+44 20 8123 2220
info@marketpublishers.com

Mycotoxin Testing Market Report by Type (Aflatoxins, Ochratoxin, Fumonisins, Zearalenone, Deoxynivalenol, Trichothecenes, Patulin), Technology (Chromatography- & Spectroscopy- Based, Immunoassay-Based), Sample, & Region - Global Forecast to 2029

https://marketpublishers.com/r/MD507F356E3EN.html
Date: May 2024
Pages: 327
Price: US$ 3,217.50 (Single User License)
ID: MD507F356E3EN

Abstracts

The global mycotoxin testing market is estimated at USD 1.6 billion in 2024 and is projected to reach USD 2.3 billion by 2029, at a CAGR of 6.7% during the forecast period. Mycotoxins are toxic compounds produced by molds that can contaminate food and feed. Consumption of mycotoxin-contaminated products can lead to acute and chronic health issues in humans and animals, including liver damage, immune suppression, and cancer. Testing ensures that food and feed products are safe for consumption, protecting public health and animal welfare. International trade of food and feed products requires compliance with stringent food safety standards and regulations. Mycotoxin testing ensures that products meet the quality and safety requirements of importing countries, facilitating trade and maintaining market access. Non-compliance with mycotoxin regulations can lead to trade barriers and restrictions, hindering exports and economic growth.

“Stringent regulations regarding mycotoxins to drive the mycotoxin testing globally”

Regulatory agencies worldwide impose maximum limits on mycotoxin levels in food and feed products to ensure consumer safety. Compliance with these regulations is mandatory for manufacturers, importers, and exporters, necessitating comprehensive testing programs to detect and quantify mycotoxin contamination accurately. Failure to comply with regulatory standards can result in severe penalties, including product

recalls, fines, and legal action, incentivizing stakeholders to invest in robust testing protocols. Furthermore, stringent regulations increase consumer confidence in the safety and quality of food products, driving demand for certified mycotoxin-free products.

“In 2023, cereals, grains, and pulses stood as the major segment within the food segment of the mycotoxin testing market. “

Cereals, grains, and pulses are particularly susceptible to mycotoxin contamination during various stages of production, including cultivation, harvest, storage, and transportation. This widespread occurrence necessitates regular testing to identify and mitigate contamination risks. Growing consumer awareness of food safety issues has led to increased demand for safe and high-quality food products, further driving the need for mycotoxin testing in cereals, grains, and pulses to meet consumer expectations and maintain brand reputation.

“Within the type segment, aflatoxins type will grow at the highest rate.”

The aflatoxins pose significant health risks to humans and animals, including liver damage, immune suppression, and an increased risk of liver cancer. As a result, there is a heightened awareness of aflatoxin contamination and a greater emphasis on testing to ensure food and feed safety. According to data from the RASFF (Rapid Alert System for Food and Feed) database in 2020, the majority of aflatoxin contamination incidents were documented in peanuts, rice, various nuts (including pistachios, hazelnuts, and almonds), spices, and dried figs. These incidents indicated aflatoxin levels of up to 1000 ?g/kg.

Based on the Cargill Mycotoxin Survey of 2023, India is classified as a high-risk zone due to the fact that 50-74% of the analyzed samples exceeded the performance risk level for mycotoxin contamination. Aflatoxin emerges as the predominant mycotoxin, followed by Fumonisin, Zearalenone, and T2. These mycotoxins pose significant threats to the poultry industry as they have the potential to diminish performance and elevate disease incidence among poultry populations. Additionally, technological advancements in testing methodologies, such as chromatography, immunoassays, and molecular methods, have improved the efficiency, accuracy, and sensitivity of aflatoxin testing, further fueling market growth.

“The mycotoxin testing market in North America is anticipated to maintain consistent growth throughout the forecast period.”

Increasing awareness of food safety among consumers and regulatory bodies has led to the implementation of stringent regulations governing mycotoxin levels in food and feed products. Compliance with these regulations requires thorough testing, driving demand for mycotoxin testing services and technologies. Fumonisins (FUM) and deoxynivalenol (DON) are the most common mycotoxins present in North America. The US and Canada have been imposing regulations and implementing reliable technologies for mycotoxin tests.

The Break-up of Primaries:

By Company Type: Tire 1- 35%, Tire 2- 40%, Tire 3- 25%

By Designation: CXOs – 30%, Managers – 50%, Executives – 20%

By Region: North America – 25%, Europe – 25%, Asia Pacific – 30%, South America - 10%, RoW - 10%

Key players in this market include SGS Soci?t? G?n?rale de Surveillance SA (Switzerland), Bureau Veritas (France), Intertek Group plc (UK), DSM-Firmenich (Netherlands), Eurofins Scientific (Luxembourg), ALS (Australia), Neogen Corporation (US), AsureQuality (New Zealand), Symbio Labs (Australia), Microbac Laboratories, Inc. (US), INSTITUT MERIEUX (France), Premier Analytics Services (UK), Charm Sciences (US), OMIC USA INC. (US), and Bio-Check (UK) Ltd. (UK).

Research Coverage:

The report segments the mycotoxin testing market based on type, technology, sample, and region. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the mycotoxin testing market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, services, key strategies, Contracts, partnerships, and agreements. New product launches, mergers and acquisitions, and recent developments associated with the mycotoxin testing market. Competitive analysis of upcoming startups in the mycotoxin testing market ecosystem is covered in this report.

Reasons to buy this report:

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

Analysis of key drivers (implementation of stringent regulations related to mycotoxin detection, growth in consumer awareness, and climatic variations leading to increase in mycotoxin contamination) restraints (lack of food control systems, technology, infrastructure, and resources in developing countries and high capital investment). Opportunities (expansion opportunities in emerging markets for mycotoxin testing, launch of advanced technologies for detecting mycotoxins, increase in demand for cereal products and oats to offer high growth opportunities for mycotoxin testing and emerging mycotoxins) and challenges (inappropriate sample collection & standardization and masked mycotoxins remain undetected).

Product Development/Innovation: Detailed insights on research & development activities and new product launches in the mycotoxin testing market.

Market Development: Comprehensive information about lucrative markets – the report analyses the mycotoxin testing market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the mycotoxin testing market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like SGS Soci?t? G?n?rale de Surveillance SA (Switzerland), Bureau Veritas (France), Intertek Group plc (UK), DSM-Firmenich (Netherlands), Eurofins Scientific (Luxembourg), ALS (Australia), Neogen Corporation (US), AsureQuality (New Zealand), Symbio Labs (Australia), Microbac Laboratories, Inc. (US), INSTITUT MERIEUX (France), Premier Analytics Services (UK), Charm Sciences

(US), OMIC USA INC. (US), and Bio-Check (UK) Ltd. (UK) in the mycotoxin testing market.

