9.3.2	Deals	194
11.1.10	EPIC GAMES	195
11.1.10.1	Business overview	195
11.1.10.2	Products/Solutions/Services offered	195
11.1.10.3	Recent developments	196
11.1.10.3.1	Product launches and updates	196
11.1.10.3.2	Deals	197
11.2	OTHER PLAYERS	198
11.2.1	ARRI GMBH	198
11.2.2	TECHNIOLOR GROUP	199
11.2.3	HTC CORPORATION	200

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11.2.4	VICON MOTION SYSTEMS LTD.	201
11.2.5	SIDEX	201
11.2.6	MO-SYS ENGINEERING LTD.	202
11.2.7	PERFORCE	203
11.2.8	DNEG	204
11.2.9	TILTLABS	205
11.2.10	PLANAR SYSTEMS, INC.	206
11.2.11	VIRSABI	207
11.2.12	DIMENSIONS	207
11.2.13	FUSE	208
11.2.14	RECODE XR STUDIO	208
11.2.15	VU TECHNOLOGIES	209
11.2.16	80SIX GROUP LTD.	210
11.2.17	BORIS FX	211
11.2.18	INSTA360	211
11.2.19	360RIZE	212
11.2.20	WETA FX	212
12	APPENDIX	213
12.1	DISCUSSION GUIDE	213
12.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	216
12.3	CUSTOMIZATION OPTIONS	218
12.4	RELATED REPORTS	218
12.5	AUTHOR DETAILS	219

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tel. 0048 603 394 346 e-mail: support@scotts-international.com

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