

Testing, Inspection, And Certification - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Testing, Inspection, And Certification Market size is estimated at USD 263.40 billion in 2025, and is expected to reach USD 331.08 billion by 2030, at a CAGR of 4.68% during the forecast period (2025-2030).

Testing involves the determination of one or more characteristics of an object or system according to a specific procedure. It is the process of evaluating the performance, functionality, reliability, and other relevant aspects of a product or system. Testing can be conducted in laboratories or on-site, and it helps identify any defects, weaknesses, or non-compliance with standards or requirements.

- Inspection entails scrutinizing a product's design, process, or installation to verify its adherence to defined standards. This process involves a detailed assessment of a product's physical characteristics, operational capabilities, and regulatory compliance. Inspections are pivotal and can occur at different junctures, such as during production, installation, or routine upkeep, guaranteeing alignment with requisite standards and guidelines.

- The global energy and power sector is currently experiencing a substantial transformation. This shift is primarily motivated by the imperatives of combating climate change, enhancing energy efficiency, and securing a sustainable future. In recent years, there has been a surge in investments in energy-efficient processes. This change can be attributed to various factors, including the need to reduce greenhouse gas emissions, decrease energy consumption, and lower operational costs. Energy-efficient processes encompass a wide range of technologies, such as advanced insulation, energy-efficient lighting systems, and high-efficiency HVAC systems.

- In recent years, the issue of environmental pollution has gained significant attention worldwide. One of the major contributors to

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this problem is the automotive sector, with vehicle emissions playing a crucial role.

- The primary reason for the growing emphasis on automotive emission testing and certification is the detrimental impact of vehicle emissions on the environment. Harmful pollutants like carbon monoxide, nitrogen oxides, and particulate matter contribute to air pollution and climate change. These pollutants not only degrade air quality but also contribute to the depletion of the ozone layer. By implementing stringent emission standards and testing procedures, governments aim to mitigate these environmental hazards.
- In recent years, the TIC market has witnessed a proliferation of regulations, standards, and certifications across various industries. This has resulted in a more complex and interconnected supply chain involving multiple stakeholders, suppliers, manufacturers, and distributors. Globalization has also amplified this complexity, with products being sourced from different regions, each subject to its regulations.
- In the current scenario, the macroeconomic situation remains volatile, and players continue to see macro trends such as high interest rates, inflation, fear of recession, and geopolitical tensions increasing in some parts of the world, which can impact industrial activities in the future and the demand for products in the TIC market. In April 2024, UN Trade and Development (UNCTAD) forecast global economic growth to slow down to 2.6%, marginally above the 2.5% threshold commonly associated with a recession, which would lower the market growth.

Testing, Inspection, and Certification Market Trends

Energy and Chemicals to be the Largest End-user Vertical

- Given the potential hazards, safety stands as a top priority in the energy and chemicals sector. TIC services help verify compliance with safety regulations and industry standards. For instance, in the chemical industry, TIC ensures the integrity of pipelines, storage tanks, and drilling equipment, minimizing the risk of accidents. TIC helps evaluate the safety of manufacturing processes and handling hazardous substances.
- TIC services are essential in maintaining product quality across the energy and chemicals segment. Through rigorous testing, inspection, and certification, TIC ensures that products meet the required standards. In the renewable energy sector, TIC verifies the performance and durability of solar panels, wind turbines, and energy storage systems. For chemical products, TIC helps assess purity, composition, and adherence to quality specifications.
- In the energy and chemicals sector, sustainability and environmental responsibility are now pivotal. TIC services aid in assessing and minimizing the environmental impact of operations. Environmental testing helps identify pollutants and monitor air, water, and soil quality. TIC also supports compliance with environmental regulations, such as emissions control and waste management.
- TIC services are crucial for maintaining product integrity and traceability across supply chains. This includes verifying the origin and quality of raw materials, conducting inspections at various stages of production, and certifying the final products for export or distribution.
- Safety inspections are crucial in the energy and power sector to prevent accidents, protect workers, and maintain a safe working environment. These inspections involve assessing equipment, machinery, and infrastructure for potential hazards. Fire safety inspections, electrical safety audits, and gas leak detection are some of the safety inspections carried out to identify risks and implement corrective measures.
- In November 2023, ScottishPower Renewables awarded DNV a three-year contract. DNV will provide integrated inspection services for the East Anglia Three project. The scope includes site inspections, vendor evaluations, and quality management services, spanning both project and vendor sites worldwide until 2026. As per the Managing Director for the East Anglia Hub, East Anglia Three is set to be the world's second-largest wind farm when it comes into operation in 2026. It is anticipated to play a key role in enhancing the United Kingdom's energy security and providing clean, renewable energy that would facilitate it to reach net

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zero.

