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Key Trends In The European EMC Market

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Electromagnetic interference (EMI) is caused by the unintentional generation of electrical signals by electronic equipment. This interference can harm people and even cause equipment to malfunction depending on its strength. It is important to keep equipment electromagnetically compatible with the environment and other equipment to mitigate pollution caused by EMI.

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Equipment intended for free trade across the European Union should achieve the “Conformité Européenne” and carry the CE mark of certification, as governed by a set of regulations comprehensively covered in EMC Directive 2004/108/EC. Only equipment bearing the CE mark can be bought and sold inside of Europe.

The European electromagnetic compatibility (EMC) market can be segmented into three very broad areas: EMC testing service providers, EMC test and measurement equipment manufacturers, and manufacturers of other devices that make products electromagnetically compliant such as filters, capacitors, connectors, and RF chokes.

Market Growth Overview

Unlike most other business verticals, the EMC market was not significantly affected by the European financial crisis, since it is very focused on research & development. Expenditures on research & development were not adversely as affected as manufacturing expenses during the crisis. The EMC testing service industry saw an increase in activity from manufacturers that wanted to innovate and outsource their projects due to a lack of funds as a result of the fallout from the crisis.

Other drivers for the European EMC market include new enhancements in wireless communications and its integration into segments that were not wireless previously. This trend is expected to increase frequency bandwidth and therefore noise and interference affecting the EMC business positively as there would be a higher requirement for EMC test equipment and testing services.

Innovative automotive electronics, especially with electric vehicles, also are expected to drive the market. This is a relatively new growth driver to the EMC market and would require these companies to establish new labs and invest in new equipment and new standards for measurement.

This being said, the EMC market in Europe is very well established and highly regulated. Many experts believe that unlike the previous decade and its considerable growth, the EMC market has reached a plateau and will not witness tremendous growth anymore. The market is mainly sustained by the introduction of new and innovative products that need to be

certified against regulations specified by the European Commission.

However, the market is growing in Eastern Europe. Many companies in this region are trying to enter the European market. They would therefore have to certify their products according to the standards set forth by the European Union. One could expect to witness more demand for EMC testing service providers as well as EMC testing equipment as a result.

Competitive Landscape

Some of the most significant participants in the European EMC testing and measurement segment include Rohde & Schwarz, Agilent Technologies, and Teseq AG, along with smaller companies like Frankonia Group, EM Test AG, and Gauss Instruments. Rohde & Schwarz is the leader in this segment in Europe by a very significant margin. In the last few years, there has been a lot of volatility with regard to the number of participants inside this space. For example, companies like Anritsu and Tektronix, which were active some time ago, have left. Agilent Technologies, on the other hand, was momentarily inactive but is now an active participant.

The European Electromagnetic Compatibility testing service providers segment, unlike the test and measurement equipment segment, is very fragmented. It consists of in-house laboratories and independent companies that provide EMC testing for OEMs of a broad range of products involving electronics. Companies like Fujitsu have in-house laboratories and also offer EMC testing services to external participants. Major participants that provide EMC testing services to other companies include but are not limited to Intertek, SGS, Bureau Veritas, Underwriters Laboratories, TUV-SUD, TUV Rheinland, and DEKRA.

Final Word

Based upon these factors, the growth in this industry across the European region will be moderate over the next few years. New technological breakthroughs and enhancements would require EMC testing equipment that is more efficient than what is available today. There also could be a gradual shift from in-house laboratories to independent companies offering EMC testing services. As EMC testing service providers are regionally based, we could see new EMC testing labs establishing themselves in Eastern Europe, which would in turn drive demand for EMC test and measurement equipment.

Frost & Sullivan is currently performing research on the European EMC test equipment and testing services market. To participate in this research, contact analyst Rohan Thomas at rohant@frost.com. You may also provide insights via the online survey at www.zipsurvey.com/LaunchSurvey.aspx?suid=65909&key=82252EBD. The survey will close on October 25, 2013.

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