

Europe Non-Destructive Testing (NDT) Services Market - A Regional Analysis: Focus on Application, Type, and Country - Analysis and Forecast, 2023-2033

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Abstracts

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Introduction of Europe Non-Destructive Testing (NDT) Services

In Europe, non-destructive testing (NDT) services are a critical component, offering a broad spectrum of methodologies, including ultrasonic, radiographic, microwave testing, liquid penetrant, magnetic particle, neutron radiographic testing, and visual inspection. These techniques are meticulously adapted to meet the distinct needs of key industries such as aerospace, automotive, construction, and energy. The primary function of these services is the precise detection of defects and anomalies in materials and components, ensuring this is achieved without any compromise to their operational integrity. Moreover, European NDT services are at the forefront of incorporating technological innovations such as 3D imaging, artificial intelligence, and machine learning algorithms. This progressive integration transforms NDT from mere fault detection to a tool for predictive maintenance. Such a strategic approach enables industries to foresee and pre-emptively address potential system failures, thereby enhancing operational efficiency, extending asset life, and bolstering safety protocols.

Additionally, the alignment of NDT services with Europe's commitment to sustainability and efficient resource management is particularly noteworthy. These services contribute significantly to prolonging material lifespans and minimizing waste. The adoption of digital technologies, including digital radiography and 3D scanning, is emblematic of Europe's dedication to Industry 4.0 principles. These technological advancements not only boost the precision and efficiency of inspections but also facilitate superior data analysis and strategic decision-making processes. This, in turn, reinforces the

indispensable role of NDT in bolstering and maintaining the robustness of the region's industrial infrastructure.

Market Introduction

The Europe non-destructive testing (NDT) services market is gaining substantial traction, which is driven by the increasing need to ensure the integrity and reliability of critical infrastructure and complex machinery in various industries. This market's growth has been catalyzed by the heightened emphasis on safety standards, particularly in sectors such as aerospace, automotive, manufacturing, and construction. With Europe's stringent regulatory landscape and growing technological advancements, NDT services have become more essential for maintaining operational efficiency and preventing catastrophic failures. These services encompass a range of inspection methods, from ultrasonic to radiographic testing, providing invaluable insights into the condition of materials and structures without causing any damage. The rise in infrastructure development, aging assets requiring regular inspection, and the integration of Industry 4.0 technologies are further propelling the demand for advanced NDT services in the region. As industries continue to evolve and face new challenges, the role of NDT in ensuring safety, compliance, and efficiency becomes increasingly critical, positioning the Europe NDT services market at the forefront of technological innovation and industrial safety.

Industrial Impact

Non-destructive testing (NDT) services in Europe have a significant industrial impact, shaping various sectors through their contributions to safety, efficiency, and sustainability. These services are crucial for ensuring safety and compliance with Europe's stringent regulations, especially in high-risk industries such as nuclear power, aerospace, and chemical manufacturing. NDT enables the early detection of material flaws and potential failures, thereby preventing accidents and enhancing operational safety.

Additionally, NDT services play a vital role in enhancing operational efficiency and reducing costs. Regular and precise inspections allow for timely maintenance, avoiding unplanned downtime and extending the lifespan of equipment, which is particularly beneficial in cost-sensitive industries. The integration of advanced NDT techniques, such as phased array ultrasonics and advanced radiography, also positions Europe at the forefront of technological innovation, fostering research and development in material science and industrial processes.

Sustainability is another key area where NDT services make a significant impact. With an increasing focus on environmental protection, NDT helps monitor and ensure the integrity of critical installations, contributing to the sustainability goals of industries. In the manufacturing sector, particularly in automotive and aerospace, NDT is instrumental in quality assurance, guaranteeing the reliability and high quality of European industrial products. Europe's aging infrastructure also benefits greatly from NDT services. Regular inspections help assess and preserve historical buildings, bridges, and utility systems, ensuring their safety and longevity. Moreover, the integration of NDT with digital technologies such as AI and IoT aligns with the objectives of Industry 4.0, leading to more connected and intelligent industrial environments where predictive maintenance and data-driven decision-making are increasingly prevalent.