+44 20 8123 2220
info@marketpublishers.com

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES
1.2 MARKET DEFINITION
1.2.1 INCLUSIONS & EXCLUSIONS
TABLE 1 MYCOTOXIN TESTING MARKET: INCLUSIONS & EXCLUSIONS
1.3 MARKET SCOPE
1.3.1 MARKET SEGMENTATION
FIGURE 1 MYCOTOXIN TESTING MARKET SEGMENTATION
1.3.2 REGIONS COVERED
FIGURE 2 MYCOTOXIN TESTING MARKET SEGMENTATION, BY REGION
1.4 YEARS CONSIDERED
FIGURE 3 STUDY YEAR CONSIDERED
1.5 UNIT CONSIDERED
1.5.1 CURRENCY/VALUE UNIT
TABLE 2 USD EXCHANGE RATES CONSIDERED, 2019–2023
1.6 STAKEHOLDERS
1.7 SUMMARY OF CHANGES
1.7.1 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA
FIGURE 4 MYCOTOXIN TESTING MARKET: RESEARCH DESIGN
2.1.1 SECONDARY DATA
2.1.1.1 Key data from secondary sources
2.1.2 PRIMARY DATA
2.1.2.1 Key data from primary sources
FIGURE 5 KEY DATA FROM PRIMARY SOURCES
2.1.2.2 Key industry insights
FIGURE 6 INSIGHTS FROM KEY INDUSTRY EXPERTS
2.1.2.3 Breakdown of primaries
FIGURE 7 BREAKDOWN OF PRIMARIES, BY VALUE CHAIN SIDE, DESIGNATION, AND REGION
2.2 MARKET SIZE ESTIMATION
2.2.1 BOTTOM-UP APPROACH
FIGURE 8 MYCOTOXIN TESTING MARKET: DEMAND-SIDE CALCULATION

2.2.2 TOP-DOWN APPROACH
FIGURE 9 MYCOTOXIN TESTING MARKET SIZE ESTIMATION STEPS AND RESPECTIVE SOURCES: SUPPLY SIDE
2.3 DATA TRIANGULATION
FIGURE 10 DATA TRIANGULATION METHODOLOGY
2.4 RESEARCH ASSUMPTIONS
FIGURE 11 ASSUMPTIONS
2.5 RESEARCH LIMITATIONS AND RISK ASSESSMENT
FIGURE 12 RESEARCH LIMITATIONS AND RISK ASSESSMENT
2.6 RECESSION IMPACT ON MYCOTOXIN TESTING MARKET
2.6.1 RECESSION MACRO INDICATORS
FIGURE 13 INDICATORS OF RECESSION
FIGURE 14 GLOBAL INFLATION RATE, 2011–2022
FIGURE 15 GLOBAL GDP, 2011–2022 (USD TRILLION)
FIGURE 16 RECESSION INDICATORS AND THEIR IMPACT ON MYCOTOXIN TESTING MARKET
FIGURE 17 MYCOTOXIN TESTING MARKET: EARLIER FORECAST VS. RECESSION FORECAST

3 EXECUTIVE SUMMARY

TABLE 3 MYCOTOXIN TESTING MARKET SNAPSHOT, 2024 VS. 2029
FIGURE 18 MYCOTOXIN TESTING MARKET, BY TYPE, 2024 VS. 2029 (USD MILLION)
FIGURE 19 MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024 VS. 2029 (USD MILLION)
FIGURE 20 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024 VS. 2029 (USD MILLION)
FIGURE 21 MYCOTOXIN TESTING MARKET SNAPSHOT, BY REGION

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE MARKET OPPORTUNITIES FOR MYCOTOXIN TESTING MARKET PLAYERS
FIGURE 22 CONSUMER AWARENESS ABOUT FOOD SAFETY AND QUALITY TO INCREASE DEMAND FOR PRODUCTS FREE FROM CONTAMINANTS, INCLUDING MYCOTOXINS
4.2 EUROPE: MYCOTOXIN TESTING MARKET, BY TYPE AND COUNTRY
FIGURE 23 AFLATOXINS AND GERMANY TO ACCOUNT FOR LARGEST

SEGMENTAL SHARES IN EUROPEAN MYCOTOXIN TESTING MARKET IN 2024
4.3 MYCOTOXIN TESTING MARKET: SHARE OF MAJOR REGIONAL SUBMARKETS
FIGURE 24 US TO ACCOUNT FOR LARGEST SHARE (VALUE) IN 2024
4.4 MYCOTOXIN TESTING MARKET, BY TYPE AND REGION
FIGURE 25 AFLATOXINS TO OCCUPY LARGEST MARKET SHARE ACROSS MOST REGIONS DURING FORECAST PERIOD
4.5 MYCOTOXIN TESTING MARKET, BY SAMPLE AND REGION
FIGURE 26 MYCOTOXIN TESTING IN FOOD TO DOMINATE MARKET ACROSS REGIONS DURING REVIEW PERIOD
4.6 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY AND REGION
FIGURE 27 CHROMATOGRAPHY- & SPECTROSCOPY-BASED MYCOTOXIN TESTING TO ACCOUNT FOR LARGEST MARKET SHARE DURING STUDY PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION
5.2 MACROECONOMIC INDICATORS
5.2.1 GROWTH IN INTERNATIONAL TRADE
FIGURE 28 AGRICULTURAL PRODUCTS EXPORT AND IMPORT VALUE, 2022 (USD BILLION)
5.2.2 HEALTH CONCERNS RELATED TO MYCOTOXINS
5.3 MARKET DYNAMICS
FIGURE 29 MARKET DYNAMICS: MYCOTOXIN TESTING MARKET
5.3.1 DRIVERS
5.3.1.1 Implementation of stringent regulations related to mycotoxin detection
5.3.1.2 Growth in consumer awareness
5.3.1.3 Climatic variations leading to increase in mycotoxin contamination
TABLE 4 OPTIMAL TEMPERATURE CONDITIONS FOR VARIOUS MYCOTOXINS
TABLE 5 FAVORABLE WEATHER AND STORAGE CONDITIONS FOR MYCOTOXINS
5.3.2 RESTRAINTS
5.3.2.1 Lack of food control systems, technology, infrastructure, and resources in developing countries
5.3.2.2 High capital investment
5.3.3 OPPORTUNITIES
5.3.3.1 Expansion opportunities in emerging markets for mycotoxin testing
TABLE 6 MYCOTOXIN OUTBREAKS IN EMERGING ECONOMIES (µG/KG)
5.3.3.2 Launch of advanced technologies for detecting mycotoxins
TABLE 7 RECENT EVOLUTION IN DETECTION METHODS

