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Global Dicyandiamide Testing Services Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Dicyandiamide Testing Services market size is predicted to grow from US$ 42.26 million in 2025 to US$ 66.49 million in 2032; it is expected to grow at a CAGR of 6.6% from 2026 to 2032.

Dicyandiamide Testing Services refer to professional analytical laboratory services for the qualitative identification, quantitative determination, residue monitoring, impurity assessment and content analysis of dicyandiamide (DCD) in food and dairy products, fertilizers, soil conditioners, nutritional supplements, animal feed, environmental samples and selected chemical materials. The service generally covers sample preparation and extraction, chromatographic or mass-spectrometric analysis, quality control, data interpretation and analytical reporting. LC-MS/MS is primarily used for trace-level residue and impurity testing where high sensitivity and selectivity are required, particularly in food, dairy and nutritional products, while HPLC and LC-UV methods are widely applied to DCD content determination in fertilizers and related agricultural inputs. Testing requirements vary according to sample type, analytical objective and required quantitation limit. Commercial demand is primarily generated by food safety and quality assurance, fertilizer quality control, nutritional product impurity verification, regulatory compliance and contract analytical research.

Key Findings

LC-MS/MS is the principal analytical route for trace-level DCD testing in food, dairy and nutritional products

HPLC remains an established method for DCD content determination in fertilizers and related agricultural inputs

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Food and dairy, fertilizer and agrochemical, and nutraceutical applications constitute the principal demand base

Standardized fertilizer analysis is supporting broader routine DCD testing and improved comparability of laboratory results

Competition combines global laboratory networks with regional providers specializing in food, dairy, fertilizer and nutritional analysis

Market Trends

Dicyandiamide Testing Services are evolving from an event-driven contaminant testing niche toward a more diversified routine analytical service. Food and dairy testing increasingly emphasizes lower quantitation limits, matrix-specific sample preparation and multi-contaminant analysis, while fertilizer testing is becoming more standardized as DCD is increasingly evaluated together with other fertilizer efficiency enhancers. The establishment of standardized analytical methods for DCD and NBPT in fertilizers and soil conditioners is improving consistency across laboratories and supporting routine quality-control applications. At the same time, increasing attention to purity and process-related impurities in creatine and other sports-nutrition products is creating additional demand beyond traditional dairy residue testing. The long-term development direction is toward multi-analyte testing, lower reporting limits, standardized laboratory workflows, shorter turnaround times and more integrated digital management of samples, quality-control data and analytical reports.

Market Dynamics

Drivers

Growth in Dicyandiamide Testing Services is primarily supported by tighter quality-control requirements across food supply chains, increasing use of independent laboratory verification, more standardized fertilizer quality testing and stronger quality-management requirements in nutritional products. Food and dairy manufacturers use DCD analysis to support contaminant monitoring, supplier qualification and product-release control. In the fertilizer industry, standardized analytical procedures improve the comparability of results and facilitate routine third-party testing of DCD-containing formulations. Expanding demand for creatine and other sports-nutrition products is also increasing attention to raw-material purity and process-related impurities, creating

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additional demand for independent DCD analytical services.

Restraints

The market is constrained by the relatively narrow scope of DCD as an individual analyte. Many customers purchase DCD analysis as part of broader contaminant, impurity or fertilizer-component testing packages rather than as a standalone service, which limits the testing frequency and pricing power of individual DCD tests. Analytical requirements also vary significantly between dairy products, fertilizers, nutritional supplements and environmental samples, increasing the complexity of sample preparation, method management and validation. In addition, large food, fertilizer and chemical companies may perform part of their routine quality control internally, reducing addressable demand for external laboratories. Price competition is particularly evident in standardized applications where multiple laboratories already operate compatible HPLC or LC-MS/MS platforms.