Market Segmentation:

Segmentation 1: by Type

Ultrasonic Testing

Radiographic Testing

Eddy Current Testing

Magnetic Particle Testing

Penetrant Testing

Visual Testing

Leak Detection Testing

Radiographic Testing Segment to Dominate the Europe Non-Destructive Testing (NDT) Services Market (by Type)

The radiographic testing segment is poised to dominate the Europe non-destructive testing (NDT) services market by type. This dominance can be attributed to the widespread adoption of radiography testing across various industries in Europe, including aerospace, automotive, and manufacturing. Radiography testing, known for its

efficiency in detecting internal flaws and providing detailed insights without damaging the test object, is increasingly favored for its accuracy and reliability. The method's ability to inspect complex geometries and thick materials makes it essential in quality control and safety assurance processes. Furthermore, technological advancements in digital radiography and increased investments in infrastructure development are expected to drive the growth of the radiography testing segment in the Europe NDT services market further.

Segmentation 2: by Application

Automotive and Aviation

Construction and Infrastructure

Energy and Power Generation

Industry Assets

Oil, Gas, and Chemicals

Process Industry

Utilities

Recent Developments in the Europe Non-Destructive Testing (NDT) Services Market

In November 2023, FORCE Technology and Welltec unveiled their strategic collaboration to revolutionize advanced testing services for carbon capture, utilization, and storage (CCUS) and power-to-X (PtX) markets. By synergizing the strengths of FORCE Technology and Welltec, the collaboration aimed to deliver cutting-edge expertise and utilize state-of-the-art testing facilities. This joint effort signifies a substantial commitment to advancing green energy transformation and climate technologies, marking a significant stride toward a sustainable future.

In August 2023, T?V Rheinland announced extending its mobile solar module testing services across Europe. The benefit of the mobile solar lab is that providers and users of PV modules would no longer need to transport their

modules to a laboratory; instead, the laboratory would come to the module. A commercial van would house the mobile PV laboratory. It would feature all of the technical equipment required for batch measurements before installing PV modules. It can test up to 150 modules daily, according to T?V Rheinland specialists.

In October 2023, Testia signed a contract with Composites Technology Research Malaysia (CTRM). Through this contract, CTRM subsidiary CTRM Testing Laboratory Sdn. Bhd. has been recognized as the first calibration center for Testia's inspection products in the Asia-Pacific area and the first of such facilities outside Testia's home base in Toulouse, France. Other services will include non-destructive testing (NDT) training, the NDT cadet academy program for creating NDT-certified professionals via theoretical and on-the-job training, and Testia product distribution in the Asia-Pacific region

Demand – Drivers, Challenges, and Opportunities

Market Demand Drivers: Evolving Software Solutions to Simplify the Inspection Process of NDT

Software solutions in non-destructive testing (NDT) continually evolve to streamline and simplify the inspection process by offering seamless integration with various inspection methods, intuitive user interfaces, and automated data collection and analysis. These advancements facilitate a more efficient, accurate, and user-friendly approach to NDT. Enhanced data management and reporting and real-time monitoring and trend analysis provide deeper insights into inspection processes, aiding in quality control and compliance. The incorporation of remote access through cloud technologies and the adaptability of software to specific industry needs through customization and scalability further underscores the transformative impact of these software solutions in maintaining high safety and quality standards in various industries.

Market Challenges: Lack of Skilled Personnel and Training Facilities

Conducting non-destructive testing (NDT) inspections is a task that necessitates personnel who are not only highly skilled but also appropriately certified. This is crucial because NDT processes involve sophisticated techniques used to evaluate the properties of a material, component, or system without causing damage. The effectiveness and reliability of these inspections heavily depend on the expertise and

proficiency of the inspectors.

