

Inline Metrology Market by Equipment (CMMS, ODS, Laser Line Scanners, Machine Vision Systems, Multisensor Measuring Systems), Application (Quality Control & Inspection, Reverse Engineering, Assembly Verification) - Global Forecast to 2032

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Report description:

The global inline metrology market is estimated to reach USD 3.80 billion by 2032 from USD 2.63 billion in 2026, registering a CAGR of 6.3%.

<https://mnmimg.marketsandmarkets.com/Images/inline-metrology-market-img-overview.webp>

The market is experiencing steady growth, driven by rising manufacturing complexity, increasing adoption of automation and smart factory initiatives, and the shift toward real-time, production-integrated quality control. Manufacturers across automotive, semiconductor, electronics, and industrial sectors are investing in inline metrology solutions to improve yield, enhance process stability, and support tighter dimensional tolerances at higher throughput. The expansion of electric vehicles, advanced electronics, and high-precision components further increases demand for high-speed, non-contact measurement systems. Advancements in optical sensing, machine vision, multisensor platforms, software analytics, and closed-loop process control are improving measurement accuracy, reducing scrap, and enhancing consistency in high-volume production environments.

"Semiconductor & electronics end-use industry to register the fastest growth throughout forecast period."

The semiconductor & electronics industry is projected to register the fastest growth rate in the inline metrology market during the forecast period, driven by increasing device complexity, shrinking feature sizes, and the expansion of advanced manufacturing nodes. Semiconductor fabs and electronics manufacturers are increasingly deploying inline metrology to enable real-time monitoring of critical dimensions, overlay, thickness, and surface quality during high-volume production. The rapid adoption of advanced packaging, chiplet architectures, AI accelerators, and high-density electronic assemblies further intensifies the need for high-speed, high-precision inline measurement. As yield optimization and process stability become critical competitive factors,

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semiconductor and electronics manufacturers are accelerating investments in inline metrology solutions, making this segment the fastest-growing end-use industry.

"Quality control & inspection application to account for largest market share in 2032."

The quality control & inspection segment is expected to account for the largest share of the inline metrology market, based on application, as manufacturers increasingly embed measurement and inspection directly into production lines. Inline metrology systems are widely used to detect dimensional deviations, surface defects, and process drift in real time, reducing reliance on downstream inspection and manual quality checks. This approach enables early defect detection, improves yield, and minimizes scrap and rework in high-throughput manufacturing environments. As production volumes rise and tolerances become tighter across automotive, semiconductor, and industrial manufacturing, inline quality control and inspection remain the most critical and widely adopted application of inline metrology solutions.

"North America to account for second-largest market share in 2026."

North America is projected to hold the second-largest share of the global inline metrology market in 2026, supported by a strong presence of advanced manufacturing industries, semiconductor fabrication initiatives, and automotive and aerospace production in the region. North America benefits from significant investments in semiconductor manufacturing, electric vehicle production, aerospace systems, and industrial automation, all of which require high-precision, production-integrated measurement solutions. In addition, the presence of leading technology providers and research institutions, along with early adoption of Industry 4.0 practices, supports steady demand for inline metrology. With continued focus on smart manufacturing and domestic production capabilities, North America is expected to maintain a strong position in the inline metrology market.

The break-up of the profile of primary participants in the inline metrology market is as follows:

-□By Company Type: Tier 1 - 35%, Tier 2 - 45%, Tier 3 - 20%

-□By Designation Type: Directors - 35%, Managers - 25%, Others - 40%

-□By Region: Asia Pacific - 40%, Europe - 20%, North America- 30%, Latin America-5%, Middle East & Africa - 5%

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 inline metrology market with a significant global presence include Hexagon AB (Sweden), Carl Zeiss AG (Germany), KLA Corporation (US), KEYENCE CORPORATION (Japan), Renishaw plc (UK), and others.

Research Coverage

The report segments the inline metrology market and forecasts its size by offering, equipment, automation level, application, end-use industry, and region. It also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report covers both qualitative and quantitative aspects of the market.

Reasons to Buy the Report:

The report will help leaders/new entrants in this market by providing approximate revenue figures for the overall inline metrology market and related segments. This report will help stakeholders understand the competitive landscape and gain deeper insights to strengthen their market position and plan effective go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key drivers, restraints, opportunities, and challenges.

