

Global Assurance, Testing, Inspection and Certification (ATIC) Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Assurance, Testing, Inspection and Certification (ATIC) Services market size is expected to reach \$ 272284 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

Assurance, Testing, Inspection and Certification Services refer to fee-based quality, safety, compliance, performance and risk management services provided to businesses, government entities and other external clients by independent third-party organizations or conformity assessment bodies with independent professional capabilities. Assurance services provide independent evaluation and risk assurance for business operations, management systems, supply chains, sustainability claims and related activities through audits, assessments, verification, validation, risk analysis and supply chain evaluation; testing services use laboratory or field-based methods to determine the chemical, physical, biological, electrical, safety, performance, reliability and other characteristics of products, materials, components, samples or systems and assess their conformity with applicable standards, regulations or technical requirements; inspection services verify the quality, quantity, specifications, safety and condition of products, commodities, equipment, assets, facilities, projects and production or operating processes through on-site examination, measurement, witnessing, sampling and professional judgment; and certification services provide formal assessment and confirmation by qualified bodies that products, services, processes, management systems, persons or facilities conform to applicable regulations, standards, specifications or other defined requirements. Demand for these services may be driven by regulatory and market-access requirements, contractual or buyer requirements, or voluntary quality and risk management needs, and spans industries including consumer products and technology, food and life sciences, industrial and manufacturing, energy

and natural resources, automotive and transportation, and buildings and infrastructure. This report primarily covers externally purchased Assurance, Testing, Inspection and Certification services that generate commercial service revenue, while excluding internally performed quality control and testing, government regulatory or enforcement activities that do not generate market-based service revenue, accreditation of conformity assessment bodies, and standalone standards development, training, software and general management consulting that do not result in an Assurance, Testing, Inspection or Certification deliverable.

Key Findings

Testing remains the largest service category across diversified ATIC portfolios and global laboratory networks

Regulatory and mandatory compliance provides the most resilient demand base across regulated industries and market-access activities

Digital trust cybersecurity AI conformity assessment and sustainability assurance are rapidly expanding ATIC service areas

Europe is assessed as the largest mature regional market while Asia Pacific is a major incremental growth engine

The market remains fragmented despite the scale and global networks of leading multi-service providers

Market Trends

The ATIC industry is moving from stand-alone testing or certificate issuance toward integrated, lifecycle-based assurance covering product development, suppliers, manufacturing, trade, operations and sustainability performance. Large providers are increasingly combining physical laboratories and field inspection networks with digital workflow platforms, remote assessment, data analytics, cybersecurity assessment and AI-enabled technical services. Digital trust is becoming an important extension of conventional product compliance as connected products, software and AI systems face new requirements for cybersecurity, documentation, traceability and conformity

assessment; the EU AI Act and Cyber Resilience Act illustrate this shift toward formal quality and compliance frameworks for digital products. Sustainability-related assurance is also broadening beyond conventional management-system certification into greenhouse-gas verification, supply-chain audits, lifecycle assessment and process certification. At the same time, portfolio management is becoming more active: providers are allocating capital toward cybersecurity, renewable energy, nuclear, energy-transition and specialized high-value testing while using acquisitions to add technical competencies, accreditations and geographic density. This favors integrated ATIC platforms able to combine global standards knowledge with local accreditation, laboratories and industry-specific expertise.

Market Dynamics

Drivers

ATIC demand is fundamentally supported by the expansion and increasing technical complexity of regulations, standards and buyer requirements. Manufacturers must demonstrate conformity across more markets while product architectures increasingly combine mechanical, electrical, chemical, software and cybersecurity requirements. Globalized and frequently reconfigured supply chains also raise the need for supplier qualification, factory audits, source inspection, commodity verification and independent testing. Electrification, batteries, renewable energy, critical minerals, food safety, medical devices and digital products create additional technical requirements that cannot always be economically maintained in-house, reinforcing outsourcing to accredited specialists. In 2025 SGS recorded particularly strong growth in areas including product safety, EV-related connectivity, contaminants testing, greenhouse-gas verification, supply-chain audits and digital-trust certification, illustrating how both traditional regulation and newer risk categories are supporting demand.

Restraints

The market is constrained by price competition in standardized testing and certification, customer insourcing where testing volumes are sufficiently large, fragmented national accreditation and regulatory requirements, and the cost of maintaining laboratories, reference methods, technical personnel and multiple accreditations. Some compliance markets can also contract when governments simplify regulation or narrow reporting obligations. The EU's 2026 sustainability simplification package materially reduced the

number of companies subject to mandatory CSRD reporting, illustrating how policy changes can lower near-term mandatory assurance volumes even when sustainability verification remains commercially relevant. Mature commodity testing and conventional inspection categories can also face slower underlying growth and margin pressure, encouraging providers to reallocate capital toward higher-growth technical services.