Market Opportunities: Technological Advancements in NDT Inspections

Technology, science, and engineering advancements are continuously refining non-destructive testing (NDT) methods. Integrating digitalization and automation is revolutionizing these methods through sophisticated sensors, advanced software, algorithms, and artificial intelligence. These innovations facilitate data gathering, processing, storage, and analysis, significantly enhancing NDT procedures' speed, accuracy, and consistency. This technological leap minimizes human error and bias and allows remote and online testing, monitoring, and reporting.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of services available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the Europe non-destructive testing (NDT) services market by services on the basis of type ultrasonic testing, radiographic testing, eddy current testing, magnetic particle testing, penetrant testing, visual testing, and leak detection testing and on the basis of application, the market has been segmented into automotive and aviation, construction and infrastructure, energy and power generation, industry assets, oil, gas, and chemicals, process industry, and utilities.

Growth/Marketing Strategy: The Europe non-destructive testing (NDT) services market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been merger and acquisition to strengthen their position in the Europe non-destructive testing (NDT) services market. For instance, in October 2023, T?V Rheinland acquired Burotec, a Madrid-based multinational firm that provides comprehensive, turnkey services in quality control, product inspection, technical auditing, occupational and industrial safety services, engineering, and project management in any location globally. T?V Rheinland's expansion plan matches the purchase, notably in the energy and environmental industries. This transaction would considerably broaden and improve T?V Rheinland's service range in Spain, opening up new development potential in the non-statutory local inspection sector.

Competitive Strategy: Key players in the Europe non-destructive testing (NDT) services market analyzed and profiled in the study involve major NDT services offering

companies. Moreover, a detailed competitive benchmarking of the players operating in the Europe non-destructive testing (NDT) services market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, have been employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been done to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, has been extracted for each company from secondary sources and databases. Revenues specific to product/service/technology were then estimated based on fact-based proxy indicators as well as primary inputs.

Based on the classification, the average selling price (ASP) has been calculated using the weighted average method.

The currency conversion rate has been taken from the historical exchange rate of Oanda and/or other relevant websites.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The term “product” in this document may refer to “service” or “technology” as and where relevant.

The term “manufacturers/suppliers” may refer to “service providers” or “technology providers” as and where relevant.

Primary Research

The primary sources involve industry experts from the NDT industry, including non-destructive testing equipment providers and NDT service providers. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as Businessweek and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites.

Secondary research was done to obtain critical information about the industry's value chain, the market's monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights gathered from primary experts.

The Europe non-destructive testing (NDT) services market comprises key players who have established themselves thoroughly and have the proper understanding of the market, accompanied by start-ups looking forward to establishing themselves in this highly competitive market. In 2022, the Europe non-destructive testing (NDT) services market was dominated by established players, accounting for 90% of the market share, whereas start-ups managed to capture 10% of the market. With the growing need for

advanced non-destructive testing equipments and quality assurance in various industries, the Europe non-destructive testing (NDT) services market is expected to see significant expansion. This growth is driven by the increasing demand for maintaining safety standards, enhancing product reliability, and adhering to stringent regulatory requirements across sectors such as aerospace, automotive, construction, and energy.

Some prominent names established in this market are:

Kiwa

Force Technology

Testia

Waygate Technologies

Applus+

DEKRA INDUSTRIAL AB

Intertek Group plc

ZEISS Group

Capital NDT

Ultramag Inspection Services

TeraTonics S.A.S.

T?V Rheinland

TWI Ltd.

