EHS Software - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 143 pages | Mordor Intelligence

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Report description:

The EHS Software Market size is estimated at USD 2.02 billion in 2024, and is expected to reach USD 3.58 billion by 2029, growing at a CAGR of 12.17% during the forecast period (2024-2029).

Environmental health and safety (EHS) software solutions maintain adequate balance among various environmental themes, including regulatory compliance, corporate sustainability toward ecological protection, accident avoidance, environmental audit and inspection, process standardization, and incident response.

Key Highlights
-Environmental health and safety (EHS) software solutions are responsible for maintaining adequate balance among various environmental themes, including regulatory compliance, corporate sustainability toward protecting of environment, accident avoidance, environmental audit and inspection, process standardization, incident response, etc.
-EHS solutions are becoming a core part of every business organization to bring transformation in business continuity, profitable growth, corporate social responsibilities, and operational excellence related to environmental interaction. The integrated environment of government regulations, legal forces, economic conditions, and technologies have convinced organizations from multiple industries to implement EHS solutions as a basic operational need. More importantly, organizations are trying to avoid any future operational expenses due to environmental protection and risks involved with hazardous situations.
-There are various acquisitions by players in the market. In January 2022, Red-on-line, a leading EHS software and content provider, announced to have acquired GutwinskiManagement GmbH. Headquartered in Vienna, Gutwinskiis a leading EHS platform solution in German-speaking countries. The acquisition is further expected to expand the product portfolio and increase its customer base.
-Companies are also rolling out new solutions in order to remain competitive in the market. For instance, in October 2021,

ProcessMAPCorporation, the leading Environmental, Health, and Safety (EHS) software platform provider, announced that the company had established an innovation center in the United Kingdom (UK). The new center will play a key role in facilitating collaboration and accelerating co-innovation with UK-based customers and user community and enabling even stronger customer success engagement at more than 15,000 locations across the UK and Europe.
-Some of the major players, such as Enablon, Intelex, Cority, SAI Global, VelocityEHS, and Quentic, have a greater hold in the market with their enhanced product offerings and strategic initiatives. The market studied is experiencing several partnerships and acquisitions at a global level as part of players' competitiveness.
-For instance, in May 2022, AMCS, a global supplier of integrated software and vehicle technology for the environmental, utility, waste, recycling, and resource industries, signed an agreement for the acquisition of Quentic, a German-headquartered EHS and sustainability software provider.
-There is an increasing need for EHS software by various companies to help increase the ability to monitor the health and safety of workers during COVID-19 by automating reporting and management of cases, communication with workers, increased self-assessments, and voluntary check-ins. Government guidelines have also called for employers to conduct COVID-19 risk assessments to establish needed controls. It is essential to conduct these risk assessments systematically and to have a centralized management method, which the EHS software can offer.
-Even when most staff is not working from home during COVID-19, which may be the case at organizations in essential industries requiring physical labor, such as FMCG and pharmaceutical, EHS software is helping improve efficiency. EHS software automation abilities help save workers, middle and upper- management time that is better employed on performing the primary duties of their jobs, rather than admin. With the work-from-home scenario, EHS software can equip the EHS team with the means to quickly assess risk, collect inspection results, and monitor performance, with which there can be less disruption to operations.

Environmental Health & Safety Software Market Trends

Increasing Data Management and Reporting Requirements may Drive the Market Growth

- Organizations face more pressure to collect, manage, and report EHS data to stakeholders, regulatory bodies, and investors. EHS software offers robust reporting and analytics capabilities, making it easier to collect and analyze data, generate accurate reports, and demonstrate compliance. The need for effective data management and reporting drives the adoption of EHS software.
- Stakeholders, including investors, employees, customers, and communities, are increasingly interested in organizations' environmental and social performance. They expect transparency, accountability, and measurable progress in EHS management. EHS software helps organizations meet these expectations by providing accurate data, robust reporting, and clear visibility into their EHS efforts.
- Effective data management and reporting contribute to an organization's reputation and risk management efforts. By implementing EHS software, organizations can demonstrate their commitment to environmental sustainability, workplace safety, and regulatory compliance. This, in turn, enhances their reputation, reduces operational risks, and improves stakeholder confidence.
- Moreover, according to the KPA Survey 2022, EHS software users report better performance than non-users. Respondents claiming "good" or "excellent" satisfaction percentages are more significant among EHS software users in all categories, from incident reporting and tracking to data collecting and analysis. For instance, compared to 35% of software users, 55% of non-users expressed average satisfaction with their program's data collecting and processing.
- Considering these factors, increasing data management and reporting requirements drive the adoption of EHS software by enabling organizations to efficiently collect, manage, analyze, and report EHS data. The software's capabilities support compliance efforts and contribute to improved decision-making, risk management, and overall operational performance in environmental health and safety.

