

A person with a beard, wearing a blue safety vest over a dark t-shirt and a white VR headset, is seated at a desk in a workshop or factory environment. They are holding a white VR controller in their right hand, which is raised. On the desk in front of them is a computer monitor displaying a 3D CAD model of a mechanical part, a keyboard, and a white mug. The background shows industrial equipment and bright lighting.

Extended & Virtual Reality In Portugal

Market Research - January 2026

Now, for tomorrow



Market Positioning & Strategic KPIs



€165M

Est. Market Value

Market range estimated between **€110M - €165M** in 2025.



~200

Active Organizations

17% are scale-ups with annual revenue >€5M.



>55%

Export Oriented

Startups maintain strong international commercial operations.

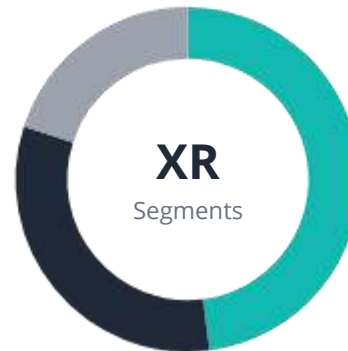
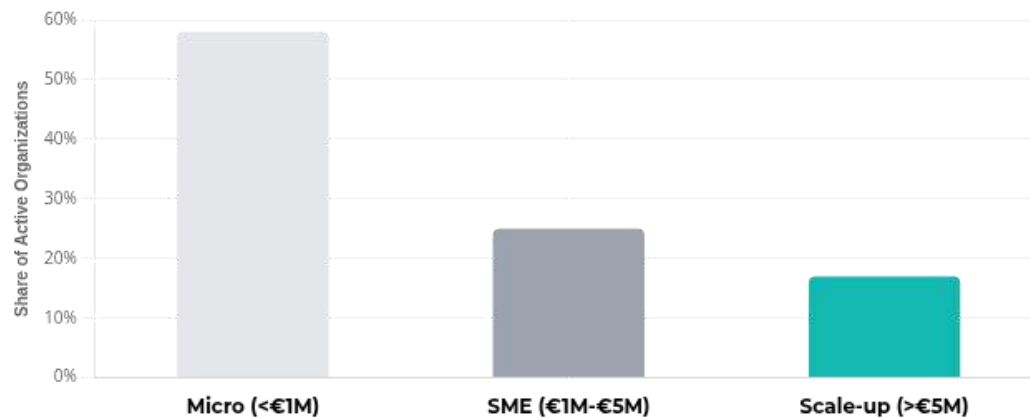


100%

5G Coverage (Munis)

Covering all municipalities and **75%** of parishes nationwide.

