



Testing, Inspection & Certification (TIC) Industry Analysis

MARKET RESEARCH 2026

Now, for tomorrow



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Scope & Definition

General Overview

The **Testing, Inspection, and Certification (TIC) industry** provides the independent verification necessary to manage risk and ensure regulatory compliance across global supply chains. It serves as the critical, though often invisible, infrastructure that underpins the reliability of global trade and the safety of the modern economy.

Testing (65-72% of revenue)

Analytical performance assessment of materials or systems against standardized procedures. Requires controlled laboratory environments with high fixed costs and specialized instrumentation.

Inspection (-25% of revenue)

Field-based physical examination of assets or processes in situ. Asset-light, people-intensive model with superior agility and ROIC.

Certification (-10% of revenue)

Formal third-party attestation that a product or system complies with specific criteria (e.g., ISO standards). Fastest-growing segment at 8.4% CAGR.

Study Parameters



Data Extraction

All data extracted from authoritative industry sources in 2024-2025



Study Objective

Provide comprehensive market overview for strategic decision-making



Strategic Focus

M&A opportunities, investment thesis, and market positioning

200+

Data Sources

50+

Countries Analyzed

Scope & Definition

Key Players / Top Companies



SGS SA
Switzerland

Founded: 1878
Employees: 100,000+
Revenue: CHF 7.1B

Global Leader with focus on emerging markets and ESG verification



Bureau Veritas
France

Founded: 1828
Employees: 84,000+
Revenue: €6.4B

Performance specialist with pivot to cybersecurity and luxury goods



Intertek
United Kingdom

Founded: 1888
Focus: Consumer Products
Revenue: £3.0B

Margin pioneer enhancing customer interface through digital portals



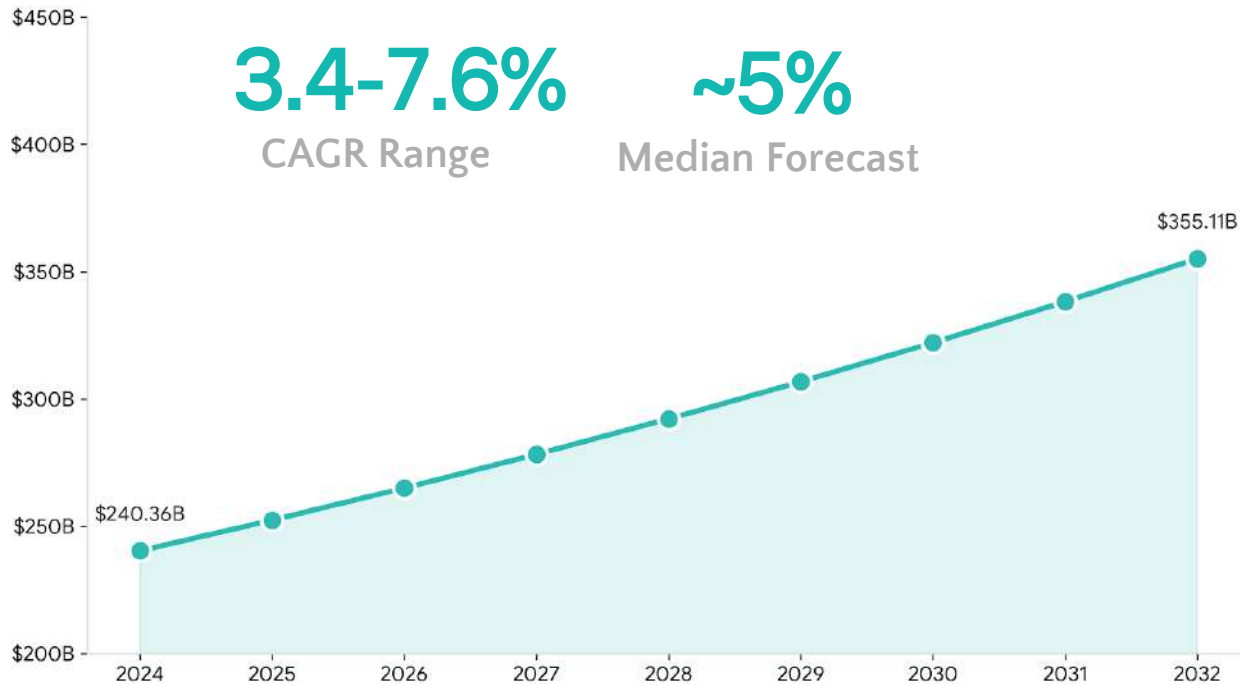
Eurofins Scientific
Luxembourg

Founded: 1987
Strategy: Buy & Build
Acquisitions: 378 since 2015

Life Sciences & Food Safety dominance through aggressive M&A

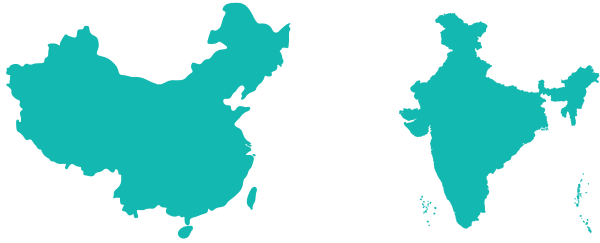
Market Size & Growth

Market Size



Research Source	Valuation Year	Market Size (USD Billions)
Grand View Research	2025	\$417.76 Total Ecosystem
Zion Market Research	2024	\$230.58 Outsourced Focus
Mordor Intelligence	2025	\$263.40 Commercial Focus
SkyQuest Technology	2024	\$246.36 Outsourced Focus
Global Market Insights	2024	\$256.90 Commercial Focus
Business Research Company	2024	\$227.58 Outsourced Focus

Regional Market Analysis



Asia-Pacific

45-47%

Market Share

5,3-5,6%

CAGR

- **5.3-5.6% CAGR** – highest growth rate globally
- Massive manufacturing infrastructure investments in China, India, Southeast Asia
- China amended **2,000+ new national standards** in 2024
- India: **100 new food testing labs** planned

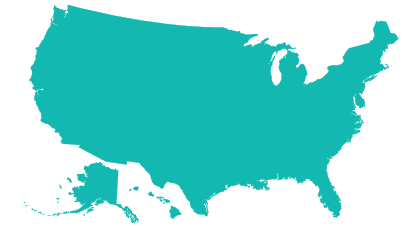


Europe

2.6-4.0%

CAGR

- Anchored by Germany's industrial culture and strict EU mandates
- **CSRD:** Expands audited sustainability reports from 12,000 to **50,000 companies**
- **CBAM:** Carbon Border Adjustment Mechanism creates new revenue streams
- Focus on high-value digital validation and ESG audits



North America

2.1-3.6%

CAGR

- Leadership in "Digital TIC" – cybersecurity and software validation
- U.S. Cyber Trust Mark for connected medical devices
- Advanced manufacturing hubs driving demand
- Focus on AI model validation and post-quantum cryptography

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