

Germany Testing, Inspection And Certification - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany Testing, Inspection And Certification Market size is estimated at USD 10.88 billion in 2024, and is expected to reach USD 14 billion by 2029, growing at a CAGR of 5.20% during the forecast period (2024-2029).

The primary role of testing, inspection, and certification companies is to maintain the health, safety, and quality requirements of their client's products. Testing, inspection, and certification companies are engaged in inspection, verification, testing, and certification services to help increase productivity and also help local manufacturers comply with global standards.

Key Highlights

- Quality Infrastructure plays a vital role in business, innovation, and trade nationally and across borders. Quality infrastructure is the system put in place to ensure products and services are safe and of high quality. It covers everything from standardization and conformity assessment (testing, inspection, and certification) to accreditation, metrology, and market surveillance.
- Standards are voluntary documents describing products, services, technologies, or processes for common and repeated use. They set down compatibility, quality, and safety criteria to ensure certain levels of uniformity and consistency for the benefit of the public. Standardization was estimated to generate an annual national economic benefit in Germany of about EUR 17 billion (USD 18.75 billion), constituting approx. 0.7% of Germany's gross domestic product (GDP).
- Standards are developed in a transparent, consensus-based process. Voluntary and consensus-based standards are beneficial to the public sector, businesses, and society. They support the government with regulation and self-regulation by the industry. The German Institute for Standardization (Deutsches Institut für Normung - DIN) and the German Commission for Electrical, Electronic & Information Technologies of DIN and VDE (Deutsche Kommission Elektrotechnik Elektronik Informationstechnik in DIN und VDE, DKE) are the recognized national standardization bodies in Germany. German standardization has a consistent international agenda. Standards provide a common technical language for trade partners throughout the world and ease value chains that

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cross borders.

-Moreover, Conformity assessment procedures demonstrate compliance with specified requirements. These requirements may be defined through legislation, technical regulation, standards, or other means. Conformity assessment increases reliability and objectivity when it comes to the quality and safety of products and services. For Germany's internationalized and modern economy, conformity assessment plays an essential role not only in creating trust between market participants but also in achieving public goals such as consumer safety and environmental protection.

-Also, the German National Metrology Institute (Physikalisch-Technische Bundesanstalt - PTB) conducts conformity assessment activities in the field of statutory metrology (e.g. on energy measurement equipment). The Federal Institute for Materials Research and Testing (Bundesanstalt für Materialforschung und -prüfung - BAM) undertakes conformity assessment activities in areas relevant to technical safety, including dangerous-goods containers (e. g. CASTOR containers) and explosive materials.

-Globalization of trade leads to a complex supply chain that can impact product quality. Therefore, TIC services are required at every stage of the supply chain to maintain the same. Due to rapid globalization, privatization of state-owned laboratories, and increasing standards of end-user efficiency, complex supply chains have posed major challenges to the TIC market.

-With the increasing penetration of IoT and the growing popularity of autonomous driving, the market is further observing new wireless online testing processes. For instance, in May 2022, DEKRA, together with five business partners, launched a research project called LAURIN, whose goal is to take the process of steering test vehicles all around, moving objects up to a whole new level.

-The automated driving functions are tested at DEKRA's Lausitzring site, not just through simulation but also by performing real-life tests. The LAURIN research project is scheduled to last for three years and is sponsored by Germany's Federal Ministry of Digital Affairs and Transport. In addition to testing components in accordance with the wireless-network-based 5G standard, a wide range of scenarios can be tested for networked communication between vehicles and with their surroundings using the 5G mobile communications standard.

Germany Testing, Inspection And Certification Market Trends

Certification to be the Fastest Growing Type of Service

- Infrastructure, construction, automotive, and other industries are anticipated to open the door for market expansion in the certification segment, making it the category with the fastest projected growth.

- Many organizations choose to engage independent third parties to review their policies, controls, procedures, and systems. Third-party certification is a written assurance provided by an independent body that an organization's policies, controls, procedures, or systems, as applicable, meet a given defined requirement or standard. The ISO/IEC 27001 family of standards covering information security management systems is a well-known example of such standards.

- Manufacturers of various goods and accessories are legally required to obtain approval and certification before their items are sold on the market. In order to get access to important markets, producers are required to test their goods to ensure that they adhere to the regionally established product standards.

- The region's market growth is boosted by the introduction of new certification programs. According to the industry association DEKRA, it is now permitted to evaluate and accredit vapour recovery equipment. The newly created DEKRA Test Centre for Vapour Recovery Systems was formally inaugurated in June 2023. In compliance with DIN EN 16321-1:2013-12, DEKRA, a market leader in petrol station testing, now conducts type testing for manufacturers of fuel station systems.

- Additionally, in July 2022, the German firm Method Park, which specializes in software solutions, process engineering, training, and consultancy services for the automotive, aerospace, and medical industries, was acquired by UL LLC, a global provider of safety certification services. The acquisition increases UL LLC's capacity to help clients advance innovative safety, corporate change, and regulatory and standards compliance.

