

Global Laboratory Nonhuman Primates (NHPs) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Laboratory Nonhuman Primates (NHPs) market size is expected to reach \$ 2340 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

This report studies Laboratory Nonhuman Primates (NHPs) or Laboratory Non-human Primate. Nonhuman primates (NHPs) are a group of mammals composed of simians ? monkeys and apes ? and prosimians, such as lemurs., they are the closest animal models to humans regarding genetics, physiology and behavior. Experiments on non-human primates (NHPs) have brought about important advances in biology and medicine. Primates often play a crucial role in the safety testing of new drugs and in research aimed at understanding how the brain works and how to prevent infectious diseases in humans. Currently, the typical models of Laboratory Nonhuman Primates (NHPs) include Envigo (Inotiv)'s Cynomolgus macaques, HZ-Bio's Macaca Fascicularis and Rhesus Monkey, etc. Due to regulatory restrictions, major countries and regions such as the United States, the European Union, etc. have prohibited the use of apes (e.g., chimpanzees) in experiments. Therefore, this report only studies monkeys.

In the upstream supply chain, core raw materials include feed, veterinary drugs, and laboratory supplies critical to the health and adaptability of laboratory primates. Major suppliers in this domain include MP Biomedicals, Yongli Biotech, Beijing Keaoxieli, Pizhou Dongfang, Jiangsu Medicience, and Jiangsu Xietong. These companies play an essential role in maintaining the health standards, traceability, and experimental suitability of monkey populations used in research.

Leading CROs such as JOINN Laboratories, WuXi AppTec, and Envigo (Inotiv) are key end-users in this market. These companies operate large-scale animal research platforms, adhere strictly to animal welfare regulations and ethical review processes, and play a vital role in promoting the standardization and industrialization of Laboratory Nonhuman Primates (NHPs) supply chains worldwide.

The Laboratory Nonhuman Primates (NHPs) industry maintains strong gross profit margins, generally ranging from 30% to 60%, supported by the high entry barriers, strict breeding protocols, and value-added services. Customized breeding programs and long-term strategic contracts with CROs or research institutions further enhance profitability across the value chain.

In 2025, global Laboratory Nonhuman Primates (NHPs) production reached approximately 99.89 k units, with an average global market price of around US\$ 13 k per unit.

Vanny Bio Research, HZ-Bio, Envigo (Inotiv), WuXi AppTec, and JOINN Laboratories are among the major players in the Laboratory Nonhuman Primates (NHPs) market.

The top 10 global players collectively account for approximately 34% of the total market share. These companies play a critical role in supporting the global biopharmaceutical industry by providing high-quality Laboratory Nonhuman Primates (NHPs) essential for scientific research and drug development.

Among product types, *Cynomolgus* macaques are the dominant species in the market, accounting for approximately 79% of the global Laboratory Nonhuman Primates (NHPs) usage in 2025. Their broad applicability in toxicology, immunotherapy, and vaccine development, coupled with higher reproductive efficiency and environmental adaptability, makes them the preferred model over Rhesus monkeys and other species. Rhesus monkeys retain strong demand in neurophysiological research due to their cognitive relevance, while other primates are used in niche areas and represent a small portion of the overall market.

On the application side, Contract Research and Development Service Organizations (CROs) are the largest user group of Laboratory Nonhuman Primates (NHPs), contributing around 52% of global demand in 2025. CROs support pharmaceutical and biotech clients in preclinical testing, drug screening, and safety assessments, relying heavily on reliable and genetically appropriate animal models. Academic institutions and research centers represent additional key users, conducting fundamental studies and education-based animal research. A smaller proportion of usage is seen in government or public health-related vaccine development programs.

Market growth is driven by rising demand for high-fidelity animal models in cutting-edge drug development areas such as oncology, neurodegeneration, and infectious diseases. The increasing investment in life sciences, coupled with the rapid expansion of CRO capabilities and international collaboration, supports sustained market expansion. However, the industry faces several restraints, including intensifying scrutiny on animal ethics, volatility in global transport and quarantine policies, high operational costs, and the growing sophistication of alternative testing technologies such as organoids and AI-driven screening models, all of which pose potential limitations to long-term market scalability.

This report studies the global Laboratory Nonhuman Primates (NHPs) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Laboratory Nonhuman Primates (NHPs) 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 Laboratory Nonhuman Primates (NHPs) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Laboratory Nonhuman Primates (NHPs) total production and demand, 2021-2032, (Units)

Global Laboratory Nonhuman Primates (NHPs) total production value, 2021-2032, (USD Million)

Global Laboratory Nonhuman Primates (NHPs) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Laboratory Nonhuman Primates (NHPs) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Laboratory Nonhuman Primates (NHPs) domestic production, consumption, key domestic manufacturers and share

Global Laboratory Nonhuman Primates (NHPs) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Laboratory Nonhuman Primates (NHPs) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Laboratory Nonhuman Primates (NHPs) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Laboratory Nonhuman Primates (NHPs) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Vanny Bio Research, HZ-Bio, Envigo (Inotiv), JOINN LABORATORIES, WuXi AppTec, Jingang Biotech, Charles River, Pharmaron, Xishan Zhongke, ONPRC (Oregon National Primate Research Center), 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 Laboratory Nonhuman Primates (NHPs) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, 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 Laboratory Nonhuman Primates (NHPs) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Laboratory Nonhuman Primates (NHPs) Market, Segmentation by Type:

Macaca Fascicularis (Cynomolgus Macaque)

Rhesus Monkey (Macaca Mulatta)

Others

Global Laboratory Nonhuman Primates (NHPs) Market, Segmentation by Age Stage:

Juvenile

Adult

Aged

Global Laboratory Nonhuman Primates (NHPs) Market, Segmentation by Sex:

Male Monkeys

Female Monkeys

Global Laboratory Nonhuman Primates (NHPs) Market, Segmentation by Application:

Contract Research and Development Service Organization (CRO) Company

Scientific Research Institution

Colleges and Universities

Other

Companies Profiled:

Vanny Bio Research

HZ-Bio

Envigo (Inotiv)

JOINN LABORATORIES

WuXi AppTec

Jingang Biotech

Charles River

Pharmaron

Xishan Zhongke

ONPRC (Oregon National Primate Research Center)

CNPRC (California National Primate Research Center)

Sichuan Hengshu Bio-Technolog

Topgene Biotechnology

Primate Products, Inc. (PPI)

Sichuan Green-House Biotech

Bioculture Group

Key Questions Answered:

1. How big is the global Laboratory Nonhuman Primates (NHPs) market?
2. What is the demand of the global Laboratory Nonhuman Primates (NHPs) market?
3. What is the year over year growth of the global Laboratory Nonhuman Primates (NHPs) market?
4. What is the production and production value of the global Laboratory Nonhuman Primates (NHPs) market?
5. Who are the key producers in the global Laboratory Nonhuman Primates (NHPs) market?
6. What are the growth factors driving the market demand?

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