Opportunities

The strongest opportunities are developing where new technologies create risks that existing conformity frameworks must absorb. Cybersecurity and digital-product compliance are becoming formal conformity-assessment markets, while high-risk AI systems introduce requirements around quality management, technical documentation, testing and notified-body assessment. Energy transition creates additional opportunities across renewables, grid infrastructure, batteries, hydrogen, nuclear, critical minerals and carbon-related verification. Sustainability assurance remains an opportunity despite narrower mandatory European reporting scope because supply-chain requirements, voluntary reporting, product environmental claims and greenhouse-gas verification continue to generate third-party demand. Providers with laboratories, certification capabilities and industry specialists can also cross-sell multiple services across the same client lifecycle, improving customer retention and raising revenue per client.

Challenges

The principal challenge is maintaining technical competence and independence while regulations and technologies change faster than traditional accreditation and laboratory investment cycles. Providers must recruit and retain engineers, auditors, chemists, cybersecurity specialists and sector experts, while simultaneously investing in laboratories, digital platforms, information security and new accreditation scopes. AI-enabled and remote assessment can improve productivity but also create requirements for data integrity, traceability, cybersecurity and defensible technical judgment. Geopolitical fragmentation and supply-chain relocation further increase the number of local rules and duplicated certifications that global providers must manage. The competitive advantage therefore increasingly depends not only on laboratory capacity, but also on recognized accreditation, specialized expertise, data governance, geographic coverage and the ability to convert new regulatory requirements into repeatable service offerings quickly.

Value Chain Analysis

The ATIC value chain begins with the regulatory and normative infrastructure formed by legislation, international and national standards, accreditation systems, technical specifications and customer requirements, together with enabling inputs such as laboratory instruments, reference materials, measurement systems, software platforms and specialized technical talent. Service providers transform these inputs into laboratory tests, audits, inspections, verification reports and certification decisions through accredited facilities, qualified personnel, standardized procedures and independent technical judgment. Value creation is strongest where providers combine recognized competence with global laboratory and inspection networks, allowing multinational customers to use consistent programs across multiple markets. Downstream demand comes from manufacturers, brand owners, retailers, commodity traders, energy and infrastructure operators, construction companies, automotive and transportation groups, food and life-science companies and public-sector clients. Recurring surveillance audits, periodic asset inspection, certification renewal and continuous supplier monitoring create recurring revenue, while new product launches, market entry, capital projects and regulatory changes generate project-based demand.

Segment Insights

By service type, Testing is the broadest revenue pool because it supports product development, compliance, production control and market access across virtually all customer industries. Inspection is particularly important in commodities, industrial assets, construction, energy and trade, while Assurance is gaining importance as customers seek independent evaluation of supply chains, sustainability claims, information security and broader operational risks. Certification generally represents a smaller share of diversified ATIC portfolios but benefits from recurring surveillance and renewal cycles.

By demand driver, regulatory and mandatory compliance remains the most defensive segment because services are linked directly to legal requirements, regulated market access and safety obligations. Contractual and buyer-mandated services are especially important in global consumer, retail, food and manufacturing supply chains, where supplier audits and pre-shipment or production inspections protect brand owners and purchasers. Voluntary assurance and best-practice services are structurally smaller but increasingly important in sustainability, cybersecurity, operational resilience and supply-chain transparency. By value-chain stage, sourcing, manufacturing and construction

generate large recurring testing and inspection volumes, while R&D and design support higher-value pre-compliance work and operations and maintenance generate recurring asset integrity and periodic inspection demand.

Downstream Market Opportunities

Consumer Products & Retail remains a major demand base for product safety, chemical compliance, supplier inspection and responsible-sourcing audits, while technology products are increasingly adding cybersecurity and digital-trust requirements. Food & Life Sciences generates recurring laboratory demand because contamination, quality, pharmaceutical, medical-device and certification requirements remain highly regulated. Industrial & Manufacturing and Buildings & Infrastructure create broad opportunities for materials testing, NDT, equipment inspection, construction control and management-system certification. Energy & Natural Resources is being reshaped by renewables, critical minerals, power grids, hydrogen and nuclear investment, while Automotive & Transportation is adding battery, EV, electronics, connectivity and software-related testing to conventional vehicle safety and homologation. These emerging technical layers allow established providers to increase service intensity per customer rather than relying solely on growth in the number of physical tests performed.

Regional Insights

This study assesses Europe as the largest mature regional ATIC market, supported by a dense industrial base, extensive product and sustainability regulation, a highly developed accreditation infrastructure and the presence of many of the world's largest TIC groups. Europe represented 52% of Eurofins' reported 2025 revenue, while it was also SGS's largest Testing & Inspection region, narrowly ahead of Asia Pacific. Asia Pacific is one of the strongest incremental growth markets, supported by electronics and consumer-product manufacturing, EV and battery investment, export compliance, supply-chain relocation and expanding domestic quality infrastructure; SGS's Testing & Inspection sales grew 7.7% organically in Asia Pacific in 2025. North America remains a large high-value market in industrial safety, aerospace, life sciences, product certification and digital trust, while the Middle East is benefiting from energy, infrastructure and industrial investment. Global providers increasingly combine international certification recognition with local laboratories and country-specific regulatory expertise to compete across these regions.