TABLE 8 MYCOTOXIN DETECTION LIMITS, ELISA VS. LC-MS/MS (PPM AND PPB)
5.3.3.3 Increase in demand for cereal products and oats
TABLE 9 MAXIMUM LEVELS OF MYCOTOXINS IN CEREALS AND OATS ACCORDING TO COMMISSION REGULATION (EC) NO. 1881/2006 (µG/KG)
FIGURE 30 CEREAL PRODUCTION AND TRADE, 2014–2024 (MILLION TONNES)
5.3.3.4 Emerging mycotoxins
5.3.4 CHALLENGES
5.3.4.1 Inappropriate sample collection & standardization
5.3.4.2 Masked mycotoxins remain undetected

6 INDUSTRY TRENDS

6.1 INTRODUCTION
6.2 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESS
FIGURE 31 MYCOTOXIN TESTING MARKET: TRENDS/DISRUPTING IMPACTING CUSTOMERS' BUSINESSES
6.3 VALUE CHAIN ANALYSIS
FIGURE 32 MYCOTOXIN TESTING MARKET: VALUE CHAIN ANALYSIS
6.3.1 RESEARCH AND PRODUCT DEVELOPMENT
6.3.2 RAW MATERIAL SOURCING
6.3.3 MANUFACTURING & ASSEMBLY
6.3.4 LOGISTICS AND DISTRIBUTION
6.3.5 MARKETING AND SALES
6.3.6 REGULATORY BODIES
6.3.7 END USERS
6.4 ECOSYSTEM ANALYSIS/MARKET MAP
6.4.1 DEMAND SIDE
6.4.2 SUPPLY SIDE
FIGURE 33 KEY STAKEHOLDERS IN MYCOTOXIN TESTING MARKET ECOSYSTEM
TABLE 10 MYCOTOXIN TESTING MARKET: ECOSYSTEM
6.5 TECHNOLOGY ANALYSIS
6.5.1 KEY TECHNOLOGIES
6.5.1.1 Affinity chromatography
6.5.1.2 Elisa technology
6.5.2 COMPLEMENTARY TECHNOLOGIES
6.5.2.1 High-performance liquid chromatography (HPLC)
6.5.3 ADJACENT TECHNOLOGIES
6.5.3.1 Polymerase chain reaction (PCR)

6.6 PATENT ANALYSIS
FIGURE 34 PATENTS GRANTED FOR MYCOTOXINS TESTING MARKET, 2014–2024
FIGURE 35 REGIONAL ANALYSIS OF PATENT GRANTED FOR MYCOTOXIN TESTING MARKET, 2014–2024
TABLE 11 KEY PATENTS PERTAINING TO MYCOTOXIN TESTING, 2014–2024
6.7 CASE STUDY ANALYSIS
6.7.1 CONNECTING MILLS AND FARMS TO MYCOTOXINS WITH ALLTECH RAPIREAD
6.7.2 PROTECTING PETS FROM MYCOTOXINS WITH CHARM SCIENCES' FUMQ-FAST5-X
6.7.3 ENHANCING MYCOTOXIN DETECTION CAPABILITIES AT SYMBIO LABORATORIES
6.8 TRADE ANALYSIS
6.8.1 EXPORT SCENARIO OF HS CODE 3822
FIGURE 36 EXPORT VALUE OF HS CODE 3822 FOR KEY COUNTRIES, 2019–2023 (USD THOUSAND)
TABLE 12 EXPORT VALUE OF HS CODE 3822, BY KEY COUNTRY, 2019–2023 (USD THOUSAND)
6.8.2 IMPORT SCENARIO OF HS CODE 3822
FIGURE 37 IMPORT VALUE OF HS CODE 3822 FOR KEY COUNTRIES, 2019–2023 (USD THOUSAND)
TABLE 13 IMPORT VALUE OF HS CODE 3822, BY KEY COUNTRY, 2019–2023 (USD THOUSAND)
6.9 KEY CONFERENCES & EVENTS
TABLE 14 MYCOTOXIN TESTING MARKET: DETAILED LIST OF CONFERENCES AND EVENTS, 2024–2025
6.10 REGULATORY LANDSCAPE
6.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
TABLE 15 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
TABLE 16 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
TABLE 17 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
TABLE 18 SOUTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
TABLE 19 MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND

OTHER ORGANIZATIONS
6.10.2 NORTH AMERICA
6.10.2.1 US
6.10.2.1.1 Codex Alimentarius
6.10.2.1.2 Federal legislation
6.10.2.1.3 State-level legislation
6.10.2.1.4 Food Code
6.10.2.1.5 HACCP
6.10.2.1.6 Food safety regulations for fruit & vegetable growers
6.10.2.1.7 Federal Food, Drug, and Cosmetic Act (FFDCA)
6.10.2.1.8 US Food and Drug Administration (FDA)
6.10.2.1.9 United States Grain Standards Act
6.10.2.1.10 Toxic Substances Control Act of 1976
TABLE 20 US: AFLATOXIN B1 & M1 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 21 US: DEOXYNIVALENOL REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 22 US: FUMONISIN B1, B2, AND B3 REGULATORY LIMITS FOR FOOD AND FEED (PPM)
6.10.3 CANADA
6.10.3.1 Canadian Food Inspection Agency (CFIA)
6.10.3.2 Canadian Grain Commission
6.10.3.3 Agriculture and Agri-Food Canada
6.10.3.4 International Food Chemical Safety Liaison Group (IFCSLG)
6.10.3.5 Codex Committee on Contaminants in Food (CCCF)
6.10.4 MEXICO
6.11 EUROPE
6.11.1 EUROPEAN UNION
TABLE 23 EU: AFLATOXIN B1 & M1 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 24 EU: FUMONISIN B1 & B2 REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 25 EU: OCHRATOXIN REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 26 EU: CITRININ, PATULIN, AND TROPANE ALKALOIDS REGULATORY LIMITS FOR FOOD (PPB)
TABLE 27 EU: ZEARALENONE REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 28 EU: T-2 & HT-2 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 29 EU: DEOXYNIVALENOL REGULATORY LIMITS FOR FOOD AND FEED (PPM)