Opportunities

The most attractive incremental opportunities are expected to arise from fertilizer testing standardization, sports-nutrition quality assurance and high-sensitivity multi-analyte analysis. Broader adoption of standardized methods for DCD and related fertilizer efficiency enhancers supports routine testing for formulation verification, product release, trade quality control and third-party quality assessment. Nutraceutical and sports-nutrition companies also represent a developing opportunity as manufacturers and brands place greater emphasis on purity, traceability and independent verification of creatine and other functional ingredients. Laboratories can further increase service value by combining DCD with related contaminants or process impurities, meeting differentiated quantitation-limit requirements, providing method development and validation, conducting continuous batch monitoring and supporting broader supply-chain quality programs.

Challenges

A major industry challenge is maintaining analytical consistency across different sample types and testing methods. Quantitation limits, reporting limits and detection limits are technically distinct, while extraction recovery and matrix interference can materially affect analytical performance. Laboratories therefore require validated methods, suitable reference materials, rigorous quality-control systems and experienced technical personnel. Another challenge is that DCD analysis is frequently embedded within broader multi-contaminant or multi-impurity testing packages, making revenue

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attribution between standalone DCD testing and integrated analytical services relatively complex. Regional differences in standards and customer specifications also require international laboratory networks to balance method harmonization with local regulatory and application requirements.

Value Chain Analysis

The upstream value chain of Dicyandiamide Testing Services includes LC-MS/MS systems, HPLC systems, chromatographic columns, certified reference materials, analytical reagents and solvents, sample-preparation consumables, laboratory information-management systems, and instrument calibration and maintenance services. High-sensitivity trace analysis relies heavily on advanced mass-spectrometry platforms, reference-material quality and robust sample-preparation procedures, while fertilizer content determination can generally be performed using mature HPLC platforms. Instrument performance, reference-material quality, extraction efficiency and laboratory quality systems collectively determine analytical sensitivity, reproducibility and turnaround time.

The midstream segment consists of global testing groups, independent third-party laboratories and specialized analytical centers that undertake sample preparation, method selection, instrumental analysis, quality assurance, interpretation and reporting. Value creation is increasingly shifting from standardized single-analyte testing toward laboratory accreditation, reliable low-level quantitation, matrix-specific analytical expertise, turnaround management and integrated multi-analyte testing capabilities. Downstream customers mainly include food and dairy manufacturers, fertilizer and agrochemical companies, nutraceutical and sports-nutrition companies, feed producers, chemical companies, importers, exporters and research organizations. Complex matrices, lower reporting limits, customized methods, impurity profiling and continuous batch-monitoring programs generally generate higher service value than routine standardized testing.

Segment Insights

By analytical method, LC-MS/MS and HPLC represent the two principal technology routes. LC-MS/MS has a stronger position in trace-level residue and impurity analysis because of its sensitivity and selectivity, particularly in food, dairy and nutritional products. HPLC remains important for DCD content determination in fertilizers and related agricultural inputs, where standardized analytical procedures support routine quality-control applications. Differences in analytical sensitivity, sample preparation,

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method validation and reporting requirements result in clear differentiation in service positioning and pricing across laboratories.

By testing objective, residue and contaminant testing is concentrated primarily in food and dairy applications, content determination is more important in fertilizers and agricultural inputs, and purity and impurity testing is increasingly relevant to nutritional supplements and selected chemical materials. R&D and method-validation services account for a smaller but higher-value portion of demand where customers require non-standard matrices, lower quantitation limits or customized analytical procedures. By quantitation limit, laboratories capable of reliable low-level measurement generally serve more demanding food, nutritional and quality-control applications, while higher-concentration fertilizer samples can typically be addressed through established HPLC methods. As a result, the revenue structure of the market is more diversified than its test-volume structure.

Downstream Market Opportunities

Food and dairy remain an important foundation of demand for Dicyandiamide Testing Services, supported by food-safety management, import-export quality control and supplier quality assessment. Fertilizer and agrochemical applications offer more recurring testing opportunities as DCD is used as a nitrification inhibitor and can be analyzed together with other fertilizer efficiency enhancers under standardized methods. Nutraceuticals and sports nutrition represent an emerging higher-value application, particularly in creatine products where DCD can be monitored as part of broader purity and process-impurity control programs. Feed, chemical and pharmaceutical customers provide additional niche demand, particularly for non-standard matrices, method validation and low-level impurity analysis.

