

ROBOTICS

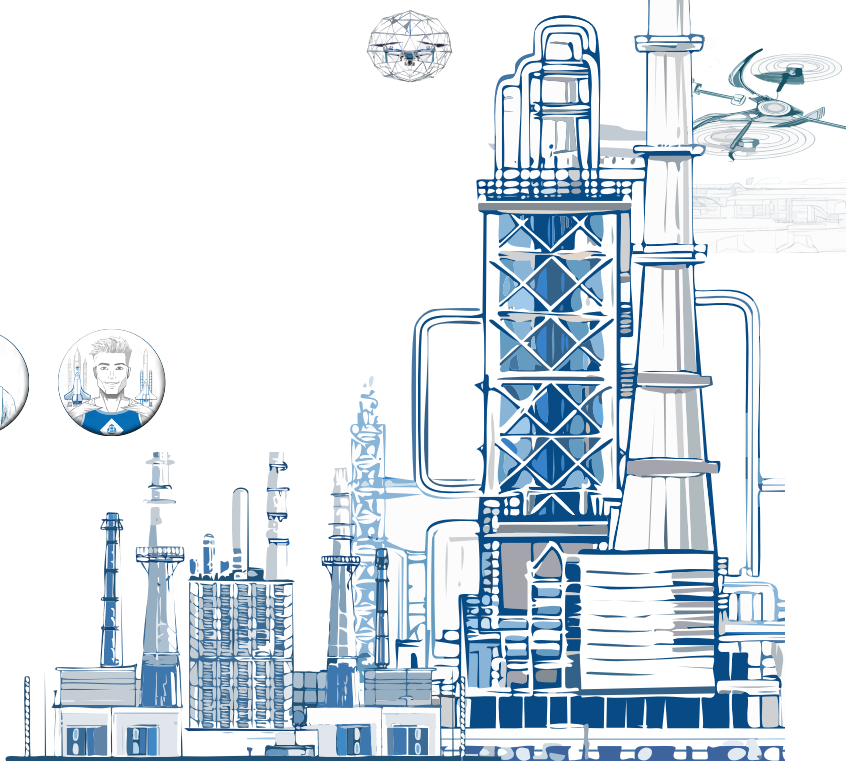
INSPECTION & MAINTENANCE



This report was prepared for



2025



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WHAT SHOULD WE SEEK

2025
intelligence is now abundant.

250 years ago, the industrial revolution changed society by making human labor abundant, it transformed nature into a servant and time became a commodity. Humanity began asking: "What should we seek in a world where everything is available?"

25 years ago, the internet revolution changed society again by making information abundant. Decoupled from physical limits, information became a river in constant flow, rather than a static well to be drawn from. Humanity was asking again: "What should we seek in a world where everything is available?"

2.5 years ago, the AI revolution started to change society again by making intelligence abundant, decoupling knowledge from human minds. This new abundance is not merely a further expansion of human capacity—as previous revolutions were—it marks a shift in the very meaning of intelligence.

Intelligence is no longer something we develop through effort, failure, and discovery. It is on-demand, outsourced, and automated. We face a paradox: the more abundant intelligence becomes, the less we seem to need our own.

And so, humanity must ask itself yet again:

"What should we seek in a world where everything is available?"

SCALEBOOK

ROBOTICS
INSPECTION &
MAINTENANCE

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INDUSTRIAL SECTORS

- Aviation
- Oil & Gas
- Power & Utilities
- Maritime
- Automotive
- Chemicals
- Manufacturing
- Infrastructure

TECHNOLOGY LANDSCAPE

- Drones (UAVs) for Inspection
- Underwater ROVs & Subsea Robots
- Legged Robots (Quadruped & Humanoids)
- Stationary / Teleoperated Manipulators
- Robotic Software & Digital Twins
- Climbing Robots (Magnetic / Suction)
- Ground-Based Wheeled & Tracked Robots
- Pipe-Crawling & Pipeline Inspection Robots

REGIONAL AND SECTOR INSIGHTS

- Regional Deep Dives
- Industrial Service Providers
- Standards and Safety
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CHALLENGES AND CONSIDERATIONS

STRATEGIC RECOMMENDATIONS

OUTLOOK

WHY READ THIS

The above reflection on the AI revolution and intelligence abundance carries profound meaning for every individual and every business. Companies will struggle not because they lack solutions but because they are overwhelmed with options and complexity. Recognizing this challenge, we are setting out to provide a vital, differentiating service: clarity, direction and experience in a world of limitless choices.

With this report you get a thorough understanding of the Inspection & Maintenance Robotics ecosystem. Not only providing facts and figures, but we also concentrate on actionable insights, real world business examples and a thorough understanding of perspectives of different market participants.