The report provides insights into the following pointers:

-□Analysis of key drivers (increasing emphasis on zero-defect and right-first-time manufacturing, inclination toward high-volume and high-precision production, adoption of Industry 4.0 and digital manufacturing frameworks, transition from sampling-based quality control to full inline inspection), restraints (requirement for substantial upfront capital investment, complexities in integrating inline metrology into existing production lines, limited suitability in low-volume or high-mix production with design variability), opportunities (global expansion of semiconductor manufacturing capacity, rising focus on electric vehicle and battery manufacturing, advancements in AI- and ML-enabled metrology software), and challenges (maintaining measurement accuracy at high production speeds, balancing system robustness with measurement sensitivity).

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- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and product/service launches in the inline metrology market
- Market Development: Comprehensive information about lucrative markets by analyzing the inline metrology market across varied regions
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the inline metrology market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players, including Hexagon AB (Sweden), Carl Zeiss AG (Germany), KLA Corporation (US), KEYENCE CORPORATION (Japan), and Renishaw plc (UK), among others.

Table of Contents:

1	INTRODUCTION	29
1.1	STUDY OBJECTIVES	29
1.2	MARKET DEFINITION	30
1.3	MARKET SCOPE	31
1.3.1	MARKET SEGMENTATION AND REGIONAL SCOPE	31
1.3.2	INCLUSIONS AND EXCLUSIONS	32
1.3.3	YEARS CONSIDERED	33
1.4	CURRENCY CONSIDERED	33
1.5	UNIT CONSIDERED	34
1.6	LIMITATIONS	34
1.7	STAKEHOLDERS	34
1.8	SUMMARY OF CHANGES	34
2	EXECUTIVE SUMMARY	36
2.1	MARKET HIGHLIGHTS AND KEY INSIGHTS	36
2.2	KEY MARKET PARTICIPANTS: MAPPING OF STRATEGIC DEVELOPMENTS	37
2.3	DISRUPTIVE TRENDS IN INLINE METROLOGY MARKET	38
2.4	HIGH-GROWTH SEGMENTS	39
2.5	REGIONAL SNAPSHOT: MARKET SIZE, GROWTH RATE, AND FORECAST	40
3	PREMIUM INSIGHTS	42
3.1	OPPORTUNITIES FOR PLAYERS IN INLINE METROLOGY MARKET	42
3.2	INLINE METROLOGY MARKET, BY OFFERING	42
3.3	INLINE METROLOGY MARKET, BY EQUIPMENT	43
3.4	INLINE METROLOGY MARKET, BY AUTOMATION LEVEL	43
3.5	INLINE METROLOGY MARKET, BY APPLICATION	44
3.6	INLINE METROLOGY MARKET IN ASIA PACIFIC, BY END-USE INDUSTRY AND COUNTRY	45
4	MARKET OVERVIEW	46
4.1	INTRODUCTION	46
4.2	MARKET DYNAMICS	46
4.2.1	DRIVERS	47
4.2.1.1	Increasing emphasis on zero-defect and right-first-time manufacturing	47
4.2.1.2	Inclination toward high-volume, high-precision production	48
4.2.1.3	Adoption of Industry 4.0 and digital manufacturing framework	49
4.2.1.4	Transition from sampling-based quality control to full inline inspection	49
	?	
4.2.2	RESTRAINTS	51
4.2.2.1	Requirement for substantial upfront capital investment	51

