

# **Toxicology Services Global Market - Forecast To 2028**

https://marketpublishers.com/r/T88B046ED44EN.html

Date: November 2021

Pages: 411

Price: US\$ 4,950.00 (Single User License)

ID: T88B046ED44EN

## **Abstracts**

Toxicology is the study of adverse effects that occur in living organisms and its environment due to chemicals, physical or biological substances at ambient exposure levels. Toxicology testing regulations are already in place for most of the developed countries across industries such as chemicals, pesticides, consumer goods, medical products, and food additives. These toxicology tests are important for the approval of products and with the increased trend for outsourcing, toxicology studies are also being outsourced across the industries.

According to IQ4I analysis, the toxicology services global market is expected to grow at a mid single digit CAGR from 2021 to 2028 to reach \$17,043.0 million by 2028. The factors such as mandatory toxicology testing requirement for various industries like pharma, medical device, cosmetic, chemical and food for their product approvals or registration, increased trend of outsourcing, increase in pharma R&D expenditure are driving the toxicology services market. Whereas, the emergence of advanced technology likes 3D-model, ex-vivo, organ-on-a chip and in-silico tool, increasing in utilization of nano-materials and regulatory changes to enhance safety profiles of agents will provide immense growth opportunities for toxicology services market in future. However, increasing focus towards drug repurposing, lack of skilled personnel, high cost and long duration of the tests and stringent government regulations towards the animal studies are expected to hamper the market growth.

The market for toxicology services is segmented based on study methods, industry, end-points and geography. Based on the study methodologies, the market is segmented into In Vivo, In Vitro and In-Silico. Among the study methodologies, in-vitro toxicity services accounted for the highest revenue in 2021 and are expected grow at a mid single digit CAGR from 2021 to 2028. The In-vitro toxicology services market is further segmented in to Cellular & Biochemical assays, Ex Vivo and 3D-model and Organ-on-a-chips. Among these, Cellular & Biochemical assay segment is accounted for the largest



revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. 3D-model and Organ-on-a-chips is expected to grow at a high single digit CAGR from 2021 to 2028 to due to increasing adoption of 3D model and organ on a chip based assays in toxicology studies.

Based on the industry, toxicology services market is classified into Pharmaceutical, medical device, chemical, cosmetics and others. Among the industries, Pharmaceutical segment is accounted for the highest revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Medical devices are expected to grow at a high single digit CAGR from 2021 to 2028. Pharmaceutical segment is further subsegmented into drug discovery and developmental toxicology. Among these, drug developmental toxicology is accounted for the highest revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Drug discovery toxicology is expected to grow at mid single digit CAGR from 2021 to 2028. The chemical segment is further segmented into industrial chemical and agrochemicals. Among these, industrial chemical is accounted for the highest revenue of in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. AgroChemical segment is expected to grow at a high single digit CAGR from 2021 to 2028. Other industries segment is further segmented into food, consumer goods, environment and others. Among these, environment segment is accounted for the highest revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028.

According to IQ4I analysis, the end-points market are categorized into acute toxicity, chronic toxicity, dermal toxicology, ocular toxicology, safety pharmacology, reproductive and developmental toxicology, genotoxicity, carcinogenicity, neurotoxicity, ecotoxicology and others. Among these, acute toxicology segment is accounted for the highest revenue of in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Developmental & Reproductive toxicology is expected to grow at high single digit CAGR from 2021 to 2028

By geography, the toxicology services global market is segmented into North America (U.S. and Rest of North America), Europe (Germany, France, U.K. and Rest of Europe), Asia-Pacific (Japan, China, India, and Rest of APAC) and the Rest of the world (Brazil, Rest of Latin America and the Middle East & Africa). North America accounted for the largest revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. The factors such as increasing R&D expenditure, mandatory toxicology studies required for new drug, chemical, food additive, agrochemical and chemical to enter into the market, increase in development of new drugs, increase in development of novel medical devices and increasing adoption of advanced technologies and novel in-vitro



and in-silico models to expand the services capabilities by the toxicity service providers are driving the toxicology services market in the region.

Asia-Pacific is expected to grow at a high single digit CAGR from 2021 to 2028 due to growing pharma and biopharma industries with development of innovative drugs into the market, mandatory regulatory toxicology studies needed for approval of new drugs, medical device, agrochemical into the market, increasing number of agrichemical registrations, increasing government investment towards the pharma and biopharam industries. Further, changing regulations to ensure further safety profiles of pesticides will boost the demand for toxicology services in the region future.

