SCOTTS INTERNATIONAL

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,

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.

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).

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