

AR-Assisted Maintenance Platforms

ANMD-MRS19-187 · Extended Reality & Digital Experience

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

AR-assisted maintenance platforms are the software that powers guided maintenance and repair — delivering step-by-step procedures, remote assistance and authoring tools that overlay onto equipment via AR devices or tablets. Device-agnostic, they capture expert knowledge and scale it across the maintenance workforce. This decision-grade study sizes the global market three ways — value, licences and active technicians — across platform capability, application and end-user, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability here is productivity and resource efficiency. AR maintenance extends asset life, cuts errors and waste, and preserves knowledge, while raising privacy and well-being questions that responsible design must address.

Mapped Sustainable Development Goals:

| | | |
|--------------------------------------|---------------------------------------|--|
| SDG 8 Decent Work & Growth | SDG 9 Industry & Innovation | SDG 12 Responsible Consumption |
|--------------------------------------|---------------------------------------|--|

Measurable sustainability outcomes assessed:

- Faster, more accurate maintenance and less downtime
- Captured tribal knowledge and reduced errors
- Extended asset life and resource efficiency
- Worker surveillance and privacy, knowledge-data governance and adoption equity as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

| | | | |
|------------------------------------|-------------------------------|----------------------------------|-------------------------------|
| 53 Chapters | 9 Report Parts | 7 Regions Covered | 40+ Country Markets |
| 2025–32 Forecast Horizon | 4 Forward Scenarios | 25+ Companies Profiled | 5 SDGs Mapped |

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America is the platform leader (United States) on industrial-software majors and strong AR-maintenance vendors; Europe scales on industrial maintenance and aerospace (Germany, the Nordics); Asia Pacific is the fastest-growing engine; other regions assessed on their own merits.

MARKET OVERVIEW

From point tools to enterprise knowledge-and-workflow infrastructure.

AR maintenance platforms are moving from point tools to enterprise knowledge-and-workflow infrastructure. Demand is driven by workforce attrition, uptime pressure and knowledge-capture needs, against content-authoring cost, CMMS/ERP integration and change-management friction. The market is read three ways — value, licences and active technicians — and forecast under four scenarios, each region reported separately.

- **North America leads platforms** — industrial-software majors, strong AR-maintenance vendors and enterprise adoption
- **Europe scales on manufacturing** — Germany and the Nordics, where industrial maintenance and aerospace drive uptake
- **Asia Pacific grows fastest** — China, Japan and South Korea, on manufacturing scale and digitalisation
- **Authoring and knowledge-capture are the differentiators** — scalable procedure creation and expert-knowledge capture separate enterprise platforms from point tools

REGIONAL OUTLOOK

Across seven reporting regions, the report separates deployment leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

| Region | Stage | Lead Country Markets & Drivers |
|---------------|-------------------|--|
| North America | Platform leader | United States, Canada — tech-vendor base, enterprise adoption, funding |
| Europe | Manufacturing-led | Germany, France, United Kingdom, Netherlands — industrial maintenance, aerospace |
| Asia Pacific | Fastest growth | China, Japan, South Korea, India — manufacturing, digitalisation |
| Middle East | Strategy-led | Saudi Arabia, UAE — digital strategy, sovereign investment, smart projects |
| Latin America | Emerging | Brazil, Mexico — enterprise pilots, training adoption |
| Africa | Frontier | South Africa, Kenya — early enterprise and training adoption |

KEY MARKET DRIVERS & RESTRAINTS

| Drivers | Restraints |
|---|---|
| <ul style="list-style-type: none"> • Workforce attrition & knowledge loss • Uptime & maintenance-error pressure • Remote-assistance & expert-scaling • Device-agnostic platform value • Industry 4.0 & connected-maintenance | <ul style="list-style-type: none"> • Content-authoring cost & effort • Integration with CMMS / ERP / PLM • Device & hardware dependency • Adoption & change-management friction • ROI-attribution challenges |

SEGMENTATION SNAPSHOT

| | |
|-------------------------------|--|
| By Platform Capability | Guided procedures · remote assistance · authoring |
| By Application | Manufacturing · energy & utilities · aerospace & defense |
| By End User | Manufacturers · utilities · OEMs · service providers |
| By Business Model | Hardware sale · SaaS · data · managed service |
| By Scale | Pilot · departmental · enterprise / national-scale |

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — AR-Assisted Maintenance Platforms
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
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Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
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- › Chapter 22. Research, Innovation and Funding Landscape

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- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

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- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
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Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans industrial-software and AR-platform majors, remote-assistance specialists, and enterprise-software providers. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, bankable, deployment-ready solutions.

Representative players profiled in the full report:

PTC Inc. · TeamViewer SE · Microsoft Corporation · Scope AR, Inc. · Librestream Technologies Inc. · and further profiled industrial-software and remote-assistance players

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global AR maintenance platform market, and how fast will it grow to 2032?
- ? Which regions, capabilities and applications offer the strongest risk-adjusted opportunity?
- ? How do authoring, device-agnosticism and CMMS integration change platform value?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, worker-privacy and knowledge-data governance?

WHY ANMD — THE DIFFERENCE

Most market studies stop at tonnes and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, carbon-integrity and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- **Triangulated sizing** — every market read three ways (value (US\$), licences and active technicians) so value, capacity and volume views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditions-based investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and venture / PE funds, manufacturers and utilities, OEMs and service providers, industrial-software and AR-platform vendors, system integrators, policymakers, lenders and ESG teams, plus strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.