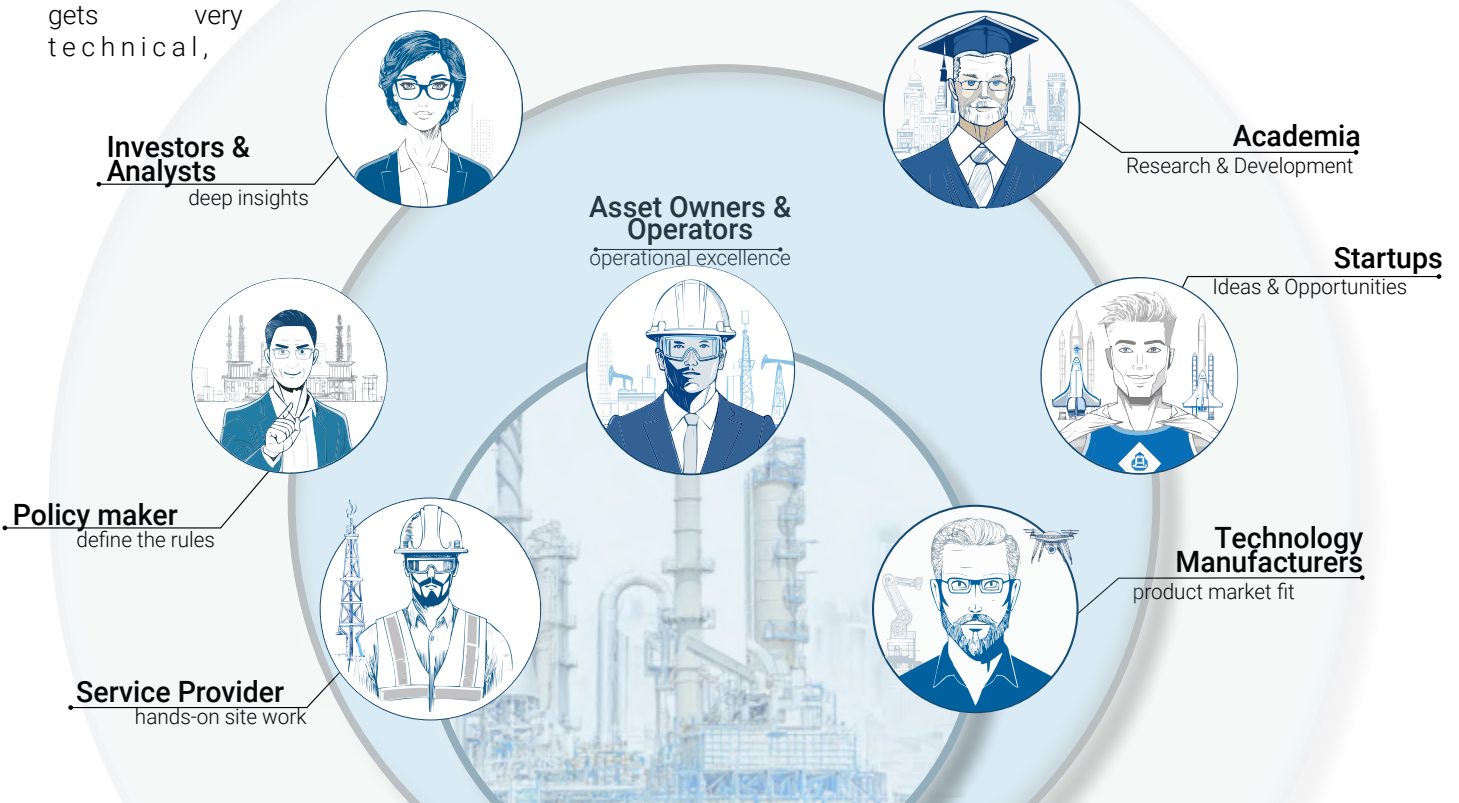
MAXimum
INSIGHT
per
minute
of
reading

WHO THIS IS FOR

Even though, or because, the robotics inspection and maintenance market is still very niche, there is a lot of players shaping and directing. We address all key contributors, from startups and university spinoffs, over industrial service providers to global asset operators. Tech companies that are developing the technology to individuals and corporations seeking guidance on how to enhance productivity and applying technology. In some parts the report gets very technical,

which requires the reader to have certain engineering understanding. No worries, if you don't know what an Ultrasonic wave is or never heard of Lidar. If it is needed to understand a use case or a differentiator, we will explain the details necessary.

If you identify yourself as one of the below, we have marked sections with your associated pictogram to immediately spot where you can benefit most.



THE OCEAN OF MARKET INTELLIGENCE

Imagine the market as a vast ocean, full of insights waiting to be captured. We are the fishermen. Different creatures and elements of the ocean symbolize various data sources—each with its own accessibility, reliability, and depth.

If we assume nearly every aspect of market and business intelligence is publicly accessible and often first shared on the internet the challenge is not finding data, it is making sense of it.

We leverage advanced AI models (from OpenAI, Google, Anthropic, and powerful open-source alternatives like DeepSeek) trained on carefully curated industry data sources to track and interpret the full landscape of Inspection and Maintenance Robotics.

YouTube and Co

With 500+ hours of video uploaded per minute and 1B+ hours watched daily, YouTube provides a massive, visual repository of product demos, industry analysis, and expert opinions.

Podcasts & Speeches

Over 500 million monthly listeners tap into industry podcasts, providing expert interviews and trend analysis.

Webinars & Industry Events

Thousands of monthly B2B webinars and industry events deliver real-time market feedback, product launch details, and emerging trends directly from industry frontrunners.

LinkedIn & other Professional Networks

Over 1 billion members, 70+ million businesses, and 400M+ monthly active professionals generate real-time industry discussions and posts hourly, offering dynamic market sentiment.

Industry Expert Network

Proprietary research and a strong expert network provide qualitative validation and nuanced interpretations, enriching data-driven analysis with deep industry understanding.