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4.2.2.2	Complexities associated with integrating inline metrology into existing production lines	51
4.2.2.3	Less suitability of inline metrology in low-volume or high-mix production with design variability	52
4.2.3	OPPORTUNITIES	53
4.2.3.1	Global expansion of semiconductor manufacturing capacity	53
4.2.3.2	Rising focus on expanding electric vehicle and battery manufacturing capacity	53
4.2.3.3	Advancements in AI- and ML-enabled metrology software	54
4.2.4	CHALLENGES	55
4.2.4.1	Maintaining measurement accuracy at high production speeds	55
4.2.4.2	Balancing system robustness with measurement sensitivity	56
4.3	UNMET NEEDS AND WHITE SPACES	57
4.3.1	UNMET NEEDS IN INLINE METROLOGY MARKET	57
4.3.2	WHITE SPACE OPPORTUNITIES	57
4.4	INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES	58
4.4.1	INTERCONNECTED MARKETS	58
4.4.2	CROSS-SECTOR OPPORTUNITIES	59
4.5	STRATEGIC MOVES BY TIER 1/2/3 PLAYERS	60
4.5.1	KEY MOVES AND STRATEGIC FOCUS OF MARKET PLAYERS	60
5	TECHNOLOGICAL ADVANCEMENTS, AI-DRIVEN IMPACT, PATENTS, INNOVATIONS, AND FUTURE APPLICATIONS	61
5.1	KEY EMERGING TECHNOLOGIES	61
5.1.1	INLINE OPTICAL MEASUREMENT AND 3D SCANNING TECHNOLOGIES	61
5.1.2	AI-ENABLED INLINE MACHINE VISION SYSTEMS	61
5.2	COMPLEMENTARY TECHNOLOGIES	61
5.2.1	MULTISENSOR AND HYBRID INLINE METROLOGY PLATFORMS	61
5.2.2	ADVANCED SOFTWARE, ANALYTICS, AND SPC INTEGRATION	61
5.3	ADJACENT TECHNOLOGIES	62
5.3.1	PROBE INDUSTRIAL AUTOMATION, ROBOTICS, AND PRODUCTION LINE INTEGRATION	62
5.3.2	DIGITAL TWINS AND SMART MANUFACTURING PLATFORMS	62
5.4	TECHNOLOGY/PRODUCT ROADMAP	62
5.4.1	SHORT-TERM (2025-2027): HIGH-SPEED AUTOMATION, AI VISION, & PRODUCTION INTEGRATION	62
5.4.2	MID-TERM (2027-2030): MULTI-SENSOR PLATFORMS, CLOSED-LOOP CONTROL & SMART FACTORIES	63
5.4.3	LONG-TERM (2030-2035+): AUTONOMOUS INSPECTION, DIGITAL TWINS, & SYSTEM-LEVEL CONVERGENCE	64
5.5	PATENT ANALYSIS	65
?		
5.6	FUTURE APPLICATIONS	67
5.7	IMPACT OF AI ON INLINE METROLOGY	68
5.7.1	TOP USE CASES AND MARKET POTENTIAL	68
5.7.2	BEST PRACTICES RELATED TO AI IMPLEMENTATION IN INLINE METROLOGY MARKET	69
5.7.3	CASE STUDIES OF AI IMPLEMENTATION IN INLINE METROLOGY MARKET	69
5.7.4	INTERCONNECTED/ADJACENT ECOSYSTEM AND IMPACT ON MARKET PLAYERS	70
5.7.5	CLIENTS' READINESS TO ADOPT AI IN INLINE METROLOGY MARKET	70
6	CUSTOMER LANDSCAPE AND BUYER BEHAVIOR	71
6.1	DECISION-MAKING PROCESS	71
6.2	KEY STAKEHOLDERS INVOLVED IN BUYING PROCESS AND THEIR EVALUATION CRITERIA	73
6.2.1	KEY STAKEHOLDERS IN BUYING PROCESS	73
6.2.2	BUYING CRITERIA	74
6.3	ADOPTION BARRIERS AND INTERNAL CHALLENGES	75
6.4	UNMET NEEDS OF VARIOUS END-USE INDUSTRIES	76

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6.5	MARKET PROFITABILITY	77
6.5.1	REVENUE POTENTIAL	77
6.5.2	COST DYNAMICS	78
6.5.3	MARGIN OPPORTUNITIES, BY APPLICATION	78
7	REGULATORY LANDSCAPE	79
7.1	INTRODUCTION	79
7.1.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	79
7.1.2	INDUSTRY STANDARDS	84
7.1.3	SUSTAINABILITY INITIATIVES	86
7.1.4	SUSTAINABILITY IMPACT AND REGULATORY POLICY INITIATIVES	87
7.1.5	CERTIFICATIONS, LABELING, AND ECO-STANDARDS	87
8	INDUSTRY TRENDS	89
8.1	INTRODUCTION	89
8.2	PORTER'S FIVE FORCES ANALYSIS	89
8.2.1	INTENSITY OF COMPETITIVE RIVALRY	91
8.2.2	BARGAINING POWER OF SUPPLIERS	91
8.2.3	BARGAINING POWER OF BUYERS	91
8.2.4	THREAT OF NEW ENTRANTS	91
8.2.5	THREAT OF SUBSTITUTES	92
8.3	MACROECONOMIC OUTLOOK	92
8.3.1	INTRODUCTION	92
8.3.2	GDP TRENDS AND FORECAST	92
?		
8.3.3	TRENDS IN GLOBAL METROLOGY INDUSTRY	94
8.3.4	TRENDS IN GLOBAL INLINE METROLOGY INDUSTRY	94
8.4	SUPPLY CHAIN ANALYSIS	95
8.5	ECOSYSTEM ANALYSIS	97
8.6	PRICING ANALYSIS	98
8.6.1	PRICING RANGE OF INLINE METROLOGY EQUIPMENT, BY KEY PLAYER, 2025	98
8.6.2	AVERAGE SELLING PRICE TREND OF INLINE METROLOGY EQUIPMENT, BY TYPE, 2023-2025	99
8.6.3	AVERAGE SELLING PRICE TREND OF INLINE METROLOGY EQUIPMENT, BY REGION, 2023-2025	100
8.7	TRADE ANALYSIS	101
8.7.1	IMPORT SCENARIO (HS CODE 903180)	101
8.7.2	EXPORT SCENARIO (HS CODE 903180)	102
8.8	KEY CONFERENCES AND EVENTS, 2026-2027	103
8.9	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	104
8.10	INVESTMENT AND FUNDING SCENARIO, 2021-2025	106
8.11	CASE STUDY ANALYSIS	106
8.11.1	AUTOMATED OPTICAL METROLOGY DEPLOYMENT TO SCALE INLINE MEASUREMENT AND DIGITAL INSPECTION CAPACITY AT SKODA AUTO	106
8.11.2	CMM INTEGRATION BY BENTELER AUTOMOTIVE FOR FULLY AUTOMATED IN-LINE 3D MEASUREMENT OF CHASSIS COMPONENTS	107
8.11.3	TEMPO TECHNOLOGY ADOPTION FOR FASTER INSPECTION PROCESS AT ALLOY SPECIALTIES	107
8.11.4	ROBOTIC INLINE CT METROLOGY IMPLEMENTATION BY BMW FOR REAL-TIME IDENTIFICATION OF DEFECTIVE COMPONENTS	108

