

# The ISO Survey of Management System Standard Certifications – 2014

## Executive summary

ISO has just released the results of its 2014 Survey of Certifications\*. This is an annual study showing the number of valid certificates to 8 ISO management standards reported for each country, each year.

A summary of the statistics is shown in the table below.

Standard	number of certificates in 2014	number of certificates in 2013	evolution	evolution in %
ISO 9001	1 138 155	1 126 460	11 695	1 %
ISO 14001	324 148	301 622	22 526	7 %
ISO 50001	6 778	4 826	1 952	40 %
ISO/IEC 27001	23 972	22 349	1 623	7 %
ISO 22000	30 500	26 847	3 653	14 %
ISO/TS 16949	57 950	53 723	4 227	8 %
ISO 13485	27 791	25 655	2 136	8 %
ISO 22301	1 757			
<b>TOTAL</b>	<b>1 609 294</b>	<b>1 561 482</b>	<b>47 812</b>	<b>3 %</b>

\* Despite our best efforts to display consistent results, there are fluctuations in the number of certificates from year to year due to:

- The variability in numbers of certificates reported each year by individual certification bodies
- Inconsistent participation of some certification bodies that contribute to the survey one year but not the next
- The participation of new certification bodies

### Main trends

With 1 609 294 certificates issued worldwide in 2014, slightly up on the previous year, the latest edition demonstrates moderate growth for almost all the ISO management systems standards covered by the survey, confirming trends observed over the last two years.

This market stabilization is, however, offset by three good performers exhibiting more sustained growth. Albeit less impressive than in previous years, ISO 50001 for energy management demonstrates a 40 % growth rate, led once again by Germany, responsible for 50 % of the 6 778 certificates reported. Similarly, food management standard ISO 22000 continues to deliver reliable performance with a 14 % growth rate, while ISO 16949 for the automotive sector shows accelerated progression with a commendable 8 %, signalling that economic recovery in the auto industry is holding up.

With 1 % and 7 % respectively, ISO's flagship standards ISO 9001 (quality management) and ISO 14001 (environmental management) are gradually reaching stability although, as

the cornerstones of the management system, it is also important to note that new extensively revised editions of both of these standards have been launched in 2015.

Finally, big news this year is the inclusion of a newcomer – ISO 22301 for business continuity – into the survey, motivated by a global awareness that organizations need to protect themselves against disruption in times of crisis. The new recruit made a timid breakthrough with 1 700 certificates, but is thought to hold good potential for the future.

## Detailed findings

### ISO 9001 (quality management systems):

Following on last year's trend, ISO's popular quality management standard continues to experience a lull, claiming a mere 1 % share of the market compared to 2 % and 3 % in the previous two years. Growth has certainly plateaued since the boom times two decades ago, reflecting the current economic uncertainty in the world. Moreover, in countries with a longer-established tradition of certification, many of the largest companies are already certified and are branching out to more specific standards. The prevailing situation is expected to improve, however, as markets pick up and with the introduction of the new version of ISO 9001.

ISO 9001 uptake was slow across the board, with the following regional tendencies:

- The big surprise this year was North America, with a 4 % growth, borne largely by Mexico where several new certification bodies participated in the 2014 edition. By contrast, US growth stalled due to an important contributor reporting fewer certifications this year.
- At 1.9 %, the East Asia-Pacific region made encouraging progress. Notably, the standard performed extremely well in Australia with two major contributors reporting more certificates than in 2013. These positive statistics were slightly hampered by a big drop in Vietnam due to a large certification body reporting lower numbers of certificates and a slump in the Philippines, where a certification body was excluded from this edition of the survey after its accreditation was withdrawn.
- South America exhibited negative growth (-4.2 %), which can be largely ascribed to a significant drop in Brazil, where participation in the survey was lower and a number of certification bodies reported fewer certificates.
- Europe's progress was similarly slow this year, revealing a meagre 0.2 % increase. This can be traced back to a decline in countries such as Greece, Germany and the Netherlands due to large contributors not participating in this year's edition, while slowdown in the UK is imputable to a major certification body reporting fewer certificates. Still suffering the aftermaths of the economic crisis, the Spanish market also performed shakily this year, with many certification bodies reporting lower numbers of certificates. On the other end of the spectrum, Belarus enjoyed a substantial increase due to one of its main certification bodies being accredited for the first time this year.