6.11.1.1 European Union animal health compliance and reference laboratories
6.11.1.2 General Food Law for Mycotoxin
6.11.1.3 Concerning Mycotoxins in Feed
6.11.1.4 Concerning Mycotoxins in Food
6.11.1.5 Concerning Mycotoxins in Food of Animal Origin
6.11.1.6 Commission rules (imposing special conditions)
6.11.1.7 Other Mycotoxin-related Legislation
6.11.1.8 European Union-harmonized regulations
6.11.1.9 Toxin regulations
6.11.1.9.1 Ochratoxin A
TABLE 30 EU: COMMISSION REGULATION FOR OCHRATOXIN A
6.11.1.9.2 Fusarium Toxins
6.11.1.9.3 Aflatoxins
6.11.2 GERMANY
6.11.3 UK
6.12 ASIA PACIFIC
TABLE 31 JAPAN: AFLATOXIN B1 & M1 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 32 JAPAN: DEOXYNIVALENOL REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 33 INDONESIA: AFLATOXIN B1 & M1 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 34 INDONESIA: MYCOTOXIN REGULATORY LIMITS FOR FOOD (PPB)
TABLE 35 MALAYSIA: MYCOTOXIN REGULATORY LIMITS FOR FOOD (PPB)
TABLE 36 SOUTH KOREA: MYCOTOXIN REGULATORY LIMITS FOR FOOD (PPB)
6.12.1 CHINA
TABLE 37 CHINA: AFLATOXIN B1 & M1 REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 38 CHINA: DEOXYNIVALENOL REGULATORY LIMITS FOR FOOD AND FEED (PPM)
TABLE 39 CHINA: OCHRATOXIN REGULATORY LIMITS FOR FOOD AND FEED (PPB)
TABLE 40 CHINA: ZEARALENONE REGULATORY LIMITS FOR FOOD AND FEED (PPB)
6.12.2 INDIA
6.12.2.1 Food Safety and Standards Act, 2006
6.12.2.2 Food safety standards amendment regulations, 2011
6.12.2.3 Food safety standards amendment regulations, 2012
6.12.3 AUSTRALIA

6.12.3.1 Food Standards Australia-New Zealand
6.12.4 NEW ZEALAND
6.12.5 MIDDLE EAST
6.12.5.1 UAE
6.12.6 AFRICA
6.13 PORTER'S FIVE FORCES ANALYSIS
TABLE 41 PORTER'S FIVE FORCES' IMPACT ON MYCOTOXIN TESTING MARKET
FIGURE 38 MYCOTOXIN TESTING MARKET: PORTER'S FIVE FORCES ANALYSIS
6.13.1 THREAT OF NEW ENTRANTS
6.13.2 THREAT OF SUBSTITUTES
6.13.3 BARGAINING POWER OF BUYERS
6.13.4 BARGAINING POWER OF SUPPLIERS
6.13.5 INTENSITY OF COMPETITIVE RIVALRY
6.14 KEY STAKEHOLDERS AND BUYING CRITERIA
6.14.1 KEY STAKEHOLDERS IN BUYING PROCESS
FIGURE 39 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP SAMPLES
TABLE 42 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE MODES OF APPLICATION
6.14.2 BUYING CRITERIA
FIGURE 40 KEY BUYING CRITERIA FOR TOP TWO SAMPLES
TABLE 43 KEY BUYING CRITERIA FOR TOP TWO SAMPLES

7 MYCOTOXIN TESTING MARKET, BY TYPE

7.1 INTRODUCTION
TABLE 44 MYCOTOXINS: OCCURRENCE, SOURCE, AND HEALTH EFFECTS
FIGURE 41 MYCOTOXIN TESTING MARKET, BY TYPE, 2020 VS. 2025 (USD MILLION)
TABLE 45 MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 46 MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
7.2 AFLATOXINS
7.2.1 HIGHLY POTENT AND FOUND IN HOT & HUMID REGIONS
TABLE 47 FDA ACTION LEVELS FOR AFLATOXINS (PPB)
TABLE 48 AFLATOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 49 AFLATOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.3 OCHRATOXINS
7.3.1 POTENT NEPHROTOXIN AFFECTING HUMAN AND ANIMAL HEALTH
TABLE 50 AVERAGE CONCENTRATIONS OF OCHRATOXIN A IN DIFFERENT

FOOD PRODUCTS (µG/KG)
TABLE 51 OCHRATOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 52 OCHRATOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.4 FUMONISINS
7.4.1 PRESENCE IN CORN PRODUCTS MAKE THEM CONCERN IN ANIMAL FEED
TABLE 53 FUMONISIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 54 FUMONISIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.5 DEOXYNIVALENOL
7.5.1 DON CONTAMINATION MAINLY DURING POST-HARVEST HANDLING TO BE SAFETY CONCERN
TABLE 55 DEOXYNIVALENOL TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 56 DEOXYNIVALENOL TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.6 TRICHOTHECENES
7.6.1 MONOGASTRIC ANIMALS IN COLD AND MOIST REGIONS HIGHLY SUSCEPTIBLE TO TRICHOTHECENES
TABLE 57 TRICHOTHECENE TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 58 TRICHOTHECENE TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.7 ZEARALENONE
7.7.1 ESTROGENIC PROPERTIES TO ADVERSELY AFFECT REPRODUCTIVE HEALTH OF ANIMALS AND HUMANS
TABLE 59 ZEARALENONE TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 60 ZEARALENONE TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.8 PATULIN
7.8.1 HIGHER OCCURRENCE IN AGRICULTURAL PRODUCE IN TEMPERATE REGIONS
TABLE 61 PATULIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 62 PATULIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
7.9 OTHER TYPES
TABLE 63 OTHER MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 64 OTHER MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD

MILLION)

8 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY

8.1 INTRODUCTION
FIGURE 42 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024 VS. 2029 (USD MILLION)
TABLE 65 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 66 MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
FIGURE 43 MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY-& SPECTROSCOPY-BASED TECHNOLOGY, 2024 VS. 2029 (USD MILLION)
TABLE 67 MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY-& SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 68 MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY-& SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)
8.2 CHROMATOGRAPHY- & SPECTROSCOPY-BASED
8.2.1 INCREASE IN TREND OF USING PORTABLE SPECTRO-PHOTOMETERS OFFERING SIMPLICITY, SPEED, AND SELECTIVITY
TABLE 69 CHROMATOGRAPHY- & SPECTROSCOPY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 70 CHROMATOGRAPHY- & SPECTROSCOPY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
8.2.2 HIGH-PERFORMANCE LIQUID CHROMATOGRAPHY (HPLC)
8.2.2.1 High accuracy and reliability of HPLC
TABLE 71 HIGH-PERFORMANCE LIQUID CHROMATOGRAPHY (HPLC) MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 72 HIGH-PERFORMANCE LIQUID CHROMATOGRAPHY (HPLC) MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)
8.2.3 OTHER CHROMATOGRAPHY- & SPECTROSCOPY-BASED
8.2.3.1 Gas chromatography
8.2.3.2 Liquid chromatography
8.2.3.3 Coupled chromatography
8.2.3.4 Tandem spectrometry
TABLE 73 OTHER CHROMATOGRAPHY- & SPECTROSCOPY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 74 OTHER CHROMATOGRAPHY- & SPECTROSCOPY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)

8.3 IMMUNOASSAY-BASED
8.3.1 ELISA TECHNIQUE: MAJORLY USED IN DETECTION OF AFLATOXINS IN FOOD PRODUCTS AND OCHRATOXINS IN BABY FOOD
TABLE 75 IMMUNOASSAY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 76 IMMUNOASSAY-BASED MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD MILLION)