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- 8.11.5 □NON-CONTACT METROLOGY SOLUTION DEPLOYMENT BY FORD TO MONITOR GEAR SURFACE PROCESSING □108
 - 8.12 □IMPACT OF 2025 US TARIFF ON INLINE METROLOGY MARKET □109
 - 8.12.1 □INTRODUCTION □109
 - 8.12.2 □KEY TARIFF RATES □109
 - 8.12.3 □PRICE IMPACT ANALYSIS □110
 - 8.12.4 □IMPACT ON COUNTRIES/REGIONS □111
 - 8.12.4.1 □US □111
 - 8.12.4.2 □Europe □111
 - 8.12.4.3 □Asia Pacific □112
 - 8.12.5 □IMPACT ON END-USE INDUSTRIES □112
 - 9 □INLINE METROLOGY MARKET, BY OFFERING □113
 - 9.1 □INTRODUCTION □114
 - 9.2 □EQUIPMENT □115
 - 9.2.1 □INCREASING FOCUS OF MANUFACTURERS ON HIGH-VOLUME PRODUCTION WITH MINIMAL REWORK TO ACCELERATE DEMAND □115
 - ?
 - 9.3 □SOFTWARE □118
 - 9.3.1 □DATA ACQUISITION SOFTWARE □120
 - 9.3.1.1 □Ability to detect dimensional deviations and process drift without interrupting production to boost demand □120
 - 9.3.2 □ANALYSIS SOFTWARE □120
 - 9.3.2.1 □Pressing need for real-time interpretation of inline measurement data in automated manufacturing to spike adoption □120
 - 9.3.3 □STATISTICAL PROCESS CONTROL SOFTWARE □121
 - 9.3.3.1 □Potential to identify process drift and variation at early stage to elevate demand □121
 - 9.3.4 □CAD INTEGRATION SOFTWARE □121
 - 9.3.4.1 □Necessity for design-to-production feedback in automated manufacturing to drive segmental growth □121
 - 9.3.5 □OTHER SOFTWARE TYPES □122
 - 9.4 □SERVICES □122
 - 9.4.1 □INSTALLATION SERVICES □124
 - 9.4.1.1 □Need to ensure pre-operational synchronization in production lines to spur demand □124
 - 9.4.2 □CALIBRATION SERVICES □125
 - 9.4.2.1 □Necessity for measurement accuracy and consistency in continuous inline operations to fuel segmental growth □125
 - 9.4.3 □TRAINING SERVICES □125
 - 9.4.3.1 □Focus on reducing dependency on external support and improving response times to quality issues to propel market □125
 - 9.4.4 □MAINTENANCE SERVICES □126
 - 9.4.4.1 □Inclination toward mitigating risks associated with component wear, sensor degradation, and alignment drift to support demand □126
 - 9.4.5 □OTHER SERVICE TYPES □126
- 10 □INLINE METROLOGY MARKET, BY AUTOMATION LEVEL □127
 - 10.1 □INTRODUCTION □128
 - 10.2 □FULLY AUTOMATED □129
 - 10.2.1 □INCREASING FOCUS ON HIGH-VOLUME AND ZERO-DEFECT MANUFACTURING TO SPIKE DEMAND □129
 - 10.3 □SEMI-AUTOMATED □130
 - 10.3.1 □EMPHASIS ON BALANCING INSPECTION EFFICIENCY AND CAPITAL EXPENDITURE TO BOOST DEMAND □130
- 11 □INLINE METROLOGY MARKET, BY APPLICATION □131
 - 11.1 □INTRODUCTION □132
 - 11.2 □QUALITY CONTROL & INSPECTION □133
 - 11.2.1 □RISING ADOPTION IN HIGH-VOLUME AUTOMOTIVE AND ELECTRONICS MANUFACTURING TO ACCELERATE SEGMENTAL