- As per the Global Energy Monitor report, in June 2024, China led the world with 129 operational wind farms, predominantly offshore. Following China, the countries with significant offshore wind farm presence include the United Kingdom, Germany, and Vietnam. The offshore setting benefits from stronger wind speeds, translating to increased electricity generation compared to onshore installations. SSRs are crucial in wind turbine control systems, facilitating blade pitch and yaw orientation adjustments. Their precise and reliable operation is vital for maximizing turbine performance and capturing wind energy efficiently.

Asia Pacific to Register Major Growth

- China is significantly investing in the market's growth. The country has become an attractive spot through developing indigenous industries and subsequent acceleration in exports, the introduction of stringent standards, and rapid urbanization, which creates various opportunities for TIC in the country.
- China's "Made in China 2025" initiative has identified 5G as an emerging industry. It offers opportunities for Chinese enterprises to become more competitive and innovative in the international market and prevent low-quality and counterfeit goods from entering the market, which can be achieved through domain-specific certifications.
- The Chinese government has implemented beneficial policies to allow foreign entities to establish a presence in the country to promote gradual liberalization. Local companies dominate the majority of the TIC market in various Chinese provinces. The government has promoted foreign investments in the TIC sector by removing obstacles for international TIC providers to enter and function in the mainland market.
- For instance, in April 2024, MPR China Certification GmbH and its subsidiaries MPR International GmbH and China Certification Corporation revealed their strategic alliance with CERTANIA. This rapidly expanding group specializes in testing, inspection, and certification (TIC) services. This partnership signifies a significant achievement for MPR, enabling the company to expedite its growth initiatives.
- In pursuit of carbon neutrality by 2050, the Japanese government has unveiled a series of energy policies. These policies target significant reductions in greenhouse gas emissions across key sectors, including electric power, industry, and transportation. Specifically, the government has set ambitious 2030 targets for the electric power sector. These targets involve ramping up investments in renewable energy, bolstering nuclear generation, and scaling back reliance on fossil fuels for electricity production.
- Various developments in the power and energy sector are expected to create opportunities for the market studied. For instance, in April 2024, GE Vernova's Gas Power business announced it had secured an order from Korea Western Power Co. Ltd (KOWEPO), a subsidiary of Korea Electric Power Corporation (KEPCO), to provide a GE Vernova7HA.02 gas turbine and a H65 generator for KOWEPO's power station in Gongju-si, Chungcheongnam-do Republic of Korea.
- The growing urbanization, changing demographics, and steady growth in retail have propelled the growth of the food processing industry in India. This increased demand has led to a surge in production from food and beverage companies. These companies are capitalizing on the growing middle-class population by introducing new products and expanding their existing product lines, thus supporting the market growth.

Testing, Inspection, and Certification Industry Overview

The global testing, inspection, and certification market is fragmented with the presence of various companies like Intertek Group PLC, SGS SA, Bureau Veritas, UL Solutions Inc., DNV AS, Eurofins Scientific SE, Dekra SE, ALS Limited, etc. The intensity of competitive rivalry in the testing, inspection, and certification market studied is high and expected to remain the same over the forecast period.

Both existing and new market incumbents are adopting a digital innovation strategy. Companies are engaging in significant

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merger and acquisition activities that are expected to intensify market competition. Existing TIC companies are expected to continue incorporating expansion and product innovation activities into their core strategies over the forecast period, considering the anticipated market growth, increasing globalization, and rising digitalization trends.

Overall, the market studied is expected to be highly competitive. With high consolidation expected over the next few years, the competitive rivalry will increase further.

Additional Benefits:

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

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