Regional Insights

Europe is characterized by a relatively high concentration of global testing groups and mature analytical laboratory infrastructure. Asia-Pacific combines substantial food-processing, dairy, fertilizer and nutritional-product demand with an expanding regional laboratory base. China is becoming increasingly important in fertilizer-related DCD testing as domestic analytical standards become more established, supporting more standardized quality-control and third-party testing activities. Japan retains specialized capabilities in fertilizer and soil analysis, while New Zealand has developed strong dairy analytical capabilities supported by its export-oriented dairy industry. Southeast Asia is also benefiting from expanding food and feed manufacturing and broader adoption of

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accredited laboratory services.

North America represents an established market for food, nutritional supplement and contract analytical testing, with additional opportunities emerging from nutritional-product quality verification and multi-analyte laboratory services. Latin America, the Middle East and Africa currently represent smaller and more fragmented demand pools, where international laboratory networks play an important role in serving multinational food, agricultural and ingredient companies. Regional competitive strength therefore depends less on dedicated DCD laboratory capacity than on accredited laboratory coverage, proximity to end-use customers, existing chromatography and mass-spectrometry infrastructure, and the ability to transfer validated methods efficiently across laboratory networks.

Competitive Landscape Analysis

The global Dicyandiamide Testing Services market is fragmented, with competition between large international testing groups and regional or application-focused analytical laboratories. Eurofins Scientific, SGS, Intertek, M?rieux NutriSciences and ALS benefit from international laboratory networks, broad analytical portfolios, established accreditation systems and relationships with multinational food and industrial customers. Regional and specialized providers compete through stronger expertise in particular applications, including dairy quality assurance, fertilizer and soil analysis, and nutritional-product impurity testing. Competitive differentiation is increasingly shifting from the basic ability to detect DCD toward quantitation limits, sample coverage, turnaround time, method validation, multi-analyte testing capabilities and consistency across laboratory networks. Consolidation in the broader food-testing industry is also reshaping regional service coverage, while specialized laboratories continue to retain competitive positions in technically demanding or locally concentrated applications. Over the longer term, providers combining analytical sensitivity, comprehensive accreditation systems, application-specific method-development expertise, cross-regional method transfer and continuous quality-management services are expected to maintain stronger competitive positions.

Report Scope

LPI (LP Information)' newest research report, the “Dicyandiamide Testing Services Industry Forecast” looks at past sales and reviews total world Dicyandiamide Testing Services sales in 2025, providing a comprehensive analysis by region and market sector of projected Dicyandiamide Testing Services sales for 2026 through 2032. With

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Dicyandiamide Testing Services sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Dicyandiamide Testing Services industry.

This Insight Report provides a comprehensive analysis of the global Dicyandiamide Testing Services landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Dicyandiamide Testing Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Dicyandiamide Testing Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dicyandiamide Testing Services and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Dicyandiamide Testing Services.

This report presents a comprehensive overview, market shares, and growth opportunities of Dicyandiamide Testing Services market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

LC-MS/MS

HPLC / LC-UV

Other

Segmentation by Quantitation Limit:

?0.01 mg/kg

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>0.01–0.1 mg/kg

>0.1–1.0 mg/kg

>1.0 mg/kg

Segmentation by Testing Objective:

Residue & Contaminant Testing

Content Determination

Purity & Impurity Testing

Other

Segmentation by Application:

Food & Dairy

Nutraceuticals & Sports Nutrition

Fertilizer & Agrochemical

Feed & Animal Nutrition

Chemical & Pharmaceutical

Other

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Eurofins Scientific

SGS

Intertek

M?rieux NutriSciences

ALS

AsureQuality

Cawthron Institute

Alfa Chemistry

Synergy Analytical Laboratory

Shimadzu Techno-Research

Shanghai Institute of Chemical Industry Testing

China Testing & Certification International Group

Henan Xinlianxin Fertilizer Testing

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