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- GROWTH 133
- 11.2.2 DIMENSIONAL INSPECTION 134
- 11.2.3 SURFACE INSPECTION 135
- 11.2.4 DEFECT DETECTION 135
- 11.3 REVERSE ENGINEERING 136
- 11.3.1 USE OF INLINE METROLOGY FOR GEOMETRY CAPTURE AND DESIGN VALIDATION TO DRIVE MARKET 136
- 11.4 ASSEMBLY VERIFICATION 137
- 11.4.1 FOCUS ON MAINTAINING CONSISTENT ASSEMBLY QUALITY ALONG WITH HIGH-THROUGHPUT PRODUCTION TO FUEL SEGMENTAL GROWTH 137
- 11.5 OTHER APPLICATIONS 139
- 12 INLINE METROLOGY MARKET, BY END-USE INDUSTRY 141
- 12.1 INTRODUCTION 142
- 12.2 AEROSPACE & DEFENSE 144
- 12.2.1 STRINGENT QUALITY REQUIREMENTS AND COMPONENT COMPLEXITY TO DRIVE INLINE METROLOGY ADOPTION 144
- 12.3 AUTOMOTIVE 148
- 12.3.1 HIGH PRODUCTION VOLUMES, TIGHT DIMENSIONAL TOLERANCES, AND STRINGENT QUALITY REQUIREMENTS TO SPUR DEMAND 148
- 12.4 MEDICAL DEVICES 152
- 12.4.1 STRICT REGULATIONS AND PRECISION REQUIREMENTS TO SPUR INLINE METROLOGY DEMAND 152
- 12.5 SEMICONDUCTOR & ELECTRONICS 156
- 12.5.1 USE OF HIGH-SPEED OPTICAL AND INSPECTION SYSTEMS FOR DEFECT DETECTION AND PATTERN VERIFICATION TO SUPPORT MARKET GROWTH 156
- 12.6 ENERGY & POWER 160
- 12.6.1 GROWING IMPORTANCE OF INLINE METROLOGY IN WIND ENERGY COMPONENT MANUFACTURING TO FOSTER MARKET GROWTH 160
- 12.7 HEAVY MACHINERY 165
- 12.7.1 PROFICIENCY IN VERIFYING GEOMETRY AND ALIGNMENT IN HEAVY MACHINERY COMPONENTS TO DRIVE INLINE METROLOGY ADOPTION 165
- 12.8 OTHER END-USE INDUSTRIES 169
- 12.8.1 ARCHITECTURE & CONSTRUCTION 172
- 12.8.2 RESEARCH 173
- 12.8.3 METALS & MINING 173
- 12.8.4 FOOD & BEVERAGES 173
- 12.8.5 GLASS & CERAMICS 173
- 12.8.6 PLASTICS & POLYMERS 173
- 13 INLINE METROLOGY MARKET, BY EQUIPMENT 174
- 13.1 INTRODUCTION 175
- 13.2 COORDINATE MEASURING MACHINES (CMMS) 177
- 13.2.1 ROBUSTNESS, THERMAL STABILITY, AND HIGHER MEASUREMENT THROUGHPUT FEATURES TO DRIVE ADOPTION 177
- 13.2.2 BRIDGE CMMS 179
- 13.2.3 GANTRY CMMS 180
- ?
- 13.3 OPTICAL DIGITIZERS & SCANNERS (ODS) 180
- 13.3.1 ABILITY TO INSPECT DELICATE, COMPLEX, AND FREE-FORM COMPONENTS WITHOUT PHYSICAL CONTACT TO AUGMENT DEMAND 180
- 13.3.2 LASER LINE SCANNERS (LLS) 183
- 13.3.2.1 Growing demand for high-speed surface inspection in automated production environments to boost segmental growth 183