The toxicology services global market is competitive and all the players in this market are involved in adopting advanced technologies in toxicology studies to expand their service offerings and maintain their market shares.

The key players in the Toxicology services global market include Charles River Laboratories International (U.S.), CMIC Holdings Co., Ltd (Japan), Evotec SE (Germany), Eurofins Scientific S.E. (Luxemburg), Inotiv, Inc. (U.S.), North American Science Associates, LLC (U.S.), Laboratory Corporation of America Holdings (U.S.), ITR Laboratories Canada Inc. (Canada), Pharmaron Beijing Co. Ltd. (China), SGS SA (Switzerland) and Wuxi Apptec (China).

The report provides an in-depth market analysis of the above-mentioned segments across the following regions:

| North America<br>U.S. |  |
|-----------------------|--|
| Rest of North America |  |
| Europe<br>Germany     |  |
| U.K.                  |  |
| France                |  |
| Rest of Europe        |  |



Asia-Pacific China

Japan

India

Rest of APAC

Rest of the World (RoW)
Brazil

Rest of Latin America

Middle East and Others



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FIGURE 23 OTHER INDUSTRY GLOBAL MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

FIGURE 24 OTHER INDUSTRY GLOBAL MARKET SHARE, BY REGION, (2021 V/S 2028) (%)

FIGURE 25 OTHER INDUSTRY GLOBAL MARKET SHARE, BY REGION, (2021 V/S 2028) (%)

FIGURE 26 TOXICOLOGY SERVICES GLOBAL MARKET SHARE, BY ENDPOINTS (2021 V/S 2028) (%)

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FIGURE 28 TOXICOLOGY SERVICES GLOBAL MARKET REVENUE, BY GEOGRAPHY (2021) (\$ MN)

FIGURE 29 NORTH AMERICA TOXICOLOGY SERVICES MARKET SHARE, BY METHODS (2021 V/S 2028) (%)

FIGURE 30 IN VITRO TOXICOLOGY SERVICES MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

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FIGURE 36 NORTH AMERICA TOXICOLOGY SERVICES MARKET SHARE, BY COUNTRY (2021 V/S 2028) (%)

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FIGURE 40 REST OF NORTH AMERICA TOXICOLOGY SERVICES MARKET REVENUE (\$MN) AND CAGR (%), BY ENDPOINTS (2021)

FIGURE 41 EUROPE TOXICOLOGY SERVICES MARKET SHARE, BY METHODS



(2021 V/S 2028) (%)

FIGURE 42 EUROPE IN VITRO TOXICOLOGY SERVICES MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

FIGURE 43 EUROPE TOXICOLOGY SERVICES MARKET SHARE, BY INDUSTRY (2021 V/S 2028) (%)

FIGURE 44 EUROPE PHARMACEUTICAL INDUSTRY MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

FIGURE 45 EUROPE CHEMICAL INDUSTRY MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

FIGURE 46 EUROPE OTHER INDUSTRIES MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

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FIGURE 61 APAC CHEMICAL INDUSTRY MARKET SHARE, BY TYPE (2021 V/S 2028) (%)

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REVENUE, BY ENDPOINTS (\$MN) AND CAGR (%) (2021)

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REVENUE, BY METHODS AND INDUSTRY (2021 V/S 2028) (\$MN)

FIGURE 86 MIDDLE EAST & OTHERS TOXICOLOGY SERVICES MARKET

REVENUE (\$ MN) AND CAGR (%), BY END POINTS (2021)

FIGURE 87 SWOT: CHARLES RIVER LABORATORIES

FIGURE 88 SWOT: CMIC HOLDINGS CO., LTD

FIGURE 89 SWOT: EVOTEC SE

FIGURE 90 SWOT: EUROFINS SCIENTIFIC S.E.

FIGURE 91 SWOT: INOTIV INC.

FIGURE 92 SWOT: ITR LABORATORIES CANADA INC.

FIGURE 93 SWOT: LABCORP CORPORATION OF AMERICA HOLDINGS

FIGURE 94 SWOT: NORTH AMERICAN SCIENCE ASSOCIATES, LLC

FIGURE 95 SWOT: PHARMARON BEIJING CO., LIMITED

FIGURE 96 SWOT: SGS SA

FIGURE 97 SWOT: WUXI APPTEC



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