Firm Maturity by Revenue Tier



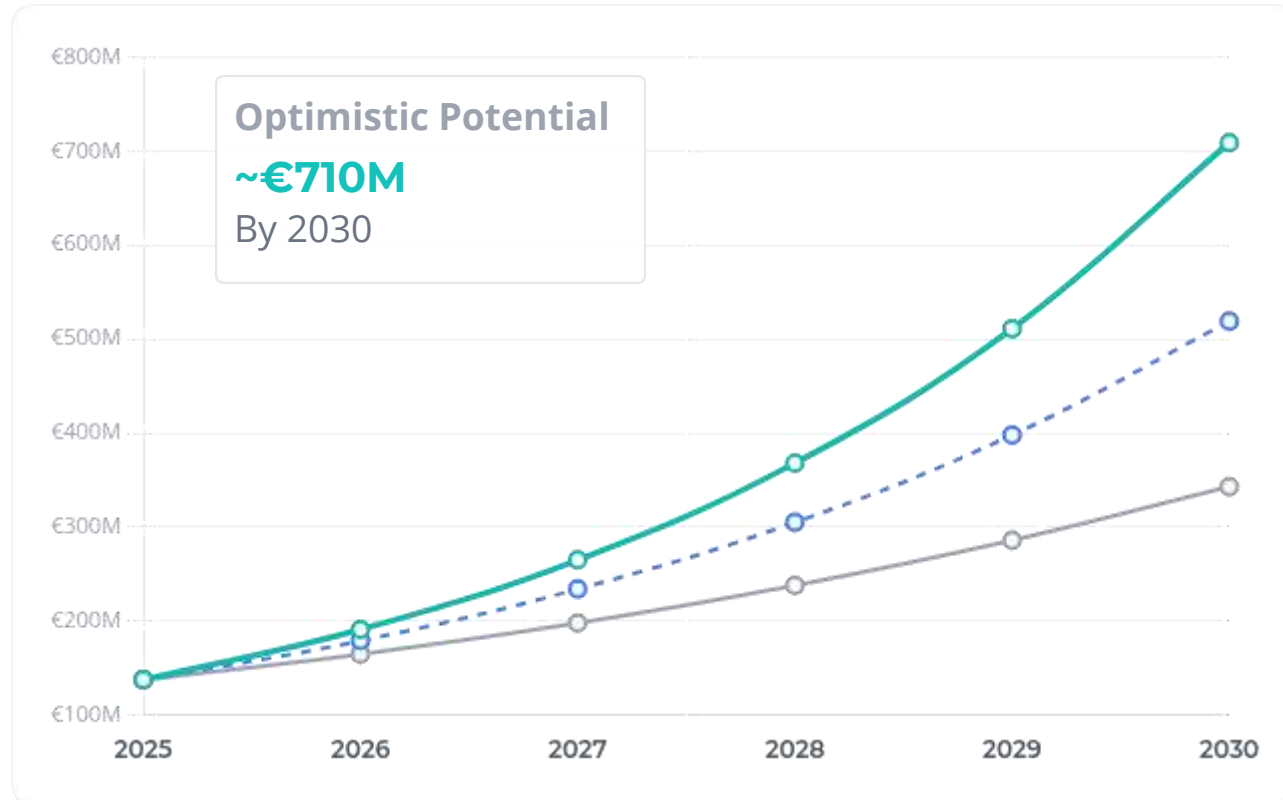
- 48% Software & Platforms**
B2B SaaS, Industrial Metaverse interfaces, specialized apps
- 32% Professional Services**
Custom integration, R&D consulting, content creation
- 20% Hardware & Infra**
Commercial HMD procurement, medical displays, 5G edge

Portugal Growth Projections 2025–2030

CAGR Projections

Market Valuation Forecast (€ Millions)

● Conservative ● Baseline ● Optimistic



*Base year 2025 estimate: ~€137.5M (Midpoint)

Scenario Drivers

Optimistic

41.0%

- ✓ Full PRR funding execution & 5G ubiquity
- ✓ Aggressive Industrial Metaverse adoption

Baseline

30.5%

- Alignment with EU Digital Decade targets
- Steady growth of Lisbon-Porto ecosystem

Conservative

20.0%

- ⚠ Sustained high hardware costs
- ⚠ SME adoption resistance & VC slowdown

Key Opportunities for Growth



Industrial Metaverse

Manufacturing & Logistics

- ✓ **HMI for Digital Twins:** XR serves as the primary Human-Machine Interface for navigating high-density AI data.
- ✓ **Persistent Virtual Worlds:** Moving beyond simulation to create mirrored virtual production lines.
- ✓ **Predictive Ops:** Anticipating climate and supply chain shifts via immersive modeling.



Tourism 4.0

Virtual Heritage

- ✓ **Telepresence:** Increasing impulsive travel desire through risk-free virtual exploration.
- ✓ **AR-Guided Heritage:** Enhancing authenticity without compromising physical landscapes (e.g., Quintas).
- ✓ **Smart Development:** Balancing mass tourism with sustainable "before, during, after" engagement.



Healthcare XR

Clinical Validation

- ✓ **VR Health Champions:** Initiative driving tech from TRL 6 (Prototype) to TRL 9 (Market Ready).
- ✓ **Regulatory Path:** Structured support for CE marking and ISO 13485 compliance.
- ✓ **Digital Therapy:** Validated solutions for cognitive rehabilitation and surgical planning.

Contact us



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