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- 13.3.3 STRUCTURED LIGHT SCANNERS (SLS) 183
- 13.3.3.1 Rising demand for full-field 3D inspection of complex geometries to drive segmental growth 183
- 13.3.4 LASER TRACKERS 184
- 13.3.4.1 Need for high-accuracy measurement of large-scale components in production process to create opportunities 184
- 13.3.5 OTHER ODS TYPES 184
- 13.4 MACHINE VISION SYSTEMS 184
- 13.4.1 POTENTIAL FOR SCALABLE, DATA-DRIVEN, AND REAL-TIME INSPECTION ACROSS MANUFACTURING OPERATIONS TO FOSTER ADOPTION 184
- 13.5 MULTISENSOR MEASURING SYSTEMS 186
- 13.5.1 RISING DEMAND FOR UNIFIED MEASUREMENT PLATFORMS TO PROPEL SEGMENTAL GROWTH 186
- 13.6 X-RAY & COMPUTED TOMOGRAPHY (CT) SYSTEMS 189
- 13.6.1 PROFICIENCY IN OFFERING DEEPER INSIGHT INTO INTERNAL QUALITY AND STRUCTURAL INTEGRITY TO SPUR DEMAND 189
- 13.7 OTHER EQUIPMENT 191
- 14 INLINE METROLOGY MARKET, BY REGION 194
- 14.1 INTRODUCTION 195
- 14.2 ASIA PACIFIC 196
- 14.2.1 CHINA 199
- 14.2.1.1 Strategic investment in automated manufacturing to spike demand 199
- 14.2.2 JAPAN 200
- 14.2.2.1 Rising adoption of smart manufacturing practices focused on reliability and repeatability to fuel market growth 200
- 14.2.3 INDIA 200
- 14.2.3.1 Increasing investments in semiconductor fabrication and advanced packaging to create growth opportunities 200
- 14.2.4 SOUTH KOREA 201
- 14.2.4.1 Strong focus on ensuring process stability across high-volume semiconductor production lines to boost adoption 201
- 14.2.5 AUSTRALIA 202
- 14.2.5.1 Growing activity in defense manufacturing, advanced materials, and high-value industrial production to support market growth 202
- 14.2.6 SOUTHEAST ASIA 202
- 14.2.6.1 Increasing automation in vehicle assembly and component production to create lucrative opportunities 202
- 14.2.7 REST OF ASIA PACIFIC 203
- ?
- 14.3 NORTH AMERICA 203
- 14.3.1 US 206
- 14.3.1.1 Strong emphasis of manufacturing firms on process control and quality assurance to accelerate demand 206
- 14.3.2 CANADA 206
- 14.3.2.1 Aerospace, automotive, and industrial machinery sectors to contribute most to market growth 206
- 14.4 EUROPE 207
- 14.4.1 GERMANY 210
- 14.4.1.1 Significant presence of leading global metrology equipment suppliers to expedite market growth 210
- 14.4.2 UK 210
- 14.4.2.1 Stringent quality and certification requirements in aerospace sector to propel market 210
- 14.4.3 FRANCE 211
- 14.4.3.1 Revolutionizing automotive manufacturing processes to augment market growth 211
- 14.4.4 ITALY 212
- 14.4.4.1 Increasing manufacturing of premium and performance-oriented vehicles to facilitate market growth 212
- 14.4.5 SPAIN 212
- 14.4.5.1 Strong base of suppliers of automotive components and high-volume assembly plants to drive market 212