9 MYCOTOXIN TESTING MARKET, BY SAMPLE

9.1 INTRODUCTION
FIGURE 44 MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024 VS. 2029 (USD MILLION)
TABLE 77 MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 78 MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
9.2 FOOD
TABLE 79 MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 80 MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 81 MYCOTOXIN TESTING MARKET IN FOOD, BY REGION, 2019–2023 (USD MILLION)
TABLE 82 MYCOTOXIN TESTING MARKET IN FOOD, BY REGION, 2024–2029 (USD MILLION)
9.2.1 CEREALS, GRAINS, AND PULSES
9.2.1.1 Cereals more susceptible to mycotoxin contamination during vegetation or storage stage
TABLE 83 MYCOTOXINS IN STAPLE CEREALS AND GRAINS
TABLE 84 LEGAL LIMITS FOR MYCOTOXINS IN GRAINS INTENDED FOR HUMAN CONSUMPTION (PPB)
TABLE 85 MYCOTOXIN TESTING MARKET IN CEREALS & GRAINS, BY REGION, 2019–2023 (USD MILLION)
TABLE 86 MYCOTOXIN TESTING MARKET IN CEREALS & GRAINS, BY REGION, 2024–2029 (USD MILLION)
9.2.2 MILK & MILK PRODUCTS
9.2.2.1 Aflatoxin M1 in milk and milk products poses high risk
TABLE 87 INTERNATIONAL LIMITS FOR AFM1 IN DAIRY PRODUCTS FOR HUMAN

CONSUMPTION
TABLE 88 MYCOTOXIN TESTING MARKET IN MILK & MILK PRODUCTS, BY REGION, 2019–2023 (USD MILLION)
TABLE 89 MYCOTOXIN TESTING MARKET IN MILK & MILK PRODUCTS, BY REGION, 2024–2029 (USD MILLION)
9.2.3 MEAT, POULTRY, AND SEAFOOD
9.2.3.1 Commonly occurring mycotoxins in poultry: Aflatoxins, ochratoxins, trichothecenes, and fumonisins
TABLE 90 MYCOTOXIN TESTING MARKET IN MEAT, POULTRY, AND SEAFOOD, BY REGION, 2019–2023 (USD MILLION)
TABLE 91 MYCOTOXIN TESTING MARKET IN MEAT, POULTRY, AND SEAFOOD, BY REGION, 2024–2029 (USD MILLION)
9.2.4 NUTS, SEEDS, AND SPICES
9.2.4.1 Thin Layer Chromatography (TLC): Widely adopted to detect presence of mycotoxins in nuts
TABLE 92 MYCOTOXIN TESTING MARKET IN NUTS, SEEDS, AND SPICES, BY REGION, 2019–2023 (USD MILLION)
TABLE 93 MYCOTOXIN TESTING MARKET IN NUTS, SEEDS, AND SPICES, BY REGION, 2024–2029 (USD MILLION)
9.2.5 FRUITS & VEGETABLES
9.2.5.1 Ozone used by food technologists for aflatoxin decontamination in fruits and vegetables
TABLE 94 MYCOTOXIN TESTING MARKET IN FRUITS & VEGETABLES, BY REGION, 2019–2023 (USD MILLION)
TABLE 95 MYCOTOXIN TESTING MARKET IN FRUITS & VEGETABLES, BY REGION, 2024–2029 (USD MILLION)
9.2.6 OTHER FOOD TYPES
TABLE 96 MYCOTOXIN TESTING MARKET IN OTHER FOOD TYPES, BY REGION, 2019–2023 (USD MILLION)
TABLE 97 MYCOTOXIN TESTING MARKET IN OTHER FOOD TYPES, BY REGION, 2024–2029 (USD MILLION)
9.3 FEED
TABLE 98 MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 99 MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 100 MYCOTOXIN TESTING MARKET IN FEED, BY REGION, 2019–2023 (USD MILLION)
TABLE 101 MYCOTOXIN TESTING MARKET IN FEED, BY REGION, 2024–2029

(USD MILLION)
9.3.1 CEREALS & CEREAL BY-PRODUCTS
9.3.1.1 Mycotoxin detection in feed conducted by using high-end technologies such as GC and LC-MS/GC-MS
TABLE 102 LEGAL LIMITS FOR MYCOTOXINS IN GRAIN INTENDED FOR FEED
TABLE 103 FEED: FDA GUIDELINES & HEALTH EFFECTS OF MYCOTOXINS IN CEREALS & CEREAL BY-PRODUCTS
TABLE 104 MYCOTOXIN TESTING MARKET IN CEREALS & CEREAL BY-PRODUCTS, BY REGION, 2019–2023 (USD MILLION)
TABLE 105 MYCOTOXIN TESTING MARKET IN CEREALS & CEREAL BY-PRODUCTS, BY REGION, 2024–2029 (USD MILLION)
9.3.2 SEEDS & SEED PRODUCTS
9.3.2.1 Immunoassay- and chromatography-based technologies: Commonly used to detect mycotoxins in oil meals and cakes
TABLE 106 FEED: FDA GUIDELINES & HEALTH EFFECTS FOR AFLATOXIN IN COTTONSEED MEAL
TABLE 107 MYCOTOXIN TESTING MARKET IN SEED & SEED PRODUCTS, BY REGION, 2019–2023 (USD MILLION)
TABLE 108 MYCOTOXIN TESTING MARKET IN SEED & SEED PRODUCTS, BY REGION, 2024–2029 (USD MILLION)
9.3.3 FORAGE & SILAGE
9.3.3.1 Contaminated silage consumption by cattle to lead to lower performance and production of mycotoxin-contaminated milk
TABLE 109 MYCOTOXIN TESTING MARKET IN FORAGE & SILAGE, BY REGION, 2019–2023 (USD MILLION)
TABLE 110 MYCOTOXIN TESTING MARKET IN FORAGE & SILAGE, BY REGION, 2024–2029 (USD MILLION)
9.3.4 OTHER FEED TYPES
TABLE 111 MYCOTOXIN TESTING MARKET IN OTHER FEED TYPES, BY REGION, 2019–2023 (USD MILLION)
TABLE 112 MYCOTOXIN TESTING MARKET IN OTHER FEED TYPES, BY REGION, 2024–2029 (USD MILLION)

10 MYCOTOXIN TESTING MARKET, BY REGION

10.1 INTRODUCTION
TABLE 113 MYCOTOXIN TESTING MARKET, BY REGION, 2019–2023 (USD MILLION)
TABLE 114 MYCOTOXIN TESTING MARKET, BY REGION, 2024–2029 (USD