Competitive Landscape Analysis

The global competitive landscape combines large diversified ATIC networks with regional leaders and technically specialized providers. SGS, Bureau Veritas, Eurofins, DEKRA, Intertek, TÜV SÜD, TÜV Rheinland, DNV, UL Solutions, ALS, TÜV NORD, Kiwa and Applus+ form a major global group with broad laboratories, inspection networks, certification capabilities and multinational customer coverage, while Apave and SOCOTEC have become increasingly significant international competitors in industrial, infrastructure and risk-management services. BSI, RINA, Cotecna, QIMA, AmSpec, NSF, CSA Group, TÜV AUSTRIA and Control Union provide strong positions in certification, commodities, consumer supply chains, food, product safety and selected vertical markets, while CCIC, CTI, GRGTEST and CTC strengthen the competitive depth of the Chinese market. Scale remains important: SGS reported CHF6.945 billion of 2025 sales, Bureau Veritas €6.466 billion, Eurofins €7.296 billion of group revenue and Intertek \$3.43 billion; Bureau Veritas and Intertek delivered 2025 adjusted operating margins of 16.3% and 18.1%, respectively, demonstrating the operating leverage available to scaled networks. M&A remains a core competitive tool: Bureau Veritas expanded in cybersecurity, nuclear and transition services in 2025, SGS completed its acquisition of Applied Technical Services in early 2026, Apave reached nearly €1.9 billion of 2025 revenue after a multi-year acquisition program, and SOCOTEC continued building its materials-testing and infrastructure platform. Competition is therefore shifting from simple laboratory capacity toward portfolio breadth, specialist expertise, accreditation coverage, digital capabilities and the ability to serve clients consistently across multiple jurisdictions.

Report Scope

This report studies the global Assurance, Testing, Inspection and Certification (ATIC) Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Assurance, Testing, Inspection and Certification (ATIC) Services, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Assurance, Testing, Inspection and Certification (ATIC) Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Assurance, Testing, Inspection and Certification (ATIC) Services total market, 2021-2032, (USD Million)

Global Assurance, Testing, Inspection and Certification (ATIC) Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Assurance, Testing, Inspection and Certification (ATIC) Services total market, key domestic companies, and share, (USD Million)

Global Assurance, Testing, Inspection and Certification (ATIC) Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Assurance, Testing, Inspection and Certification (ATIC) Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Assurance, Testing, Inspection and Certification (ATIC) Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Assurance, Testing, Inspection and Certification (ATIC) Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include SGS, Bureau Veritas, Eurofins, DEKRA, Intertek, TÜV SÜD, TÜV Rheinland, DNV, UL Solutions, ALS, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Assurance, Testing, Inspection and Certification (ATIC) Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Assurance, Testing, Inspection and Certification (ATIC) Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Assurance, Testing, Inspection and Certification (ATIC) Services Market, Segmentation by Type:

Assurance Services

Testing Services

Inspection Services

Certification Services

Global Assurance, Testing, Inspection and Certification (ATIC) Services Market, Segmentation by Demand Driver:

Regulatory & Mandatory Compliance Services

Contractual & Buyer-Mandated Services

Voluntary Assurance & Best-Practice Services

Global Assurance, Testing, Inspection and Certification (ATIC) Services Market, Segmentation by Value Chain Stage:

R&D & Design Stage

Sourcing & Procurement Stage

Manufacturing & Construction Stage

Trade & Distribution Stage

Operation & Maintenance Stage

Global Assurance, Testing, Inspection and Certification (ATIC) Services Market, Segmentation by Application:

Consumer Products & Retail

Food & Life Sciences

Industrial & Manufacturing

Energy & Natural Resources

Automotive & Transportation

Buildings & Infrastructure

Others

Companies Profiled:

SGS

Bureau Veritas

Eurofins

DEKRA

Intertek

TÜV SÜD

TÜV Rheinland

DNV

UL Solutions

ALS

Apave

SOCOTEC

TÜV NORD

Kiwa

RINA

BSI

Cotecna

QIMA

AmSpec

NSF

CSA Group

TÜV AUSTRIA

Control Union

Applus+

CCIC

CTI

GRGTEST

CTC

Key Questions Answered

1. How big is the global Assurance, Testing, Inspection and Certification (ATIC) Services market?
2. What is the demand of the global Assurance, Testing, Inspection and Certification (ATIC) Services market?
3. What is the year over year growth of the global Assurance, Testing, Inspection and Certification (ATIC) Services market?
4. What is the total value of the global Assurance, Testing, Inspection and Certification (ATIC) Services market?
5. Who are the Major Players in the global Assurance, Testing, Inspection and Certification (ATIC) Services market?

6. What are the growth factors driving the market demand?

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