- The demand for connected and autonomous vehicles is on the rise, there is a need for compliance with regulations, and new

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technologies and systems are being developed. These factors, along with the increase in automotive manufacturing, are expected to drive strong growth for Certification Services in Germany.

Automotive Sector is Expected to Witness Significant Growth

- The recovery in automotive manufacturing and trends like electric vehicles and autonomous cars are some of the significant factors driving the demand for TIC in the German automotive industry. Furthermore, growth in safety technologies such as advanced driver-assistance systems (ADAS) and vehicles using sensors, cameras, and laser scanners, among others, will further create massive growth opportunities for the studied market vendors in the coming years.
- Germany is a major automotive hub globally due to the presence of major automotive and OEM manufacturing companies such as Robert Bosch GmbH, Volkswagen AG, and Daimler AG. Consistent development of vehicle-to-vehicle, vehicle-to-infrastructure, and in-vehicle entertainment technologies is expected to drive the studied market during the forecast period.
- Currently, testing related to EVs is going beyond homologation testing for the vehicles and their components. It covers the charging interfaces and the associated systems that help the vehicles, charging stations, and back-office systems communicate with one another.
- Moreover, the increased integration of wireless and network technologies is enabling connectivity services in today's generation of vehicles. Currently, many new cars in the region come equipped with onboard diagnostics, cellular services such as eCall, and assistance agents. In the future, new connected car services and automation are expected to increase comfort and safety even further. However, this will also place additional demands on testing and certification.

Germany Testing, Inspection And Certification Industry Overview

The German testing, inspection, and certification market is fragmented and consists of significant players. However, in terms of market share, notable players in the country, such as TUV SUD Limited, dominate the market. Multiple startups and incumbent TIC companies with a digital focus pose fierce competition with traditional TIC companies. Existing TIC companies are making mergers and collaboration activities a part of their core strategy over the forecast period.

- August 2023: CERTANIA, a Germany-based provider of Testing, Inspection and Certification (TIC) services focusing on global health and sustainability challenges, joyfully announced that it has received a generous investment boost from Summit Partners. Additionally, CERTANIA gratefully acknowledges that existing investor GREENPEAK Partners will continue to hold a substantial stake in the company. CERTANIA believes that this investment will greatly contribute to fortifying its strategy for acquiring other companies, thereby solidifying its position as a leading TIC provider in Europe and worldwide.
- June 2023: TUV SUD declared that it assists data center operators in implementing the new regulations. There has been a significant revision to the German Blue Angel quality mark. Data centers and IT operators can demonstrate compliance with the voluntary environmental badge by proving that they meet the most recent sustainability standards. On December 31, 2023, existing certifications will become invalid. The company thus declared that it would offer consulting or auditing services to aid data center and IT operators attempting to implement the new regulations.

Additional Benefits:

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

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Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview (Covers the Impact due to COVID-19)

4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers

4.2.2 Bargaining Power of Buyers

4.2.3 Threat of New Entrants

4.2.4 Threat of Substitutes

4.2.5 Degree of Competition

4.3 PESTLE Analysis

4.4 Major TIC Standards and Regulations

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Government Regulations and Mandates to Ensure Product Safety and Environmental Protection

5.2 Market Challenges

5.2.1 Increase in Lead Times for Assessment Programs due to the Growing Complexity of the Supply Chain

6 TECHNOLOGY SNAPSHOT

7 MARKET SEGMENTATION

7.1 By Sourcing Type

7.1.1 Outsourced

7.1.1.1 Type of Service

7.1.1.1.1 Testing and Inspection

7.1.1.1.2 Certification

7.1.2 In-house/Government

7.2 By End-user Vertical

7.2.1 Consumer Goods and Retail

7.2.2 Automotive

7.2.3 Food and Agriculture

7.2.4 Manufacturing and Industrial Goods

7.2.5 Minerals and Metals

7.2.6 Oil & Gas and Chemicals

7.2.7 Construction

7.2.8 Transport, Aerospace and Rail

7.2.9 Other End-user Verticals

8 MARKET STRATEGIES ADOPTED BY VARIOUS COMPANIES

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9 COMPETITIVE LANDSCAPE

9.1 Company Profiles

9.1.1 Societe Generale de Surveillance SA (SGS SA)

9.1.2 TUV SUD Limited

9.1.3 Bureau Veritas SA

9.1.4 Intertek Group PLC

9.1.5 DEKRA SE

9.1.6 ATG Technology Group

9.1.7 A/S Baltic Control Group Ltd

9.1.8 CIS Commodity Inspection Services BV

9.1.9 Applus Services SA

9.1.10 VIC Inspection Services Holding Ltd

9.1.11 Eurofins Scientific SE

9.1.12 RTM BREDAS.r.l.

9.1.13 Kiwa NV

9.1.14 AQM S.r.l.

9.1.15 ALS Limited

9.1.16 Element Materials Technology Group Limited

9.1.17 Mistras GMA - Holding GmbH

9.1.18 UL LLC

9.1.19 TUV Nord

10 INVESTMENT ANALYSIS

11 FUTURE OF THE MARKET

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