Contents

Executive Summary

Scope of the Study

1 MARKET

1.1 Industry Outlook

1.1.1 Europe Non-Destructive Testing Services Market: Overview

1.2 Evolving Technological Trends and Disruptions in Non-Destructive Testing Services

1.2.1 Computed Tomography (CT) for 3D Reconstruction of the Test Parts

1.2.2 Integration of IoT and Cloud-Based Services

1.2.3 Integration of Nanotechnology

1.2.4 Drone-Based Enabled NDT Inspection

1.2.5 Green NDT

1.3 Evolving End-User Requirements for Non-Destructive Testing

1.4 Trends in the Supply of NDT Services for Bulk Testing

1.5 Opportunities for Advanced Technologies in NDT

1.5.1 Digitalization in the Automotive and Aviation

1.5.2 Digitalization in the Construction and Infrastructure

1.5.3 Digitalization in Energy and Power Generation

1.5.4 Digitalization in the Oil, Gas, and Chemicals

1.6 Business Dynamics

1.6.1 Business Drivers

1.6.1.1 Evolving Software Solutions to Simplify the Inspection Process of NDT

1.6.1.1.1 Integration of Artificial Intelligence (AI) and Machine learning in NDT

1.6.1.2 Increasing Use of Composite Materials across Various Industries to Boost the

Need for Emerging NDT Techniques

1.6.1.3 Stringent Safety Regulations

1.6.2 Business Challenges

1.6.2.1 Lack of Skilled Personnel and Training Facilities

1.6.2.2 High Cost of NDT Equipment

1.6.3 Business Strategies

1.6.3.1 New Product Launch

1.6.4 Corporate Strategies

1.6.4.1 Partnerships, Collaborations, Agreements, Contracts, and Others

1.6.4.2 Mergers and Acquisitions

1.6.5 Business Opportunities

1.6.5.1 Technological Advancements in NDT Inspections

- 1.6.5.1.1 Nanobots for Inspection
- 1.6.5.1.2 Bendable X-Ray Detectors
- 1.6.5.1.3 Digital Radiography
- 1.6.5.1.4 Terahertz NDE
- 1.6.5.1.5 Infrared Thermography

2 SERVICES

2.1 Europe Non-Destructive Testing (NDT) Services Market (by Type)

2.1.1 Market Overview

2.1.1.1 Demand Analysis of Europe Non-Destructive Testing (NDT) Services Market (by Type)

- 2.1.2 Ultrasonic Testing
- 2.1.3 Radiographic Testing
- 2.1.4 Eddy Current Testing
- 2.1.5 Magnetic Particle Testing
- 2.1.6 Penetrant Testing
- 2.1.7 Visual Testing
- 2.1.8 Leak Detection Testing

2.2 Europe Non-Destructive Testing (NDT) Services Market (by Application)

2.2.1 Market Overview

2.2.1.1 Demand Analysis for Europe Non-Destructive Testing (NDT) Services Market (by Application)

- 2.2.2 Automotive and Aviation
- 2.2.3 Construction and Infrastructure
- 2.2.4 Energy and Power Generation
- 2.2.5 Industry Assets
- 2.2.6 Oil, Gas, and Chemicals
- 2.2.7 Process Industry
- 2.2.8 Utilities

3 REGION

3.1 Europe

3.1.1 Markets

- 3.1.1.1 Key Service Providers in Europe
- 3.1.1.2 Business Drivers
- 3.1.1.3 Business Challenges