Paid Market Data

The IFR reported a record 553,052 new robot installations in 2023 (27% growth). Combined with paid market reports, this provides validated deployment figures and granular market segmentation.

Patent Data Analysis

Monitoring ~3.5 million annual global patent filings via databases like Google Patents reveals emerging technologies and new entrants in the robotics space early on.

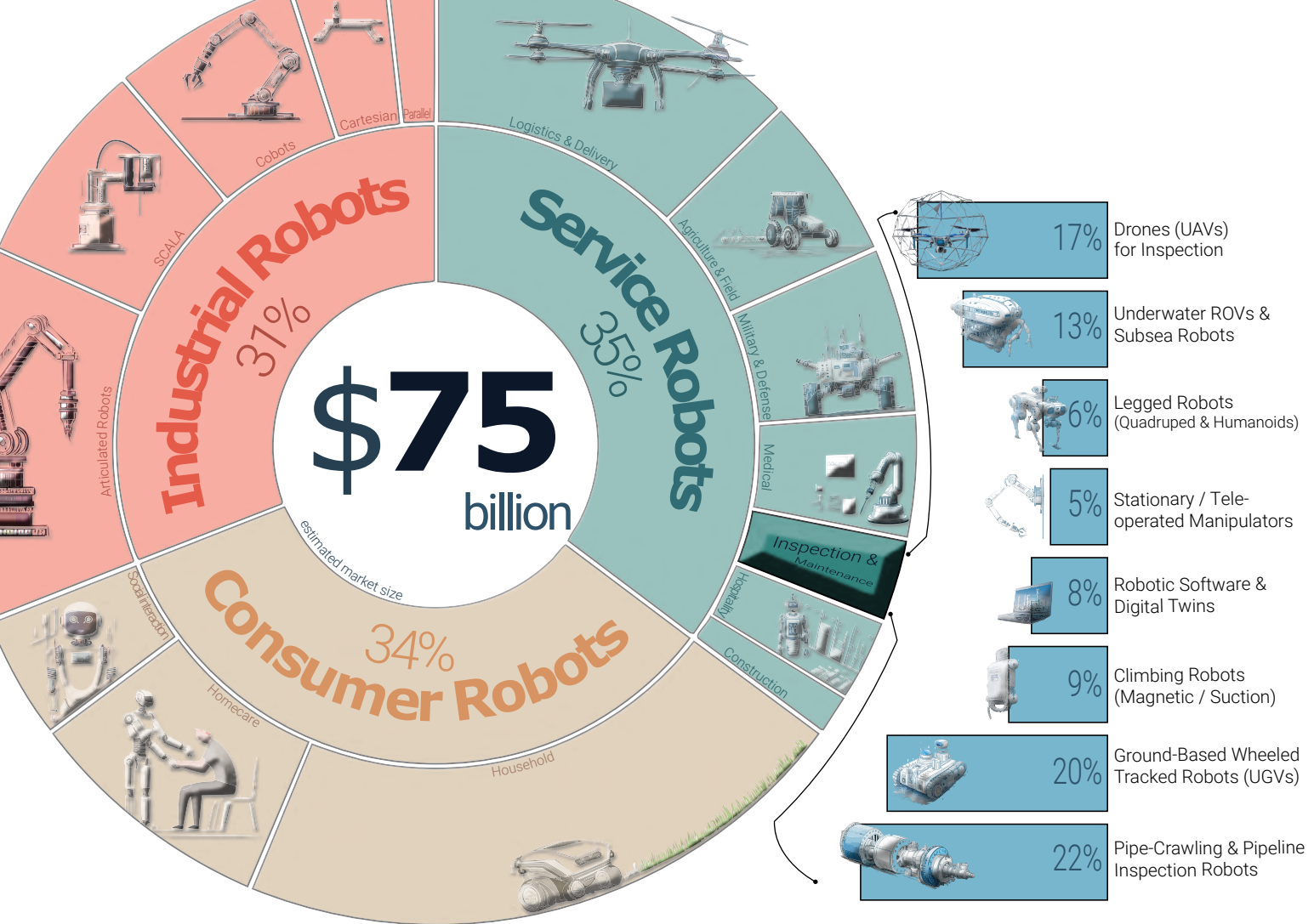
Breaking Trends >

public sentiment >

< Historical Data

< Structured Insights

Critical insights are scattered across many channels and varying depth.



MARKET OVERVIEW

Industrial robots

\$23B | 14% CAGR | \$50B by 2030

backbone of global manufacturing, driven by workforce shortages, rising labor costs, and productivity demands. Companies worldwide, particularly in automotive and electronics sectors, increasingly rely on robotic arms, collaborative "cobots," and AI-powered automation systems to handle repetitive and precise tasks efficiently. As factories become smarter through predictive maintenance and real-time data analytics, industrial robotics is positioned for **steady growth**, making it a stable and compelling area for **innovation paired with economic necessity**.

Consumer robots

\$25.5B | 25% CAGR | \$100B by 2030

moving beyond novelty into **everyday essentials** and transforming households worldwide. Robot vacuums, lawnmowers, and personal assistants automate chores, driven by busy lifestyles and an aging population. AI-driven technologies like advanced navigation and voice recognition enhance their functionality, affordability, and convenience. With integration into smart homes, consumer robots represent the **fastest-growing robotics segment**, offering substantial opportunities as automation becomes **increasingly mainstream and accessible** to everyday consumers.

