

Mycotoxin Testing Market by Type (Aflatoxins, Ochratoxin, Fumonisin, Zearalenone, deoxynivalenol, Trichothecenes, Patulin), Technology (Chromatography- & Spectroscopy-Based, Immunoassay-Based), Sample (Feed & Food), and Region - Global Forecast to 2025

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Abstracts

“Implementation of stringent government regulations regarding mycotoxin testing and awareness among the consumer for certification are projected to drive the mycotoxin testing market”

The global mycotoxin testing market size estimated at USD 946 million in 2020 and is projected to reach USD 1,337 million by 2025, at a CAGR of 7.1%. The market is driven by factors such as growing recalls and border rejections with the growth in international food trade, stringent regulations across various countries, and changing climatic conditions. High costs associated with the installation of technologies inhibit the growth of the mycotoxin testing market.

COVID-19 has led to a drastic shift in consumer demand away from restaurants, food service and other types of “food away from home” towards food consumed at home, requiring important changes in the way food supply chains operate. As the COVID-19 pandemic gathered pace, sales of “food away from home” (consumed in hotels, restaurants, catering and caf?s) collapsed.

COVID-19 has led to disruptions in food processing industries, which have been affected by rules on social distancing, by labour shortages due to movement restrictions, and by lockdown measures to contain the spread of the virus. and the other

measures taken by the regional governments, thereby limiting the number of people who can work together in small areas. Thus, the decline in 2020 in the mycotoxin testing market growth is mainly due to the impact of COVID-19 pandemic. However, as these restrictions relax, and as certification requirements on products gain more attention via consumers, the market for mycotoxin testing would witness a significant growth in the next five years.

The segmentation of the mycotoxin testing market is based on type, sample, technology, and region. Based on type, the mycotoxin testing market is segmented into aflatoxin, ochratoxins, fumonisins, zearalenone, deoxynivalenol, trichothecene, patulin, and others. The market is further segmented, based on sample such as, Food (cereals, grains, and pulses, milk and milk products, meat, poultry, and seafood, nuts, seeds, and spices, fruits and vegetables and others), and feed (cereals and cereal by-products, seeds and seed products, forage and silage, and others). The market is further segmented, based on technology such as, Chromatography- & spectroscopy-based, Immunoassay-based *Pichia* spp., and high-performance liquid chromatography (HPLC). The mycotoxin testing market, by region, is segmented into North America, South America, Europe, Asia Pacific, and RoW.

“Cereals, grains, and pulses: The largest-growing segment of the mycotoxin testing market, by sample market”

Based on sample, the mycotoxin testing market is segmented into food and feed. Among food samples tested, cereals, grains, and pulses recorded the highest CAGR, due to a greater level of contamination with various mycotoxins. Cereals, grains, and pulses are more susceptible to the co-occurrence of mycotoxins, thereby leading to an increased demand for testing, as they are used in various products for food processing.

“By type, the aflatoxin segment is projected to witness the highest growth during the forecast period.”

The aflatoxin segment is estimated to grow at the highest CAGR due to the growing prevalence of fungi—*Aspergillus flavus* and *Aspergillus parasiticus*. There are four major types of aflatoxins, namely, B1, B2, G1, and G2. Of these aflatoxins, aflatoxin B1 is a majorly produced toxin, and therefore it is regulated in the US at 20 ppb in agricultural products, which are used for human consumption. Crops such as maize, peanuts, groundnuts, cotton seeds, and tree nuts are prone to aflatoxin contamination. Exposure to aflatoxins for a prolonged period of time causes birth defects among infants, chronic diarrhea, and immunosuppression. Aflatoxins are potent carcinogens and could lead to

cases of liver cancer. These factors have led to a growth in the mycotoxin testing market.

“Asia Pacific: The largest-growing segment of the mycotoxin testing market, by mycotoxin testing region”

Food security standards are increasingly becoming stringent in the Asia Pacific region to ensure a safer supply of food and feed to individuals and livestock inside and outside the region. Governments have introduced various regulations for consumers, producers, and regulators. Japanese companies have been determined to match up to their national standards to international levels to gain a leading market position for food products in the global market. The lack of awareness among companies about food and feed safety standards has hindered the public health, for which the complete knowledge management system has to be specified.

Since the region is among the major growers and exporters of fruits & vegetables, it witnesses increasing concerns about the food safety of agricultural food products. The mycotoxin testing will experience significant growth in the mycotoxin testing market. The pandemic situation caused due to the outbreak of COVID-19 will impact food safety, as the consumers are becoming more aware regarding health issues and the safety of food products. These factors are projected to drive the growth of the mycotoxin testing market.

Breakdown of primaries

The study contains insights from various industry experts, ranging from equipment and testing kits providers to Tier 1 companies and food & feed processors and manufacturers. The break-up of the primaries is as follows:

By Company Type-Tier 1 45-%, Tier 2- 30%, Tier 3- 25%

By Designation- C level- 50%, Managers- 20%, Executives- 30%

By Region- APAC- 40%, Europe- 30%, North America- 20%, and RoW*- 10%

*RoW includes Middle east and Africa

The market for mycotoxin testing globally is consolidated, with established players occupying a major share in the industry. Major testing service providers for mycotoxin

such as SGS (Switzerland), Bureau Veritas (France), Eurofins (Luxembourg), Intertek (UK), Mérieux NutriSciences (US), ALS Limited (Australia), Neogen (US), Romer Labs (US), Symbio Laboratories (Australia), OMIC USA (US), AsureQuality (New Zealand), and Microbac Laboratories (US). Service providers are adopting strategies such as new service launches, expansion & investments, mergers & acquisitions, agreements, collaborations, joint ventures, and partnerships to strengthen their position in the market.

Research Coverage

This report segments the mycotoxin testing market by type (aflatoxin, ochratoxins, fumonisins, zearalenone, deoxynivalenol, trichothecene, patulin, and others), sample (cereals, grains, and pulses, milk and milk products, meat, poultry, and seafood, nuts, seeds, and spices, seeds and seed products, forage and silage, fruits and vegetables, and others), technology (chromatography- & spectroscopy-based, immunoassay-based (high performance liquid chromatography (HPLC), and others)), and region (North America, Europe, Asia Pacific, South America, and ROW). In terms of insights, this research report focuses on various levels of analysis—competitive landscape, end-use analysis, and company profiles—which together comprise and discuss the basic views on the emerging & high-growth segments of the mycotoxin testing market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Key Benefits of Buying the Report

The report will help the leaders/ new entrants in the market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the mycotoxin testing market and provides them information on key market drivers, restraints, challenges, and opportunities.

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*Details on Business Overview, Services Offered, Recent Developments, SWOT Analysis, and MNM View might not be captured in case of unlisted companies.

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