3.1.2 Europe (by Country)

3.1.2.1 Germany

3.1.2.1.1 Market

3.1.2.1.1.1 Key Service Providers in Germany

3.1.2.1.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Germany

3.1.2.2 France

3.1.2.2.1 Market

3.1.2.2.1.1 Key Service Providers in France

3.1.2.2.1.2 Non-Destructive Testing (NDT) Trends and Challenges in France

3.1.2.3 U.K.

3.1.2.3.1 Market

3.1.2.3.1.1 Key Service Providers in the U.K.

3.1.2.3.1.2 Non-Destructive Testing (NDT) Trends and Challenges in U.K.

3.1.2.4 Spain

3.1.2.4.1 Market

3.1.2.4.1.1 Key Service Providers in Spain

3.1.2.4.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Spain

3.1.2.5 Switzerland

3.1.2.5.1 Market

3.1.2.5.1.1 Key Service Providers in Switzerland

3.1.2.5.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Switzerland

3.1.2.6 Finland

3.1.2.6.1 Market

3.1.2.6.1.1 Key Service Providers in Finland

3.1.2.6.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Finland

3.1.2.7 Belgium

3.1.2.7.1 Market

3.1.2.7.1.1 Key Service Providers in Belgium

3.1.2.7.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Belgium

3.1.2.8 Italy

3.1.2.8.1 Market

3.1.2.8.1.1 Key Service Providers in Italy

3.1.2.8.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Italy

3.1.2.9 Norway

3.1.2.9.1 Market

3.1.2.9.1.1 Key Service Providers in Norway

3.1.2.9.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Norway

3.1.2.10 Sweden

3.1.2.10.1 Market

3.1.2.10.1.1 Key Service Providers in Sweden

- 3.1.2.10.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Sweden
- 3.1.2.11 Netherlands
 - 3.1.2.11.1 Market
 - 3.1.2.11.1.1 Key Service Providers in the Netherlands
 - 3.1.2.11.1.2 Non-Destructive Testing (NDT) Trends and Challenges in the Netherlands
- 3.1.2.12 Austria
 - 3.1.2.12.1 Market
 - 3.1.2.12.1.1 Key Service Providers in Austria
 - 3.1.2.12.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Austria
- 3.1.2.13 Hungary
 - 3.1.2.13.1 Market
 - 3.1.2.13.1.1 Key Service Providers in Hungary
 - 3.1.2.13.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Hungary
- 3.1.2.14 Romania
 - 3.1.2.14.1 Market
 - 3.1.2.14.1.1 Key Service Providers in Romania
 - 3.1.2.14.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Romania
- 3.1.2.15 Bulgaria
 - 3.1.2.15.1 Market
 - 3.1.2.15.1.1 Key Service Providers in Bulgaria
 - 3.1.2.15.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Bulgaria
- 3.1.2.16 Türkiye
 - 3.1.2.16.1 Market
 - 3.1.2.16.1.1 Key Service Providers in Türkiye
 - 3.1.2.16.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Türkiye
- 3.1.2.17 Estonia
 - 3.1.2.17.1 Markets
 - 3.1.2.17.1.1 Key Service Providers in Estonia
 - 3.1.2.17.1.2 Non-Destructive Testing (NDT) Trends and Challenges in Estonia
- 3.1.2.18 Rest-of-Europe
 - 3.1.2.18.1 Market
 - 3.1.2.18.1.1 Key Service Providers in the Rest-of-Europe

4 MARKET – COMPETITIVE BENCHMARKING & COMPANY PROFILES

- 4.1 Market Share Analysis
- 4.2 Kiwa
 - 4.2.1 Company Overview

- 4.2.1.1 Role of Kiwa in the Europe Non-Destructive Testing (NDT) Services Market
- 4.2.1.2 Service Portfolio
- 4.2.2 SWOT Analysis
 - 4.2.2.1 Analyst View
- 4.3 FORCE Technology
 - 4.3.1 Company Overview
 - 4.3.1.1 Role of FORCE Technology in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.3.1.2 Service Portfolio
 - 4.3.2 Corporate Strategies
 - 4.3.2.1 Partnerships, Collaborations, Contracts, and Agreements
 - 4.3.3 SWOT Analysis
 - 4.3.3.1 Analyst View
- 4.4 Testia
 - 4.4.1 Company Overview
 - 4.4.1.1 Role of Testia in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.4.1.2 Service Portfolio
 - 4.4.2 Corporate Strategies
 - 4.4.2.1 Partnerships, Collaborations, Contracts, and Agreements
 - 4.4.3 Business Strategies
 - 4.4.3.1 Market Developments
 - 4.4.4 SWOT Analysis
 - 4.4.4.1 Analyst View
- 4.5 Waygate Technologies
 - 4.5.1 Company Overview
 - 4.5.1.1 Role of Waygate Technologies in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.5.1.2 Service Portfolio
 - 4.5.2 Corporate Strategies
 - 4.5.2.1 Partnerships, Collaborations, Contracts, and Agreements
 - 4.5.3 Business Strategies
 - 4.5.3.1 Market Developments
 - 4.5.4 SWOT Analysis
 - 4.5.4.1 Analyst View
- 4.6 Applus+
 - 4.6.1 Company Overview
 - 4.6.1.1 Role of Applus+ in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.6.1.2 Service Portfolio