Service robots

\$26.5B | 20% CAGR | \$90B by 2030

fast-growing sector, rapidly entering logistics, healthcare, agriculture, public services and industrial inspection. Driven by global labor shortages and demand for efficiency, robots perform tasks ranging from warehouse operations to surgical assistance, and even hospitality. **AI advancements** enable robots to handle complex, dynamic tasks, further boosting their adoption. **Significant expansion expected** over the coming years, especially in logistics and medical fields, service robotics presents investors an opportunity tied directly to essential, real-world needs and significant economic shifts.

Each of the three robotics sectors – industrial, consumer, and service – is propelled by strong market fundamentals and transformative trends. Workforce demographics, AI breakthroughs, and the push for efficiency are creating a ripe environment for robotics across the board.

WHY SIZE IS NOT SIZE

The robotics market for inspection and maintenance has experienced significant expansion across industries over the past decade, though reliable market size estimates remain elusive due to overlapping applications and inconsistent categorization.

Our research into the robotics market, particularly the Professional Service Robots segment, revealed a fundamental truth:

there is
no single,
universally
reliable source
for market size
data

Category	Volume [\$m]	Volume [%]	Units sold	price per unit [\$k]	CAGR [%]
Drones (UAVs) for Inspection	500	17	10'000	50	15
Underwater ROVs & Subsea Robots	380	13	380	1'000	12
Ground-Based Wheeled Tracked Robots (UGVs)	580	20	29'000	20	14
Legged Robots (Quadruped & Humanoids)	170	6	340	500	25
Pipe-Crawling & Pipeline Inspection Robots	650	22	1'300	500	13
Climbing Robots (Magnetic / Suction)	260	9	1'300	200	16
Stationary / Teleoperated Manipulators	150	5	1'500	100	10
Robotic Software & Digital Twins	200	8	N/A	N/A	20
Total	2'890				15.8%

The table above presents an estimated breakdown of the inspection and maintenance robotics market for the year 2024. The data is derived from a synthesis of publicly available information, industry reports (though specific reports are not cited directly due to potential paywalls and confidentiality), and expert analysis considering market trends and technological advancements.

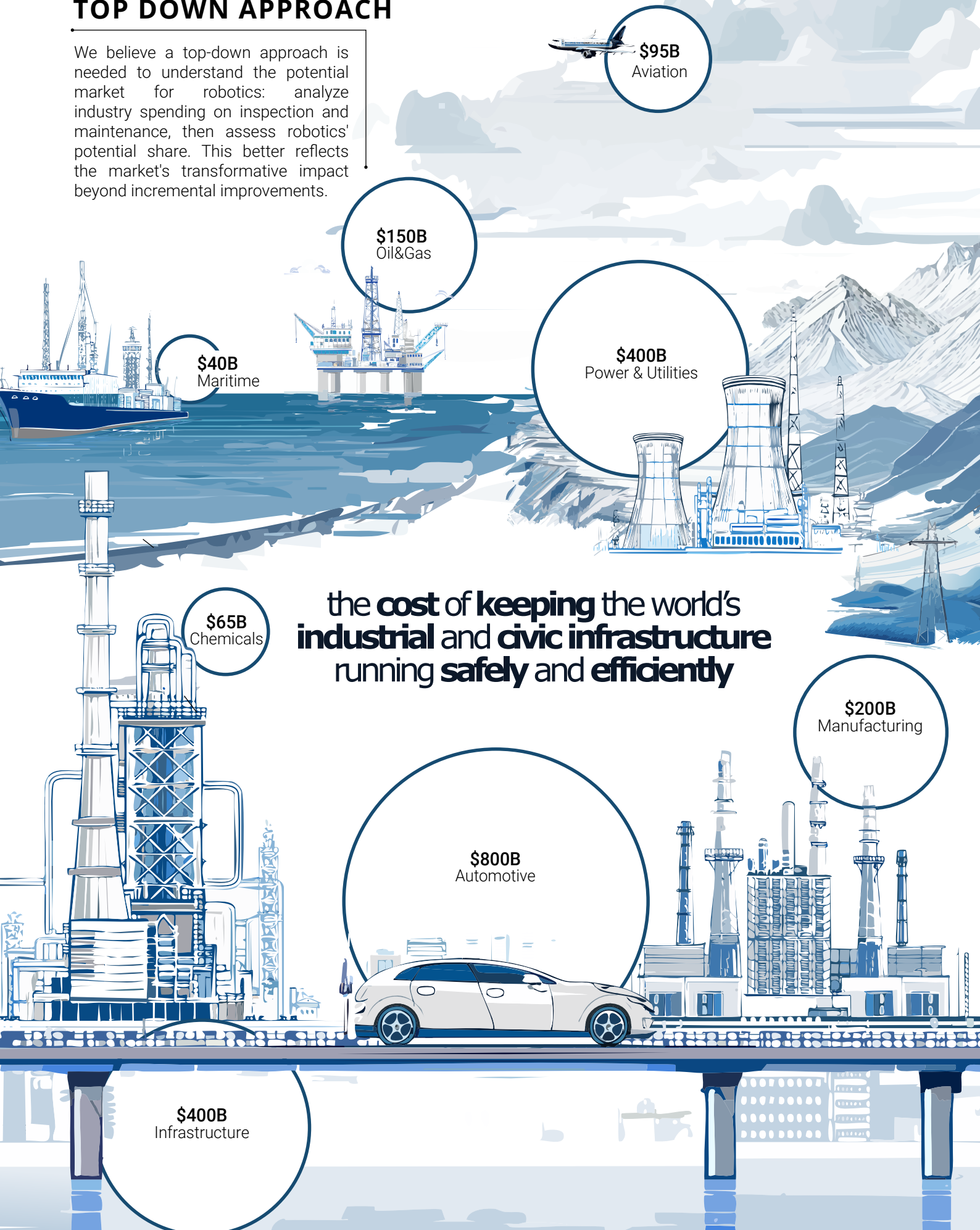
Several factors contribute to this:

- **Varying Definitions:** Different research firms (e.g., Grand View Research, IFR, MarketsandMarkets, Mordor Intelligence) use different methodologies, categorizations, and definitions of "robot." What one firm classifies as an "autonomous robot," another might consider a "robotic device." This is strikingly evident in the I&M sector, where the IFR reported only 400 autonomous I&M robots sold in 2023, while the market for drones used in I&M is orders of magnitude larger.
- **Overlapping Applications:** Robots, especially versatile platforms like Boston Dynamics' Spot or various drone models, are often used across multiple sectors. A Spot unit could be deployed for construction site monitoring one week and warehouse inventory the next. A DJI drone might inspect offshore oil rigs and then survey agricultural fields. This multi-use capability makes it difficult to attribute sales to a single, specific application.
- **Proprietary Data:** Many robotics companies, especially those privately held, do not publicly disclose detailed sales figures broken down by application or region. This creates information gaps that market research firms must fill with estimates and models.
- **Service vs Product:** A significant portion of the revenues made in the I&M robotics market comes from service offerings applying robotic in the field. The robot is provided as an extension or addition to their traditional service offerings.

Double-digit growth is broad-based. The overall market's **15.8%** annual expansion is fueled by surging **demand for legged robots (25% CAGR)** and **digital solutions (20% CAGR)**.

TOP DOWN APPROACH

We believe a top-down approach is needed to understand the potential market for robotics: analyze industry spending on inspection and maintenance, then assess robotics' potential share. This better reflects the market's transformative impact beyond incremental improvements.



the **cost** of **keeping** the world's
industrial and **civic infrastructure**
running **safely** and **efficiently**

CHALLENGES SHAPING THE GLOBAL INSPECTION AND MAINTENANCE MARKET

The global Inspection and Maintenance (I&M) market, often discussed alongside the closely related concept of Inspection, Repair, and Maintenance (IRM), comprises essential services aimed at ensuring the continuous functionality, safety, and regulatory compliance of diverse facilities, infrastructure, and equipment across numerous sectors. While I&M focuses primarily on inspection and upkeep, IRM explicitly includes the corrective

repair aspect, though the terms are frequently used interchangeably to describe the broader ecosystem of asset integrity management. This essential industry is currently navigating a period of significant transformation and pressure. The market is undeniably in a state of profound evolution. While traditional drivers like aging infrastructure, growing energy demand, and basic safety compliance will continue to provide a baseline of activity, future

growth and market leadership will increasingly be defined by the ability to navigate the complex challenges outlined above. Success will hinge on mastering the integration of digital technologies, cultivating a skilled and adaptable workforce, managing escalating operational and cyber risks, and transforming vast amounts of data into actionable, value-generating insights.

1 WORKFORCE

persistent **workforce deficit** characterized by two intertwined problems: a **quantitative shortage** of personnel and a **qualitative mismatch** in skills. experienced technicians and engineers approaching retirement age, leading to a **loss of institutional knowledge** and practical **expertise**.



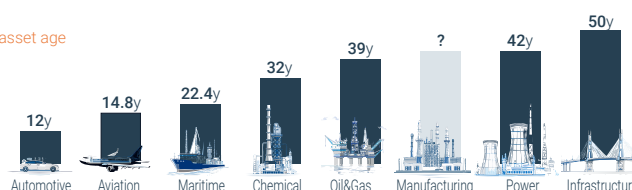
54 years old, works 46 hours per week, has **26 years of experience** in the manufacturing sector and has been with their current employer for 14 years, earns up to **\$67'000 per year**

spends **45%** of his time **retrieving physical work orders or documents** needed to complete a maintenance task.

2 AGING ASSETS

Aging infrastructure significantly elevates maintenance **expenses** and increases frequency of **downtime incidents**. North America and Europe (~70% of critical infrastructure exceeds 25 years), face **substantial maintenance backlogs**. 34% of global industrial downtime is attributed to aging assets.