MILLION)
FIGURE 45 CHINA TO RECORD FASTEST GROWTH IN GLOBAL MYCOTOXIN TESTING MARKET
10.2 NORTH AMERICA
10.2.1 NORTH AMERICA: RECESSION IMPACT
FIGURE 46 NORTH AMERICA: RECESSION IMPACT ANALYSIS, 2024
TABLE 115 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2019–2023 (USD MILLION)
TABLE 116 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)
TABLE 117 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 118 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
TABLE 119 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 120 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 121 NORTH AMERICA: MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 122 NORTH AMERICA: MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 123 NORTH AMERICA: MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 124 NORTH AMERICA: MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 125 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 126 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
TABLE 127 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 128 NORTH AMERICA: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)
10.2.2 US
10.2.2.1 Strong regulatory supervision led by institutions such as FDA acts to drive expansion of mycotoxin testing landscape

FIGURE 47 US: CORN OCCURRENCE STATUS, BY MYCOTOXIN GROUP, 2022
TABLE 129 US: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 130 US: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 131 US: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 132 US: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.2.3 CANADA
10.2.3.1 Deoxynivalenol, zearalenone, and T2-HT2 pose significant risks to grain and forage crops in Canada
TABLE 133 CANADA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 134 CANADA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 135 CANADA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 136 CANADA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.2.4 MEXICO
10.2.4.1 Widespread occurrence of corn ear rot fungi; resulting mycotoxins to have substantial effect on mycotoxin testing industry
TABLE 137 MEXICO: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 138 MEXICO: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 139 MEXICO: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 140 MEXICO: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.3 EUROPE
FIGURE 48 EUROPE: MYCOTOXIN TESTING MARKET: SNAPSHOT
10.3.1 EUROPE: RECESSION IMPACT
FIGURE 49 EUROPE: RECESSION IMPACT ANALYSIS, 2024
TABLE 141 EUROPE: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2019–2023 (USD MILLION)
TABLE 142 EUROPE: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 143 EUROPE: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 144 EUROPE: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
TABLE 145 EUROPE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 146 EUROPE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 147 EUROPE: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 148 EUROPE: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 149 EUROPE: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 150 EUROPE: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 151 EUROPE: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 152 EUROPE: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
TABLE 153 EUROPE: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 154 EUROPE: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)
10.3.2 GERMANY
10.3.2.1 Increase in demand for rigorous quality control in meat production
TABLE 155 GERMANY: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 156 GERMANY: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 157 GERMANY: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 158 GERMANY: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.3.3 UK
10.3.3.1 Need to ensure animal health and prevent product recalls for manufacturers
TABLE 159 UK: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 160 UK: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD

MILLION)
TABLE 161 UK: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 162 UK: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.3.4 FRANCE
10.3.4.1 Presence of robust food processing industry to create demand for mycotoxin testing to mitigate contamination risks
TABLE 163 FRANCE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 164 FRANCE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 165 FRANCE: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 166 FRANCE: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.3.5 ITALY
10.3.5.1 With Italian agri-food exports on rise, maintaining strict quality standards to be crucial
TABLE 167 ITALY: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 168 ITALY: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 169 ITALY: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 170 ITALY: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.3.6 POLAND
10.3.6.1 Need to mitigate risks associated with mycotoxin contamination with mycotoxin management products in animal feed
FIGURE 50 POLAND: MYCOTOXIN OCCURRENCE IN NEWLY HARVESTED WHEAT, 2020
TABLE 171 POLAND: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 172 POLAND: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 173 POLAND: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 174 POLAND: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD

THOUSAND)
10.3.7 REST OF EUROPE
TABLE 175 REST OF EUROPE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 176 REST OF EUROPE: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 177 REST OF EUROPE: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 178 REST OF EUROPE: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.4 ASIA PACIFIC
FIGURE 51 ASIA PACIFIC: MYCOTOXIN TESTING MARKET SNAPSHOT
10.4.1 ASIA PACIFIC: RECESSION IMPACT
FIGURE 52 ASIA PACIFIC: RECESSION IMPACT ANALYSIS, 2024
TABLE 179 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2019–2023 (USD MILLION)
TABLE 180 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)
TABLE 181 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 182 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
TABLE 183 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 184 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 185 ASIA PACIFIC: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 186 ASIA PACIFIC: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 187 ASIA PACIFIC: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 188 ASIA PACIFIC: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 189 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 190 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
TABLE 191 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY

CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 192 ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)
10.4.2 CHINA
10.4.2.1 Need to mitigate rise in aflatoxin levels in peanuts for exports
TABLE 193 CHINA: REGULATORY LIMITS OF MYCOTOXIN IN FOOD (PPB)
TABLE 194 CHINA: REGULATORY LIMITS OF MYCOTOXIN IN FEED (PPB)
TABLE 195 CHINA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 196 CHINA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 197 CHINA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 198 CHINA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.4.3 INDIA
10.4.3.1 Tropical climate conducive for aflatoxin, T-2, and ochratoxin contamination
TABLE 199 INDIA: MYCOTOXIN LIMITS FOR SPECIFIC FOOD ITEMS (µG/KG)
TABLE 200 INDIA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 201 INDIA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 202 INDIA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 203 INDIA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.4.4 JAPAN
10.4.4.1 Stringent aflatoxin regulations to offer test providers opportunities to collaborate with importers and manufacturers
TABLE 204 JAPAN: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 205 JAPAN: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 206 JAPAN: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 207 JAPAN: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)

10.4.5 AUSTRALIA & NEW ZEALAND
10.4.5.1 Development in regulatory standards by FSANZ to offer growth opportunities
TABLE 208 AUSTRALIA & NEW ZEALAND: MYCOTOXIN LIMITS FOR FOOD ITEMS SET BY FSANZ (PPB)
TABLE 209 AUSTRALIA & NEW ZEALAND: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 210 AUSTRALIA & NEW ZEALAND: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 211 AUSTRALIA & NEW ZEALAND: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 212 AUSTRALIA & NEW ZEALAND: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.4.6 REST OF ASIA PACIFIC
TABLE 213 REST OF ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 214 REST OF ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 215 REST OF ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 216 REST OF ASIA PACIFIC: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.5 SOUTH AMERICA
10.5.1 SOUTH AMERICA: RECESSION IMPACT
FIGURE 53 SOUTH AMERICA: RECESSION IMPACT ANALYSIS, 2023
TABLE 217 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2019–2023 (USD MILLION)
TABLE 218 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)
TABLE 219 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 220 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
TABLE 221 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 222 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 223 SOUTH AMERICA: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 224 SOUTH AMERICA: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY

FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 225 SOUTH AMERICA: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 226 SOUTH AMERICA: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 227 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 228 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
TABLE 229 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 230 SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)
10.5.2 BRAZIL
10.5.2.1 Increased trade, especially with developed countries, and improved detection methods
TABLE 231 BRAZIL: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 232 BRAZIL: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 233 BRAZIL: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 234 BRAZIL: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.5.3 ARGENTINA
10.5.3.1 High contamination of aflatoxins and zearalenone in soybean, produced largely by Argentina
TABLE 235 ARGENTINA: AFLATOXIN LIMITS (PPB)
TABLE 236 ARGENTINA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 237 ARGENTINA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 238 ARGENTINA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 239 ARGENTINA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.5.4 REST OF SOUTH AMERICA