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- 14.4.6 POLAND 213
- 14.4.6.1 Automotive, electronics, and industrial manufacturing sectors to be key enablers of market traction 213
- 14.4.7 NORDICS 213
- 14.4.7.1 Rising use of inline inspection systems in precision manufacturing and equipment assembly processes to drive market 213
- 14.4.8 REST OF EUROPE 214
- 14.5 LATIN AMERICA 215
- 14.5.1 BRAZIL 217
- 14.5.1.1 Surging demand from automotive and aerospace industries to foster market growth 217
- 14.5.2 ARGENTINA 217
- 14.5.2.1 Growing focus of vehicle manufacturers on export markets to boost adoption 217
- 14.5.3 MEXICO 218
- 14.5.3.1 Strong electronics manufacturing base to create potential for market growth 218
- 14.5.4 REST OF LATIN AMERICA 218
- 14.6 MIDDLE EAST & AFRICA 218
- 14.6.1 GCC 221
- 14.6.1.1 Saudi Arabia 222
- 14.6.1.1.1 Development of advanced industrial clusters to create scalable opportunities 222
- 14.6.1.2 UAE 222
- 14.6.1.2.1 Strong focus on industrial diversification and export-oriented production to enable market expansion 222
- 14.6.1.3 Rest of GCC 223
- 14.6.2 SOUTH AFRICA 223
- 14.6.2.1 Presence of automotive OEMs to unlock growth potential 223
- 14.6.3 REST OF MIDDLE EAST & AFRICA 223
- 15 COMPETITIVE LANDSCAPE 225
- 15.1 OVERVIEW 225
- 15.2 KEY PLAYER COMPETITIVE STRATEGIES/RIGHT TO WIN, 2022-2025 225
- 15.3 MARKET SHARE ANALYSIS, 2025 227
- 15.4 REVENUE ANALYSIS, 2020-2024 228
- 15.5 COMPANY VALUATION AND FINANCIAL METRICS 229
- 15.5.1 INLINE METROLOGY MARKET: COMPANY VALUATION 229
- 15.5.2 INLINE METROLOGY MARKET: FINANCIAL METRICS 229
- 15.6 BRAND COMPARISON 230
- 15.6.1 HEXAGON AB (SWEDEN) 230
- 15.6.2 CARL ZEISS AG (GERMANY) 230
- 15.6.3 KLA CORPORATION (US) 231
- 15.6.4 KEYENCE CORPORATION (JAPAN) 231
- 15.6.5 RENISHAW PLC (UK) 231
- 15.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2025 231
- 15.7.1 STARS 231
- 15.7.2 EMERGING LEADERS 231
- 15.7.3 PERVASIVE PLAYERS 232
- 15.7.4 PARTICIPANTS 232
- 15.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2025 234
- 15.7.5.1 Company footprint 234
- 15.7.5.2 Region footprint 235
- 15.7.5.3 Offering footprint 236
- 15.7.5.4 Equipment footprint 237

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15.7.5.5	Application footprint	238
15.7.5.6	End-use industry footprint	240
15.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2025	241
15.8.1	PROGRESSIVE COMPANIES	241
15.8.2	RESPONSIVE COMPANIES	241
15.8.3	DYNAMIC COMPANIES	241
15.8.4	STARTING BLOCKS	241
15.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2025	243
15.8.5.1	Inline metrology market: List of key startups/SMEs	243
15.8.5.2	Inline metrology market: Competitive benchmarking of key startups/SMEs	243
15.9	COMPETITIVE SCENARIO	244
15.9.1	PRODUCT LAUNCHES	244
15.9.2	DEALS	246
16	COMPANY PROFILES	250
16.1	KEY PLAYERS	250
16.1.1	HEXAGON AB	250
16.1.1.1	Business overview	250
16.1.1.2	Products/Solutions/Services offered	252
16.1.1.3	Recent developments	254
16.1.1.3.1	Product launches	254
16.1.1.3.2	Deals	256
16.1.1.4	MnM view	257
16.1.1.4.1	Key strengths/Right to win	257
16.1.1.4.2	Strategic choices	258
16.1.1.4.3	Weaknesses/Competitive threats	258
16.1.2	CARL ZEISS AG	259
16.1.2.1	Business overview	259
16.1.2.2	Products/Solutions/Services offered	260
16.1.2.3	Recent developments	261
16.1.2.3.1	Product launches	261
16.1.2.3.2	Deals	263
16.1.2.4	MnM view	263
16.1.2.4.1	Key strengths/Right to win	263
16.1.2.4.2	Strategic choices	264
16.1.2.4.3	Weaknesses/Competitive threats	264
16.1.3	KLA CORPORATION	265
16.1.3.1	Business overview	265
16.1.3.2	Products/Solutions/Services offered	266
16.1.3.3	Recent developments	268
16.1.3.3.1	Product launches	268
16.1.3.4	MnM view	268
16.1.3.4.1	Key strengths/Right to win	268
16.1.3.4.2	Strategic choices	268
16.1.3.4.3	Weaknesses/Competitive threats	269
16.1.4	KEYENCE CORPORATION	270
16.1.4.1	Business overview	270
16.1.4.2	Products/Solutions/Services offered	271

