

Global Viral Detection Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Viral Detection market size is expected to reach \$ 2484 million by 2032, rising at a market growth of 14.9% CAGR during the forecast period (2026-2032).

Viral Detection refers to viral safety testing services performed for biologics, vaccines, recombinant proteins, monoclonal antibodies, cell therapies, gene therapies, as well as their raw materials, cell banks, virus seed stocks, unprocessed bulk harvests, and final product lots. It is not a single physical device; rather, it is an integrated quality-control service package composed of testing strategies, standard operating procedures, sample receipt and preparation workflows, indicator cell lines, nucleic-acid amplification systems, sequencing platforms, electron microscopy platforms, reference controls, data-analysis pipelines, and compliant reporting. Its major categories include cell-based in vitro assays, molecular methods such as PCR, qPCR, and ddPCR, broad-range NGS screening, TEM-based morphological identification, and dedicated assays for replication-competent AAV, replication-competent lentivirus, retroviruses, and related viral risks. The technical principle is to identify known or unknown viral contaminants in different sample matrices through viral growth effects, characteristic nucleic-acid sequences, particle morphology, host-range response, and orthogonal confirmation, then determine whether exogenous viral introduction or amplification risks exist in the manufacturing process. This service is mainly provided by CROs, contract testing laboratories, CDMOs with in-house quality platforms, and specialized biologics safety testing organizations. Its key technical requirements focus on sensitivity, specificity, coverage breadth, sample compatibility, contamination control, regulatory compliance, and robust GMP/GLP system execution. Typical use scenarios include cell bank release, raw material release, in-process control, unprocessed bulk testing, final lot release, and contamination investigation.

The expansion of the Viral Detection market is primarily driven by the continued growth of biologics, cell therapies, gene therapies, and novel vaccines. As product complexity rises, a single analytical method is no longer sufficient to cover all viral-risk scenarios, which is accelerating the combined use of cell-based assays, molecular methods, NGS, and electron microscopy. At the same time, updated regulatory frameworks such as ICH Q5A(R2) are bringing risk-based strategies, sample-tiering logic, animal-free alternatives, and faster release concepts to the forefront, pushing Viral Detection from a ?pre-submission compliance task? toward a continuous quality system spanning cell banking, raw materials, process control, lot release, and deviation investigation. For downstream users, building an internal high-grade viral safety platform requires heavy capital, long validation timelines, and difficult maintenance; therefore, outsourcing to specialized organizations with GMP/GLP systems, established methods, and regulatory communication experience has become a practical route to improve efficiency, shorten timelines, and reduce compliance risk.

The main market challenge is no longer whether testing is required, but how to balance accuracy, coverage, speed, cost, and regulatory acceptance. Traditional in vitro and in vivo assays provide broad coverage, but their timelines are longer and sample compatibility can be limited. PCR-based methods are fast and sensitive, but they do not fully address unknown viral threats. NGS is growing rapidly, yet it places higher demands on data interpretation, background-noise control, contamination tracing, method validation, and cross-batch consistency. In cell and gene therapy, complex sample matrices, vector-related signals, and specialized replication-competent virus risks further increase the difficulty of method development and orthogonal confirmation. The industry also faces practical constraints such as cross-region regulatory differences, scheduling bottlenecks, limited expert capacity, and high biosafety requirements. Future competition will therefore center not only on the number of tests offered, but also on platform strength, regulatory alignment, turnaround time, and investigation capability.

Downstream demand is shifting from isolated testing items toward lifecycle-wide testing portfolios. Historically, demand was concentrated on foundational release testing for cell banks and raw materials. Now, more programs are moving Viral Detection upstream into vector construction, donor-material screening, process monitoring, and contamination root-cause tracing, while also extending it downstream into commercial-stage ongoing quality surveillance. Monoclonal antibodies, recombinant proteins, and vaccines remain the most stable demand base, whereas cell therapies, viral vectors, RNA therapeutics, and complex bioprocesses represent the most elastic sources of incremental demand. Supplier selection is also evolving: customers are looking beyond

price and increasingly prioritizing integrated capabilities that combine risk assessment, method development, GMP testing, deviation investigation, and global filing support. This will continue to push the market toward platformization, globalization, and higher-value services.

This report studies the global Viral Detection demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Viral Detection, 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 Viral Detection that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Viral Detection total market, 2021-2032, (USD Million)

Global Viral Detection total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Viral Detection total market, key domestic companies, and share, (USD Million)

Global Viral Detection revenue by player, revenue and market share 2021-2026, (USD Million)

Global Viral Detection total market by Type, CAGR, 2021-2032, (USD Million)

Global Viral Detection total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Viral Detection 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 Merck KGaA, Charles River Laboratories, Eurofins, SGS, Sartorius, Asahi Kasei, Samsung Biologics, Syngene, Intertek, Minaris Advanced Therapies, 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 Viral Detection 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 Viral Detection Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Viral Detection Market, Segmentation by Type:

Plaque Assays

PCR

ELISA

Others

Global Viral Detection Market, Segmentation by Service Delivery Format:

Standard Testing Services

Customized Method Development Services

Validation Services

Batch Release Testing Services

Investigation Services

Others

Global Viral Detection Market, Segmentation by Sample Matrix:

Raw Materials

Cell Banks

Viral Seed Stocks / Viral Vectors

In-Process Samples

Bulk Harvest / Drug Substance

Final Product

Others

Global Viral Detection Market, Segmentation by Compliance Level:

Research Use Only

Non-GLP / Non-GMP Testing

GLP-compliant Testing

GMP-compliant Testing

Regulatory Submission Support Testing

Others

Global Viral Detection Market, Segmentation by Application:

Blood & Blood Products

Cellular & Gene Therapy Products

Stem Cell Products

Tissue & Tissue Products

Vaccines and Therapeutics

Companies Profiled:

Merck KGaA

Charles River Laboratories

Eurofins

SGS

Sartorius

Asahi Kasei

Samsung Biologics

Syngene

Intertek

Minaris Advanced Therapies

Texcell

PathoQuest

Clean Cells

Avance Biosciences

Microbiologics

Alcami

Creative Biolabs

Creative Biogene

WuXi AppTec

WuXi Biologics

Key Questions Answered

1. How big is the global Viral Detection market?
2. What is the demand of the global Viral Detection market?
3. What is the year over year growth of the global Viral Detection market?
4. What is the total value of the global Viral Detection market?
5. Who are the Major Players in the global Viral Detection market?
6. What are the growth factors driving the market demand?

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