



EXECUTIVE SUMMARY

This Market Assessment Study reports on the regulatory environment, market channels, and competing products in Germany and the UK for light-scattering dust monitoring equipment. The German and UK markets are now developing rapidly, especially as new companies enter the market and increased emphasis is being placed on workplace safety and standards are further refined.

The standards are a mix of Pan-European standards set by the European Committee for Standardization (CEN), with recommendations and support through its contributing organizations throughout Europe, along with country specific standards that are set by various health protection agencies in each country.

There are no dominant players in the market, though several companies such as Casella and SKC have established strong positions within the workplace monitoring market. Most of the companies active in the field are small to medium-sized companies, though a few larger companies such as Thermo Electron also sell related devices.

The market seems to be at a point where new products could be well-received once approved by the BIA in Germany and HSE in the UK. This approval process could be done independently or through an a local sales & distribution partner. Given that there are few good options for real-time personal dust monitoring on the market, a new personal dust sensor would most likely be an interesting product for the market, though this will need to be confirmed by further direct inquiries with relevant potential partners, regulatory officials, and customers.

EUROPEAN REGULATIONS AND REQUIREMENTS

The European Committee for Standardization (CEN) writes standards for air sampling equipment that include the standards on precision and accuracy. Within the CEN, Technical Committee 137 (TC137) is responsible for all standards relating to workplace atmospheres. Working Group 3 of TC137 is specifically responsible for all European Standards relating to particulates. Thus, relevant standards are typically designated as originating from CEN/TC137/WG3. The Chair of WG3 is Dr. Peter Paskiewicz of the DIN Secretariat, who is also at the German BIA (Berufsgenossenschaftliches Institut für Arbeitsschutz) that is responsible for implementing particulate monitoring standards in Germany.



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