- 4.6.2 Corporate Strategies
 - 4.6.2.1 Partnerships, Collaborations, Contracts, and Agreements
- 4.6.3 Business Strategies
 - 4.6.3.1 Market Developments
- 4.6.4 SWOT Analysis
 - 4.6.4.1 Analyst View
- 4.7 DEKRA INDUSTRIAL AB
 - 4.7.1 Company Overview
 - 4.7.1.1 Role of DEKRA INDUSTRIAL AB in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.7.1.2 Service Portfolio
- 4.7.2 Business Strategies
 - 4.7.2.1 Market Developments
- 4.7.3 SWOT Analysis
 - 4.7.3.1 Analyst View
- 4.8 Intertek Group plc
 - 4.8.1 Company Overview
 - 4.8.1.1 Role of Intertek Group plc in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.8.1.2 Service Portfolio
- 4.8.2 Corporate Strategies
 - 4.8.2.1 Partnerships, Collaborations, Contracts, and Agreements
- 4.8.3 Business Strategies
 - 4.8.3.1 Market Developments
- 4.8.4 SWOT Analysis
 - 4.8.4.1 Analyst View
- 4.9 ZEISS Group
 - 4.9.1 Company Overview
 - 4.9.1.1 Role of ZEISS Group in the Europe Non-Destructive Testing (NDT) Services Market
 - 4.9.1.2 Service Portfolio
- 4.9.2 Corporate Strategies
 - 4.9.2.1 Partnerships, Collaborations, Contracts, and Agreements
- 4.9.3 Business Strategies
 - 4.9.3.1 Market Developments
- 4.9.4 SWOT Analysis
 - 4.9.4.1 Analyst View
- 4.1 Capital NDT
 - 4.10.1 Company Overview