### ISO 14001 (environmental management systems):

ISO 14001 picked up after last year's slight setback with a 7 % growth rate. Growth was driven by East Asia and North America, boasting 10 % and 14 % respectively. The latter was supported, in Canada, Mexico and the USA, by new certification bodies entering the survey, while existing contributors in the USA also reported significantly more certificates. Australia experienced exponential growth with a major certification body reporting more certificates than usual, while the increase recorded in the Czech Republic and Turkey mainly reflects the inclusion of previously unreported certificates. Overall, however, China enjoys the highest growth in absolute numbers with a 13 023 increase in certificates issued.

**ISO 50001** (energy management systems):

By now a confirmed asset, ISO 50001 is still performing well in its third year in the survey, with an annual progression of 40 % (6 778 certificates issued). Europe concentrates the bulk of the business, boasting a substantial 80 % share of the market. True to form, Germany holds 50 % of the world's total due to the country's legislation on energy matters. A champion of growth this year, the UK takes second place, far ahead of other countries, albeit with ten times fewer certificates than its German counterpart.

**ISO/IEC 27001** (information security management systems):

The information security standard experienced a slight downturn, with a modest 7 % growth, belying the promising results of previous years. As an innovator in digital technology, Japan historically tops the charts in the information security sector, although the UK also features prominently with the most important growth in absolute terms (340 certificates issued), resulting from a certification body reporting more certificates than in 2013.

**ISO 22000** (food safety management systems):

Its decrease being slightly down from last year, ISO's food management standard nevertheless clocks in a respectable 14 % (or 30 500 certificates issued) compared to 20 % and 15 % increases in previous years – its dented progress offset by it breaking the 30 000 certificate threshold for the first time this year. In particular, North America experienced a spectacular growth rate of 70 %, notably in the USA where a new certification body joined the survey and a major existing contributor reported more certificates than usual. On European shores, Greece – one of the countries boasting the largest number of certificates – plummeted this year due to an important certification body not participating in the survey. Conversely, Australia's remarkable progression can be linked to a significant contributor reporting more certificates than usual.

**ISO/TS 16949** (quality management systems for the automotive sector):

With a healthy 8 % progression (against 5 % in 2012 and 7 % in 2013), certification to motor industry standard ISO/TS 16949 revealed an acceleration in growth, confirming a trend that has made itself visible in the past two years. These encouraging results are proof that the automotive industry is rapidly rebounding from its recession lows. Home to many car part manufacturers, China leads the way in this area, followed, at a distance, by the USA, a sign that the US auto market is making a recovery after the 2008 crisis.

**ISO 13485** (quality management systems for medical devices):

Revealing an 8 % growth rate compared to the 12 % and 15 % of past surveys, the medical devices sector confirms the downturn that has been emerging over the past few years. While China saw remarkable growth in this area, almost doubling its certification output, in absolute terms it does not compete with the top five countries dominating the market. On trend from last year, Europe claims nearly 60 % of the total number of certificates issued due to stringent regulations that mandate certification to the standard in some countries.

**ISO 22301** (business continuity management systems):

Making a timid incursion into this year's survey, ISO 22301 for business continuity management is already showing some promise with an honourable 1 700 certificates reported. Topping the charts is India with almost 30 % of the total number of certificates, followed by the UK and Japan. In today's uncertain world, getting organizations prepared in the face of disaster is gaining pace and ISO 22301 can look forward to a vast potential user base in the future.