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16.1.4.3	Recent developments	272
16.1.4.3.1	Product launches	272
?		
16.1.4.4	MnM view	273
16.1.4.4.1	Key strengths/Right to win	273
16.1.4.4.2	Strategic choices	273
16.1.4.4.3	Weaknesses/Competitive threats	273
16.1.5	RENISHAW PLC	274
16.1.5.1	Business overview	274
16.1.5.2	Products/Solutions/Services offered	275
16.1.5.3	Recent developments	276
16.1.5.3.1	Product launches	276
16.1.5.3.2	Deals	278
16.1.5.4	MnM view	279
16.1.5.4.1	Key strengths/Right to win	279
16.1.5.4.2	Strategic choices	279
16.1.5.4.3	Weaknesses/Competitive threats	279
16.1.6	MITUTOYO CORPORATION	280
16.1.6.1	Business overview	280
16.1.6.2	Products/Solutions/Services offered	280
16.1.6.3	Recent developments	281
16.1.6.3.1	Product launches	281
16.1.7	NIKON CORPORATION	283
16.1.7.1	Business overview	283
16.1.7.2	Products/Solutions/Services offered	285
16.1.7.3	Recent developments	286
16.1.7.3.1	Product launches	286
16.1.7.3.2	Deals	288
16.1.8	FARO	289
16.1.8.1	Business overview	289
16.1.8.2	Products/Solutions/Services offered	290
16.1.8.3	Recent developments	290
16.1.8.3.1	Product launches	290
16.1.8.3.2	Deals	292
16.1.9	ENOPTIK	293
16.1.9.1	Business overview	293
16.1.9.2	Products/Solutions/Services offered	295
16.1.9.3	Recent developments	295
16.1.9.3.1	Product launches	295
16.1.9.3.2	Deals	296
16.1.9.3.3	Other developments	296
16.1.10	CREAFORM	297
16.1.10.1	Business overview	297
16.1.10.2	Products/Solutions/Services offered	297
?		
16.1.10.3	Recent developments	298
16.1.10.3.1	Product launches	298

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16.1.10.3.2	Deals	300
16.1.10.3.3	Expansions	301
16.2	OTHER PLAYERS	302
16.2.1	COGNEX CORPORATION	302
16.2.2	ACCUSCAN	303
16.2.3	BAKER HUGHES COMPANY	304
16.2.4	NORDSON CORPORATION	305
16.2.5	ATT METROLOGY SOLUTIONS	306
16.2.6	SGS SOCIETE GENERALE DE SURVEILLANCE SA	307
16.2.7	AUTOMATED PRECISION INC (API)	308
16.2.8	APPLIED MATERIALS, INC.	309
16.2.9	PERCEPTRON, INC.	310
16.2.10	SHINING 3D	311
16.2.11	INTERTEK GROUP PLC	312
16.2.12	BRUKER	313
16.2.13	MICRO-EPSILON	314
16.2.14	BASLER AG	315
16.2.15	METROLOGIC GROUP	316
16.2.16	INNOVMETRIC SOFTWARE INC.	317
16.2.17	SMARTRAY GMBH	318
16.2.18	WENZEL GROUP	319
16.2.19	SCANTECH (HANGZHOU) CO., LTD.	320
16.2.20	POLYGA INC.	321
17	RESEARCH METHODOLOGY	322
17.1	RESEARCH DATA	322
17.1.1	SECONDARY AND PRIMARY RESEARCH	324
17.1.2	SECONDARY DATA	324
17.1.2.1	Key data from secondary sources	325
17.1.2.2	List of key secondary sources	325
17.1.3	PRIMARY DATA	325
17.1.3.1	List of primary interview participants	326
17.1.3.2	Key data from primary sources	327
17.1.3.3	Key industry insights	327
17.1.3.4	Breakdown of primaries	328
17.2	MARKET SIZE ESTIMATION	328
17.2.1	BOTTOM-UP APPROACH	328
17.2.1.1	Approach to arrive at market size using bottom-up analysis (demand side)	328
	?	
17.2.2	TOP-DOWN APPROACH	330
17.2.2.1	Approach to arrive at market size using top-down analysis (supply side)	330
17.3	DATA TRIANGULATION	331
17.4	RESEARCH ASSUMPTIONS	332
17.5	GROWTH PROJECTION AND FORECAST-RELATED ASSUMPTIONS	332
17.6	RESEARCH LIMITATIONS	333
17.7	RISK ANALYSIS	333

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18 APPENDIX 334

18.1 DISCUSSION GUIDE 334

18.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 337

18.3 CUSTOMIZATION OPTIONS 339

18.4 RELATED REPORTS 339

18.5 AUTHOR DETAILS 340

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