North America Holds Significant Market Share

- North America, particularly the United States and Canada, has been a significant market for EHS software. The region has stringent environmental and occupational health and safety regulations, driving the adoption of EHS software solutions. Additionally, industries such as manufacturing, energy, and healthcare in North America have been early adopters of EHS software to manage compliance, safety, and risk mitigation.
- Moreover, the region has a strong foothold of EHS software vendors contributing positively to the market's growth. Some vendors based out of North America include Intelex Technologies Inc., VelocityEHS, Sai Global Pty Limited, Dakota Software Corporation, and Gensuite.
- Several players are taking the initiative to strive for zero safety incidents and minimize the impact of their operations on the environment. For instance, ProcessMAPCorporation, a data-intelligence-driven software solutions provider which helps empower customers to transform into a sustainable enterprises, recently announced that Fortune Brands Home & Security, Inc., a Fortune 500 company, will drive the digital transformation of its global EHS and ESG initiatives by leveraging ProcessMAP'ssmart and actionable data-intelligence solutions.
- Vendors in the region are enhancing their EHS software solutions. VelocityEHS, a player in cloud-based environmental, health, safety (EHS), and sustainability software, recently acquired Kinetica Labs, a pioneer in developing sensing and simulation technology for occupational safety and health in Ann Arbor.
- Similarly, VelocityEHS recently acquired OneLook Systems, an Irish software firm. The acquisition will boost its enterprise-wide platform services and capacity to assist users in addressing emerging risk management concerns related to the COVID-19 outbreak and beyond.
- The countries and their respective regional states have developed regulations and requirements to protect their citizens' natural environment and health. Products manufactured, sold, distributed, and imported are subject to an expanding list of complex local, regional, and federal (mandatory and self-regulated) environmental requirements in the United States and Canada. These environmental and safety measures create new compliance challenges for global and local businesses.
- In the North American region, the Environmental Protection Agency (EPA) and the US Occupational Safety and Health Administration (OSHA) strictly implement industrial safety, driving the adoption of EHS Software. Almost all businesses in the United States are subject to OSHA standards, so they are a relevant concern for employers and employees in many industries.

Environmental Health & Safety Software Industry Overview

The Environmental Health and Safety Software Market is fragmented. With many prominent, technologically advanced players in the industry, such as VelocityEHS, Enablon, Cority, and Sphera, the rivalry is intense, especially among the market incumbents. Market penetration is growing, with a strong presence of major players in established markets. With an increasing focus on innovation, the demand for new technologies, such as AI, is growing, which, in turn, is driving investments for further developments.

In January 2023, EcoOnline, a Europe-based provider of environment, health, and safety (EHS) software as a service (SaaS), acquired the software division of Alcumus, a prominent provider of risk management products with headquarters in the United Kingdom. This deal involves the acquisition of the Alcumus software division. The software segment of Alcumus provides organizations with tools to manage and audit EHS risk in various industries, including manufacturing, construction, and retail.

In May 2022, AMCS, a global supplier of integrated software and vehicle technology for the environmental, utility, waste, recycling, and resource industries, signed an agreement for the acquisition of Quentic, a German-headquartered EHS and sustainability software provider.

In May 2022, DNV collaborated strategically with IOGP to establish decarbonization standards, expediting the upstream oil and gas transition. Furthermore, the International Association of Oil and Gas Producers (IOGP) chose DNV to support the decarbonization ambitions of IOGP members, who produce 40% of the world's oil and gas.

In March 2022, Digital Intelligence Systems, LLC, a global technology firm, announced a partnership with ComplianceQuest, a provider of cloud-native, AI-powered, Enterprise Clinical, Quality Health, Safety, and Environmental Management solutions, to offer transformative Environmental Health and Safety (EHS) solutions for customers in the oil and gas industry.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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