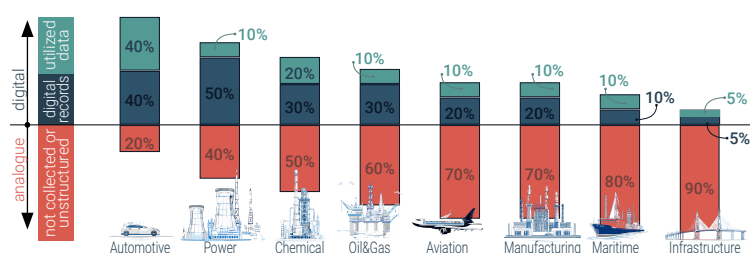
average asset age



3 DIGITAL

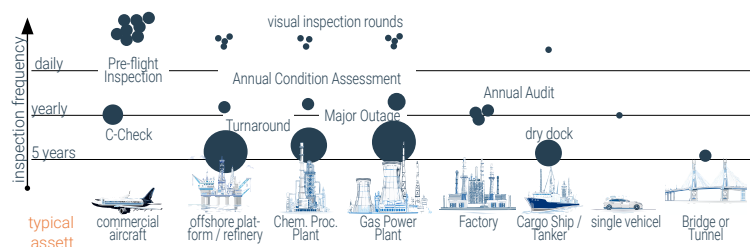
Limited adoption of New Technologies, vast, **underutilized asset data** hinders utilization of predictive maintenance. Integrating technologies like AI and IoT into existing systems is **complex and costly**, facing employee resistance. **Digital skills gap** limits effective adoption and analysis, preventing organizations from fully leveraging the transformative potential of digital I&M.

The graph shows how much asset data is available in a digital vs analogue form and how much digital data is used for maintenance / operational insights (e.g. predictive maintenance programs).



4 REGULATION

Strict, evolving environmental, safety, and **industry regulations** demand continuous monitoring and investment. Growing sustainability focuses necessitate greener practices, posing **cost and expertise** challenges. Non-compliance risks severe penalties and reputational damage. **Global regulatory variations** further complicate I&M for multinational operations.



The data presented in the charts and graphs in this chapter is purely qualitative, intended solely to provide an initial understanding and comparative overview across the individual industries. This summary is compiled from multiple sources, including company reports, market studies, industry benchmarks, and insights from consulting agencies. As such, the figures should be interpreted as indicative rather than definitive. Detailed analyses and quantitative evaluations for each industry sector are provided in subsequent chapters of this report.

Sources: IEA (International Energy Agency), OECD (Organisation for Economic Co-operation and Development), Eurostat, UNIDO (United Nations Industrial Development Organization), Statista, IATA (International Air Transport Association), OICA (International Organization of Motor Vehicle Manufacturers), CEPIC (European Chemical Industry Council), EIA (U.S. Energy Information Administration), World Bank, IMO (International Maritime Organization)/UNCTAD (United Nations Conference on Trade and Development), National Statistical Offices (e.g., U.S. Census Bureau, Destatis), Respective Industry Associations (e.g., ACC for Chemicals in US, VDA for Automotive in Germany), Market Research Firms (e.g., IBISWorld, IHS Markit, Wood Mackenzie, Ciriium).

TECHNOLOGY INSIGHTS

On the ground today, the inspection and maintenance industry is characterized by a blend of traditional and increasingly digital strategies. While time-based and reactive maintenance are still prevalent for many assets. Organizations are actively implementing IoT sensors on critical equipment to collect real-time data on parameters like vibration, temperature, and pressure. This data is being used for basic condition based monitoring and, in more advanced cases, fed into early-stage AI and machine learning platforms to

detect anomalies and predict potential failures days or weeks in advance.

While the full potential of technologies like digital twins and widespread AI-driven prescriptive maintenance is still developing, the current reality is a tangible shift towards data-assisted decision-making and the practical application of remote and automated inspection tools to enhance efficiency, safety, and asset reliability. Challenges remain in data integration and realizing the full ROI of these digital investments.

OIL & GAS

Pigging (Inline Inspection - ILI):

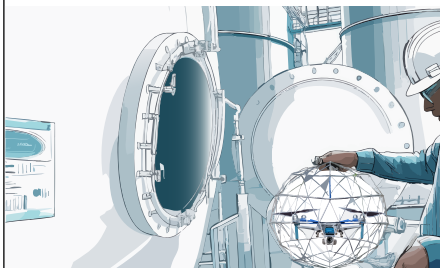
fundamental for **pipeline integrity management**, it utilizes sophisticated "smart pigs" with advanced technologies like Magnetic Flux Leakage (MFL) and Ultrasonics (UT). Crucial for **detecting internal corrosion, cracking, or dents**. Mandated by stringent global regulations and often conducted annually or biennially. While requiring careful planning to minimize line downtime, ILI is **vital for preventing catastrophic failures**, protecting assets and the environment, and ensuring the safe, reliable transport of hydrocarbons across pipeline networks.



CHEMICAL

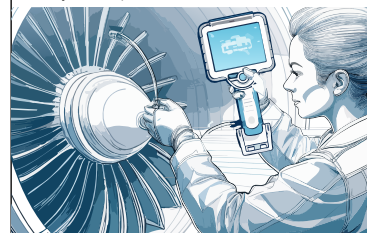
Internal vessel inspection:

Collision-tolerant indoor **drones enter** gas-freeed vessels or tanks **through manways**, use up to 4K RGB, thermal and LiDAR payloads for centimetre-level mapping, and transmit real-time video to **certified API-510 inspectors**, eliminating scaffolding and confined-space entry risk. Newer types can carry UT probes or Eddy-current attachments to gather thickness data, enabling **code-compliant inspections**. Typical turnarounds are **cut from days to hours**, trimming inspection **costs by up to 90%**.