4.10.1.1 Role of Capital NDT in the Europe Non-Destructive Testing (NDT) Services Market

4.10.1.2 Service Portfolio

4.10.2 SWOT Analysis

4.10.2.1 Analyst View

4.11 Ultramag Inspection Services

4.11.1 Company Overview

4.11.1.1 Role of Ultramag Inspection Services in the Europe Non-Destructive Testing (NDT) Services Market

4.11.1.2 Service Portfolio

4.11.2 Corporate Strategies

4.11.2.1 Partnerships, Collaborations, Contracts, and Agreements

4.11.3 SWOT Analysis

4.11.3.1 Analyst View

4.12 TeraTonics S.A.S.

4.12.1 Company Overview

4.12.1.1 Role of TeraTonics S.A.S. in the Europe Non-Destructive Testing (NDT) Services Market

4.12.1.2 Service Portfolio

4.12.2 SWOT Analysis

4.12.2.1 Analyst View

4.13 T?V Rheinland

4.13.1 Company Overview

4.13.1.1 Role of T?V Rheinland in the Europe Non-Destructive Testing (NDT) Services Market

4.13.1.2 Service Portfolio

4.13.2 Corporate Strategies

4.13.2.1 Partnerships, Collaborations, Contracts, and Agreements

4.13.3 Business Strategies

4.13.3.1 Market Developments

4.13.4 SWOT Analysis

4.13.4.1 Analyst View

4.14 TWI Ltd.

4.14.1 Company Overview

4.14.1.1 Role of TWI Ltd. in the Europe Non-Destructive Testing (NDT) Services Market

4.14.1.2 Service Portfolio

4.14.2 Business Strategies

4.14.2.1 Market Developments

4.14.3 SWOT Analysis

4.14.3.1 Analyst View

5 GROWTH OPPORTUNITIES AND RECOMMENDATIONS

5.1 Growth Opportunities

5.1.1 Growth Opportunity: Increasing Need for Digital Storage and Sharing of Data

5.1.1.1 Recommendations

5.1.2 Growth Opportunity: Vertical Integration of Testing in the Space Industry

5.1.2.1 Recommendations

6 RESEARCH METHODOLOGY

6.1 Factors for Data Prediction and Modeling

List Of Figures

LIST OF FIGURES

Figure 1: Europe Non-Destructive Testing (NDT) Services Market, \$Million, 2022-2033

Figure 2: Europe Non-Destructive Testing (NDT) Services Market (by Type), \$Million, 2022 and 2033

Figure 3: Europe Non-Destructive Testing (NDT) Services Market (by Application), \$Million, 2022 and 2033

Figure 4: Europe Non-Destructive Testing (NDT) Services Market Coverage

Figure 5: Europe Non-Destructive Testing (NDT) Services Market, Business Dynamics

Figure 6: Share of Key Business Strategies and Developments, January 2020-November 2023

Figure 7: Europe Non-Destructive Testing (NDT) Services Market (by Type)

Figure 8: Europe Non-Destructive Testing (NDT) Services Market (by Application)

Figure 9: Europe Non-Destructive Testing (NDT) Services Share (by Company), \$Million, 2022

Figure 10: Research Methodology

Figure 11: Top-Down and Bottom-Up Approach

Figure 12: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: New Product Launches, Developments, and Others, January 2020-October 2023

Table 2: Partnerships, Collaborations, Agreements, Contracts, and Others, January 2020-November 2023

Table 3: Europe Non-Destructive Testing (NDT) Services Market (by Type), \$Million, 2022-2033

Table 4: Difference between Non-Destructive Testing (NDT) Services

Table 5: Europe Non-Destructive Testing (NDT) Services Market (by Application), \$Million, 2023-2033

Table 6: Kiwa: Service Portfolio

Table 7: FORCE Technology: Service Portfolio

Table 8: FORCE Technology: Partnerships, Collaborations, Contracts, and Agreements

Table 9: Testia: Service Portfolio

Table 10: Testia: Partnerships, Collaborations, Contracts, and Agreements

Table 11: Testia: Market Developments

Table 12: Waygate Technologies: Service Portfolio

Table 13: Waygate Technologies: Partnerships, Collaborations, Contracts, and Agreements

Table 14: Waygate Technologies: Market Developments

Table 15: Applus+: Service Portfolio

Table 16: Applus+: Partnerships, Collaborations, Contracts, and Agreements

Table 17: Applus+: Market Developments

Table 18: DEKRA INDUSTRIAL AB: Service Portfolio

Table 19: DEKRA INDUSTRIAL AB: Market Developments

Table 20: Intertek Group plc: Service Portfolio

Table 21: Intertek Group plc: Partnerships, Collaborations, Contracts, and Agreements

Table 22: Intertek Group plc: Market Developments

Table 23: ZEISS Group: Service Portfolio

Table 24: ZEISS Group: Partnerships, Collaborations, Contracts, and Agreements

Table 25: ZEISS Group: Market Developments

Table 26: Capital NDT: Service Portfolio

Table 27: Ultramag Inspection Services: Service Portfolio

Table 28: Ultramag Inspection Services: Partnerships, Collaborations, Contracts, and Agreements

Table 29: TeraTonics S.A.S.: Service Portfolio

Table 30: T?V Rheinland: Service Portfolio

Table 31: T?V Rheinland: Partnerships, Collaborations, Contracts, and Agreements

Table 32: T?V Rheinland: Market Developments

Table 33: TWI Ltd.: Service Portfolio

Table 34: TWI Ltd.: Market Developments

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