TABLE 240 REST OF SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 241 REST OF SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 242 REST OF SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 243 REST OF SOUTH AMERICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.6 REST OF THE WORLD (ROW)
10.6.1 ROW: RECESSION IMPACT
FIGURE 54 ROW: RECESSION IMPACT ANALYSIS, 2023
TABLE 244 ROW: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2019–2023 (USD MILLION)
TABLE 245 ROW: MYCOTOXIN TESTING MARKET, BY COUNTRY, 2024–2029 (USD MILLION)
TABLE 246 ROW: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD MILLION)
TABLE 247 ROW: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD MILLION)
TABLE 248 ROW: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 249 ROW: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 250 ROW: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2019–2023 (USD MILLION)
TABLE 251 ROW: FOOD MYCOTOXIN TESTING MARKET IN FOOD, BY FOOD TYPE, 2024–2029 (USD MILLION)
TABLE 252 ROW: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2019–2023 (USD MILLION)
TABLE 253 ROW: FEED MYCOTOXIN TESTING MARKET IN FEED, BY FEED TYPE, 2024–2029 (USD MILLION)
TABLE 254 ROW: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 255 ROW: MYCOTOXIN TESTING MARKET, BY TECHNOLOGY, 2024–2029 (USD MILLION)
TABLE 256 ROW: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2019–2023 (USD MILLION)
TABLE 257 ROW: MYCOTOXIN TESTING MARKET, BY CHROMATOGRAPHY- & SPECTROSCOPY-BASED TECHNOLOGY, 2024–2029 (USD MILLION)

10.6.2 AFRICA
10.6.2.1 Recurring contamination challenges and establishment of safety standards
TABLE 258 AFRICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 259 AFRICA: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 260 AFRICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 261 AFRICA: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)
10.6.3 MIDDLE EAST
10.6.3.1 Public health efforts to increase awareness of mycotoxin contamination
TABLE 262 MIDDLE EAST: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2019–2023 (USD MILLION)
TABLE 263 MIDDLE EAST: MYCOTOXIN TESTING MARKET, BY SAMPLE, 2024–2029 (USD MILLION)
TABLE 264 MIDDLE EAST: MYCOTOXIN TESTING MARKET, BY TYPE, 2019–2023 (USD THOUSAND)
TABLE 265 MIDDLE EAST: MYCOTOXIN TESTING MARKET, BY TYPE, 2024–2029 (USD THOUSAND)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW
11.2 KEY PLAYERS STRATEGIES/RIGHT TO WIN
TABLE 266 OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN MYCOTOXIN TESTING MARKET, 2020–2024
11.3 REVENUE ANALYSIS
FIGURE 55 REVENUE ANALYSIS OF KEY PLAYERS, 2019–2023 (USD BILLION)
11.4 MARKET SHARE ANALYSIS
FIGURE 56 MYCOTOXIN TESTING MARKET: MARKET SHARE ANALYSIS, 2023
TABLE 267 MYCOTOXIN TESTING MARKET: DEGREE OF COMPETITION, 2020–2024
11.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023
11.5.1 STARS
11.5.2 EMERGING LEADERS
11.5.3 PERVASIVE PLAYERS
11.5.4 PARTICIPANTS
FIGURE 57 MYCOTOXIN TESTING MARKET: COMPANY EVALUATION MATRIX

(KEY PLAYERS), 2023
11.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023
FIGURE 58 COMPANY FOOTPRINT
11.5.5.1 Regional footprint
TABLE 268 REGIONAL FOOTPRINT
11.5.5.2 Type footprint
TABLE 269 TYPE FOOTPRINT
11.5.5.3 Sample footprint
TABLE 270 SAMPLE FOOTPRINT
11.5.5.4 Technology footprint
TABLE 271 MYCOTOXIN TESTING MARKET FOOTPRINT, BY TECHNOLOGY
11.6 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023
11.6.1 PROGRESSIVE COMPANIES
11.6.2 RESPONSIVE COMPANIES
11.6.3 DYNAMIC COMPANIES
11.6.4 STARTING BLOCKS
FIGURE 59 MYCOTOXIN TESTING MARKET: COMPANY EVALUATION MATRIX (STARTUPS/SMES), 2023
11.6.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023
11.6.5.1 Detailed list of key startups/SMEs
TABLE 272 MYCOTOXIN TESTING MARKET: KEY STARTUPS/SMES
11.6.5.2 Competitive benchmarking of key startups/SMEs
TABLE 273 MYCOTOXIN TESTING MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES, BY TYPE AND SAMPLE
TABLE 274 MYCOTOXIN TESTING MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES, BY TECHNOLOGY
TABLE 275 MYCOTOXIN TESTING MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES, BY REGION
11.7 COMPANY VALUATION AND FINANCIAL METRICS
11.7.1 COMPANY VALUATION
FIGURE 60 COMPANY VALUATION OF KEY PLAYERS, 2024 (USD BILLION)
11.7.2 EV/EBITDA
FIGURE 61 FINANCIAL METRICS OF EV/EBITDA OF KEY COMPANIES, 2024
11.8 COMPETITIVE SCENARIO AND TRENDS
11.8.1 PRODUCT/SERVICE LAUNCHES
TABLE 276 MYCOTOXIN TESTING MARKET: PRODUCT/SERVICE LAUNCHES, JANUARY 2020–MAY 2024
11.8.2 DEALS
TABLE 277 MYCOTOXIN TESTING MARKET: DEALS, JANUARY 2020–MAY 2024

11.8.3 OTHERS
TABLE 278 MYCOTOXIN TESTING MARKET: EXPANSIONS, JANUARY 2020–MAY 2024

12 COMPANY PROFILES

12.1 KEY PLAYERS
(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*
12.1.1 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA.
TABLE 279 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA: BUSINESS OVERVIEW
FIGURE 62 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA: COMPANY SNAPSHOT
TABLE 280 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 281 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA: DEALS
TABLE 282 SGS SOCI?T? G?N?RALE DE SURVEILLANCE SA: EXPANSIONS
12.1.2 BUREAU VERITAS
TABLE 283 BUREAU VERITAS: BUSINESS OVERVIEW
FIGURE 63 BUREAU VERITAS: COMPANY SNAPSHOT
TABLE 284 BUREAU VERITAS: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.3 INTERTEK GROUP PLC
TABLE 285 INTERTEK GROUP PLC: BUSINESS OVERVIEW
FIGURE 64 INTERTEK GROUP PLC: COMPANY SNAPSHOT
TABLE 286 INTERTEK GROUP PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.4 DSM-FIRMENICH
TABLE 287 DSM-FIRMENICH: BUSINESS OVERVIEW
FIGURE 65 DSM-FIRMENICH: COMPANY SNAPSHOT
TABLE 288 DSM-FIRMENICH: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 289 DSM-FIRMENICH: DEALS
12.1.5 EUROFINS SCIENTIFIC
TABLE 290 EUROFINS SCIENTIFIC: BUSINESS OVERVIEW
FIGURE 66 EUROFINS SCIENTIFIC: COMPANY SNAPSHOT
TABLE 291 EUROFINS SCIENTIFIC: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 292 EUROFINS SCIENTIFIC: DEALS