AVIATION

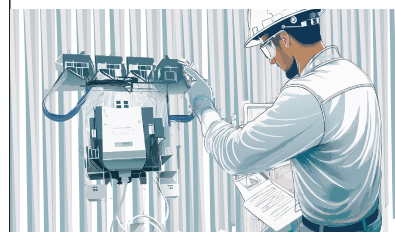
Borescope engine inspections are crucial, enabling detailed internal assessments without dismantling engines. Used on a daily basis globally, modern intelligent borescopes now incorporate **advanced AI** and **high-resolution imaging**, allowing faster, **automated defect recognition**, improved accuracy, **predictive analytics**, and enhanced **digital reporting**. This reduces inspection times, optimizes maintenance schedules, and enhances overall aircraft safety and uptime.



POWER

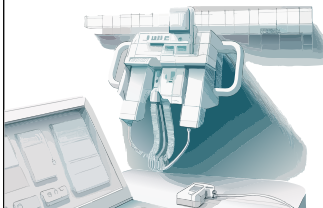
Steam boilers inspection:

UT scanners measure boiler waterwall **tube thickness**. **Advanced systems**, adhering magnetically, can traverse large areas to capture **extensive data points** automatically. This data **generates a color-coded heatmap**, visually representing wall thickness variations. This method accelerates inspection, **highlights areas of thinning (corrosion/erosion)**, and provides a comprehensive **integrity overview** of boiler panels and tubes, crucial for prioritizing maintenance.



MANUFACTURING

Automated Ultrasonic Testing (AUT): enables rapid, accurate, and repeatable **inspection for internal defects** and material thickness, minimizing human error and increasing throughput. Automated **scanners** drive UT (phased-array or TOFD) probes along welds, forgings and additive-manufactured layers, encoding position to **generate real-time B/C-scans**. Crucial for ensuring product integrity and reliability, directly impacting **efficiency** and **cost-effectiveness**.



MARITIME

Ship hull maintenance:

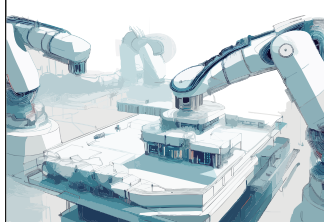
Biofouling—microbes, algae and invertebrates that colonise a hull—can raise propulsive power demand by up to 50%, inflate fuel bills and CO₂, and transport invasive species. **Divers or ROVs** first **video-survey fouling**, then deploy **divers** with waterjet, brush carts or robots. Post-clean footage records coverage, typically restoring 5–15% power loss and meeting IMO biofouling guidelines and port compliance.



AUTOMOTIVE

CT battery testing:

Robotic **grippers pick** fresh **cells**, spin or translate them through micro-CT station, then conveyor-buffer them toward electrolyte filling lines queues. Inline **CT images every EV battery cell** in 1–3s using liquid-metal microfocus sources, high-frame-rate detectors and GPU reconstruction, resolving 20 µm defects. It detects electrode mis-stack, weld voids and foreign metal, triggering auto-divert before electrolyte fill.



INFRASTRUCTURE

Drone LiDAR and photogrammetry:

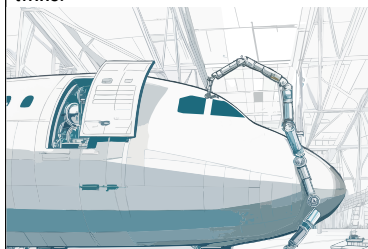
Leveraging UAVs for **rapid acquisition** of **LiDAR** point clouds and/or overlapping images. Software reconstructs detailed, **geo-referenced** 2D orthomosaics and dense 3D models (point clouds/meshes). It's a **cost-effective** method for generating accurate spatial data for surveying, **inspection**, volumetrics, and digital twin creation. It can slash traffic closures by 40 %, and feed AI crack-mapping achieving ±3 mm accuracy.



EMERGING ROBOTICS APPLICATIONS

AVIATION

Combining **AI-guided scanners** (white light or 3D mapping scanners) with articulated **robotic arms or cobots** automates deterministic, **high-resolution surface inspection** of complex geometries inside engines (HPT disk) and external (dents). This integration significantly **boosts productivity** by reducing manual time/variability, ensuring consistent data capture for anomaly detection and **feeding digital twins**.

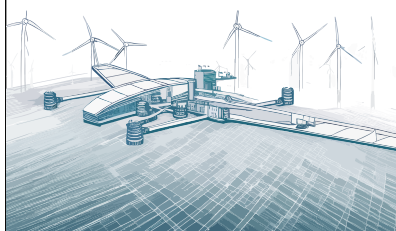


A fundamental shift is occurring across industries, moving away from traditional reactive or purely time-based preventive maintenance schedules towards predictive (PdM) and condition-based maintenance (CBM) strategies. This evolution is largely enabled by the confluence of several key technologies: the proliferation of sensors integrated into assets (Internet of Things - IoT), the capacity to collect and manage

vast amounts of operational data (Big Data), and the application of sophisticated data analytics, machine learning (ML), and Artificial Intelligence (AI) to interpret this data. The core objective is to anticipate potential failures or performance degradation before they occur, allowing for targeted interventions, optimized maintenance scheduling, and reduced unplanned downtime.

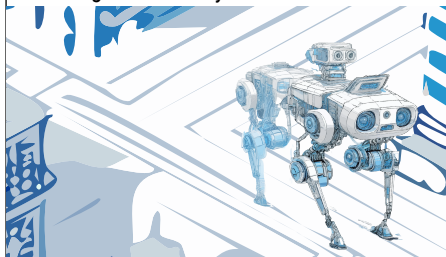
POWER

Autonomous "**drone-in-a-box**" systems are set **disrupt power-grid** and **off-shore inspection**. Permanently stationed units launch **pre-programmed** or **event-triggered flights**, stream HD/LIDAR to AI analytics, performing daily line and substation scans. Utilities trialing this technology report **30-50 % O&M savings**, faster post-storm assessment, and **elimination** of hazardous **helicopter** or tower work, unlocking multi-billion efficiencies as regulation accelerates adoption.



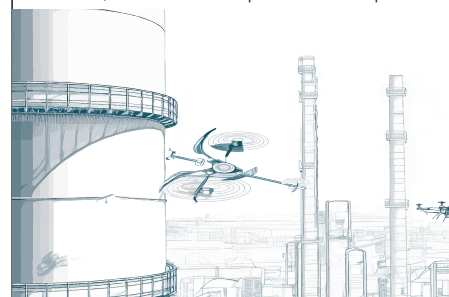
CHEMICAL

Quadruped dog robots can significantly enhance inspection in large **industrial facilities**. Proven deployments at major chemical companies (e.g., BASF, DOW, Evonik) confirm these robots **autonomously navigate** complex terrains, including stairs, gratings, and obstacles. Equipped with **advanced sensors** like visual cameras, thermal imagers, acoustic monitors, and gas detectors. They conduct **frequent, consistent data collection** (operator rounds), exceeding human capabilities. This leads to substantial safety improvements by **reducing human exposure** to hazardous environments and **increasing data accuracy**.



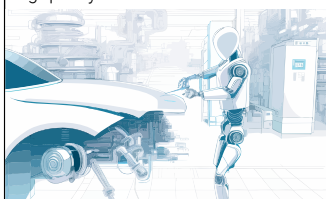
OIL & GAS

Drones carrying **UT or EMAT sensors** dramatically enhance **elevated surface inspections**, eliminating scaffolding or rope access. Proven deployments confirm significant improvements in safety, data precision, and inspection speed. Precise sensor alignment via automated flight ensures reliable, **repeatable measurements, enabling predictive maintenance, reduced downtime, lower inspection costs**, and minimized operational disruption.



AUTOMOTIVE

real-time photorealistic **simulation platforms** let automakers and robotics teams build detailed **digital twins** of entire plants. They rehearse line layouts, program mobile scanners and stream synthetic sensor data to train **defect-spotting AI** before hardware exists. **Humanoid robots** now piloting at plants perform trials at linesides are pre-trained within these twins to fetch parts, carry totes and **run camera-guided inspections**, accelerating launches, trimming re-work and raising quality.



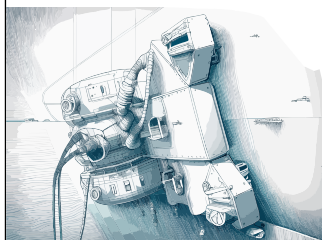
INFRASTRUCTURE

Vacuum- and vortex-based climbing machines latch onto concrete, steel, composites and coated surfaces, carrying **NDT payloads** like ultrasound, GPR and lidar along critical bridge pylons, retaining walls, and other aging infrastructure. Combination of sensor and robot **deliver high-resolution data** while **eliminating scaffolding, cutting downtime, cost and risk**, and keeping inspectors outside confined or elevated hazard zones.



MARITIME

Remotely Operated Vehicles (ROVs) and increasingly, intervention-capable **Autonomous Underwater Vehicles (AUVs)**, are displacing divers in subsea maintenance. Equipped with **advanced manipulator arms, specialized tooling** (e.g., for cleaning, repairs, valve turning), and enhanced sensory feedback, these robots perform complex **intervention tasks in hazardous or deepwater environments**, improving safety and operational endurance.



MANUFACTURING

Cost-effective industrial robots and cobots are increasingly deployed in manufacturing, **powered by AI learning**. This enables adaptive capabilities like **real-time decision-making, enhanced precision, and self-optimization from data**. AI democratizes advanced automation, allowing more accessible integration of flexible, intelligent robotic solutions for tasks ranging from assembly and welding to quality control.



THIS IS
JUST
THE
BEGINNING

Thank you very much for reading the first 8 pages of the report, we hope you enjoyed it and found value in it. We set out to redefine the way people not only get knowledge but also enjoy learning.

The way we get you the insights and basis for educated decision making is based on advanced AI models that scrape information from the public internet and filter the signal out of the noise. We then have industry experts asses and refine the information. Lastly we summarize the core into the smallest chunk of digestable information, best case a graphic or chart. The way you read this report is either by diving deep into the information or by skimming the surface and digest the appealing visuals. Either way, When saying "maximum insight per minute of reading", we really mean it.

Now, as you can imagine even by utilizing AI, it takes a lot of time and effort to put together a report like this. Our aim is that the final version will have more than hundred pages, looking deep into every industrial sector and every applicable technology. To go forward kindly ask for your input.

DIVE WITH US

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