12.1.6 ALS
TABLE 293 ALS: BUSINESS OVERVIEW
FIGURE 67 ALS: COMPANY SNAPSHOT
TABLE 294 ALS: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 295 ALS: DEALS
12.1.7 NEOGEN CORPORATION
TABLE 296 NEOGEN CORPORATION: BUSINESS OVERVIEW
FIGURE 68 NEOGEN CORPORATION: COMPANY SNAPSHOT
TABLE 297 NEOGEN CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.8 ASUREQUALITY
TABLE 298 ASUREQUALITY: BUSINESS OVERVIEW
TABLE 299 ASUREQUALITY: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.9 SYMBIO LABS
TABLE 300 SYMBIO LABS: BUSINESS OVERVIEW
FIGURE 69 SYMBIO LABS: COMPANY SNAPSHOT
TABLE 301 SYMBIO LABS: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 302 SYMBIO LABS: PRODUCT LAUNCHES
12.1.10 MICROBAC LABORATORIES, INC.
TABLE 303 MICROBAC LABORATORIES, INC.: BUSINESS OVERVIEW
TABLE 304 MICROBAC LABORATORIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.11 INSTITUT MERIEUX
TABLE 305 INSTITUT MERIEUX: BUSINESS OVERVIEW
TABLE 306 INSTITUT MERIEUX: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 307 INSTITUT MERIEUX: DEALS
12.1.12 PREMIER ANALYTICAL SERVICES
TABLE 308 PREMIER ANALYTICAL SERVICES: BUSINESS OVERVIEW
TABLE 309 PREMIER ANALYTICAL SERVICES: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.13 CHARM SCIENCES
TABLE 310 CHARM SCIENCES: BUSINESS OVERVIEW
TABLE 311 CHARM SCIENCES: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 312 CHARM SCIENCES: PRODUCT LAUNCHES
12.1.14 OMIC USA INC.
TABLE 313 OMIC USA INC.: BUSINESS OVERVIEW
TABLE 314 OMIC USA INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.15 BIO-CHECK (UK) LTD.
TABLE 315 BIO-CHECK (UK) LTD.: BUSINESS OVERVIEW

TABLE 316 BIO-CHECK (UK) LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.1.16 DAIRYLAND LABORATORIES, INC.
TABLE 317 DAIRYLAND LABORATORIES, INC.: BUSINESS OVERVIEW
TABLE 318 DAIRYLAND LABORATORIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
TABLE 319 DAIRYLAND LABORATORIES, INC.: DEALS
12.2 OTHER PLAYERS
12.2.1 IEH LABORATORIES & CONSULTING GROUP
TABLE 320 IEH LABORATORIES & CONSULTING GROUP: BUSINESS OVERVIEW
TABLE 321 IEH LABORATORIES & CONSULTING GROUP: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.2.2 AES LABORATORIES PVT. LTD.
TABLE 322 AES LABORATORIES PVT. LTD.: BUSINESS OVERVIEW
TABLE 323 AES LABORATORIES PVT. LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.2.3 TRILOGY ANALYTICAL LABORATORY
TABLE 324 TRILOGY ANALYTICAL LABORATORY: COMPANY OVERVIEW
TABLE 325 TRILOGY ANALYTICAL LABORATORY: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.2.4 ELISA TECHNOLOGIES, INC.
TABLE 326 ELISA TECHNOLOGIES, INC.: BUSINESS OVERVIEW
TABLE 327 ELISA TECHNOLOGIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.2.5 TLR INTERNATIONAL LABORATORIES
TABLE 328 TLR INTERNATIONAL LABORATORIES: BUSINESS OVERVIEW
TABLE 329 TLR INTERNATIONAL LABORATORIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED
12.2.6 ENVIROLOGIX
12.2.7 EMSL ANALYTICAL, INC.
12.2.8 PROGNOSIS BIOTECH S.A.
12.2.9 ISSPLLAB
12.2.10 CULTIVATOR PHYTO LAB

13 ADJACENT AND RELATED MARKETS

13.1 INTRODUCTION
TABLE 330 ADJACENT MARKETS TO MYCOTOXIN TESTING MARKET
13.2 LIMITATIONS
13.3 FOOD SAFETY TESTING MARKET

13.3.1 MARKET DEFINITION
13.3.2 MARKET OVERVIEW
TABLE 331 FOOD SAFETY TESTING MARKET FOR MEAT, POULTRY, AND SEAFOOD, BY TARGET TESTED, 2017–2021 (USD MILLION)
TABLE 332 FOOD SAFETY TESTING MARKET FOR MEAT, POULTRY, AND SEAFOOD, BY TARGET TESTED, 2022–2027 (USD MILLION)
13.4 FOOD PATHOGEN TESTING MARKET
13.4.1 MARKET DEFINITION
13.4.2 MARKET OVERVIEW
TABLE 333 LISTERIA: FOOD PATHOGEN TESTING MARKET, BY REGION,

2018–2022 (USD MILLION)

TABLE 334 LISTERIA: FOOD PATHOGEN TESTING MARKET, BY REGION,

2023–2028 (USD MILLION)

*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

14 APPENDIX

14.1 DISCUSSION GUIDE
14.2 KNOWLEDGESTORE: MARKETSANDMARKETS’ SUBSCRIPTION PORTAL
14.3 AVAILABLE CUSTOMIZATIONS
14.4 RELATED REPORTS
14.5 AUTHOR DETAILS

+44 20 8123 2220
info@marketpublishers.com

I would like to order

Product name: Mycotoxin Testing Market Report by Type (Aflatoxins, Ochratoxin, Fumonisins, Zearalenone, Deoxynivalenol, Trichothecenes, Patulin), Technology (Chromatography- & Spectroscopy- Based, Immunoassay-Based), Sample, & Region - Global Forecast to 2029

Product link: https://marketpublishers.com/r/MD507F356E3EN.html

Price: US$ 3,217.50 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/MD507F356E3EN.html

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

**All fields are required

Custumer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at https://marketpublishers.com/docs/terms.html

+44 20 8123 2220
info@marketpublishers.com

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970