

# **Grain Analysis Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Grain Type (Cereals, Oilseeds and Pulses), By Target Tested (Pathogens, Pesticides, GMO, Mycotoxins and Others), By Technology (Traditional Technology and Rapid Technology), By End Use (Food and Feed), By Component (Instruments, Reagents & Consumables and Reference Materials), By Region, By Competition, 2019-2029F**

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## **Abstracts**

Global Grain Analysis Market was valued at USD 2.15 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.25% through 2029. The global grain analysis market plays a vital role in the agriculture and food sector by offering crucial insights for stakeholders in grain production, processing, and distribution. Factors like increasing food safety concerns, demand for precise quality assessment, and the adoption of automated solutions are driving market growth. This market offers substantial opportunities for stakeholders throughout the agricultural and food supply chain. Leveraging advanced technologies, adhering to regulatory standards, and fostering innovation are key strategies for companies to seize these opportunities and contribute to the safety, quality, and sustainability of grain-based products worldwide.

### **Key Market Drivers**

Increasing Concerns About Food Safety

Growing awareness among consumers about the potential risks associated with foodborne illnesses, chemical contaminants, and adulteration has heightened concerns about food safety. Consumers are becoming more discerning and proactive in seeking information about the safety and quality of the food they consume. Consequently, there's a rising demand for transparent and reliable food safety measures, including rigorous testing and analysis of grains and grain-based products.

Governments and regulatory agencies worldwide are enacting increasingly stringent regulations to safeguard public health and ensure the safety of the food supply. These regulations encompass various aspects of food safety, including the permissible levels of contaminants such as pesticides, heavy metals, mycotoxins, and microbial pathogens in food products. Compliance with regulatory standards is mandatory for businesses involved in the production, processing, and distribution of grains, driving the need for comprehensive grain analysis solutions to meet regulatory requirements. Food safety incidents, product recalls, and contamination outbreaks can have severe financial and reputational consequences for businesses operating in the grain industry. In addition to potential legal liabilities and financial losses, such incidents can erode consumer trust and brand reputation, leading to long-term damage to business viability and market competitiveness. Therefore, businesses have a vested interest in implementing robust food safety management systems, including thorough analysis and testing of grains at various stages of the supply chain, to mitigate risks and safeguard their operations.

The globalization of food trade has facilitated the movement of grains and grain-based products across national borders, creating complex supply chains with diverse sources of raw materials and ingredients. While globalization presents opportunities for market expansion and diversification, it also poses challenges in terms of ensuring the safety and quality of imported and exported food products. As a result, there's a growing emphasis on harmonizing international food safety standards, enhancing traceability systems, and implementing risk-based approaches to food safety management. Grain analysis plays a crucial role in verifying the safety and authenticity of imported and exported grain products, thereby facilitating international trade and market access. The evolving nature of food production, processing, and distribution practices introduces new risks and contaminants that may not have been previously identified or adequately regulated. For example, emerging agricultural practices, changes in climate patterns, and evolving food processing technologies can lead to the emergence of novel contaminants, allergens, or microbial pathogens in grains. To address these emerging risks, businesses need to continuously monitor and analyze grains using state-of-the-art analytical techniques and methods capable of detecting and quantifying a wide range of contaminants and hazards.

Increasing concerns about food safety are driving the growth of the global grain analysis market by prompting greater consumer awareness and demand, imposing regulatory mandates, necessitating risk management for businesses, facilitating the globalization of food trade, and addressing emerging risks and contaminants. Businesses that prioritize food safety, invest in advanced grain analysis technologies, and adhere to regulatory standards can enhance their competitiveness, ensure consumer confidence, and contribute to the safety and integrity of the global food supply chain.

### Increase in The Incidence of Vitamin Deficiencies

The increase in the incidence of vitamin deficiencies is a concerning health trend that has been observed in various parts of the world. Modern diets that are high in processed foods, sugars, unhealthy fats, and low in whole fruits, vegetables, and whole grains can lead to inadequate intake of essential vitamins. Socioeconomic factors can restrict access to fresh, nutrient-dense foods, leading to diets that lack the necessary vitamins. People following restrictive diets, such as vegetarian or vegan diets, may be at a higher risk of certain vitamin deficiencies if they do not carefully plan their diets to include essential nutrients. Certain medical conditions and digestive disorders can impair nutrient absorption, leading to deficiencies even when a person's diet seems sufficient. As cultures adopt more processed and Westernized diets, traditional nutrient-rich foods may be replaced with energy-dense, nutrient-poor alternatives.

### Need for Accurate Quality Assessment

Accurate quality assessment is essential for ensuring consistency and uniformity in grain products throughout the production and processing stages. Grain quality can vary due to factors such as environmental conditions, soil composition, cultivation practices, and post-harvest handling. Therefore, businesses rely on precise analytical techniques to assess key quality parameters such as moisture content, protein levels, starch content, gluten content, and physical properties (e.g., size, shape, color) to maintain product quality standards and meet customer expectations. Farmers and agricultural producers require accurate quality assessment data to optimize their cultivation practices and maximize crop yields and quality. Analyzing grains for parameters such as nutrient content, soil composition, and pest infestation levels enables farmers to make informed decisions regarding seed selection, fertilization, irrigation, and pest control strategies. By leveraging grain analysis data, farmers can enhance crop productivity, reduce input costs, and improve overall agricultural sustainability.

Accurate quality assessment plays a crucial role in supply chain management, particularly in the procurement, storage, and transportation of grains. Traders, distributors, and grain handlers rely on analytical data to assess the quality and value of grain shipments, negotiate purchase contracts, and minimize financial risks associated with quality discrepancies or disputes. Accurate quality assessment helps mitigate the risk of product recalls, rejection, or rejection due to quality issues, thereby safeguarding business interests and reputation. In today's competitive marketplace, product differentiation is key to capturing consumer attention and maintaining a competitive edge. Accurate quality assessment enables businesses to differentiate their grain products based on superior quality attributes such as nutritional content, flavor profile, texture, and cooking characteristics. By highlighting the quality advantages of their products through labeling, marketing, and branding initiatives, companies can position themselves as premium suppliers and attract discerning consumers willing to pay a premium for higher quality grain products.

Regulatory agencies impose strict standards and regulations governing the quality and safety of grain products, both domestically and internationally. Accurate quality assessment is essential for ensuring compliance with regulatory requirements related to parameters such as food safety, nutritional labeling, allergen declaration, and maximum residue limits for pesticides and contaminants. Businesses must conduct thorough grain analysis to verify compliance with regulatory standards and demonstrate due diligence in ensuring the safety and integrity of their products. Ultimately, accurate quality assessment contributes to building consumer confidence and trust in grain products. Consumers are increasingly demanding transparency, authenticity, and quality assurance in the food they consume. By providing accurate and reliable information about the quality attributes of their grain products, businesses can instill confidence in consumers and enhance brand loyalty and reputation. Positive consumer experiences and word-of-mouth recommendations can drive repeat purchases and foster long-term relationships with customers.

The need for accurate quality assessment is a critical driver of growth in the global grain analysis market, enabling businesses to optimize production practices, manage supply chain risks, differentiate their products, comply with regulatory standards, and build consumer trust. By investing in advanced analytical technologies and expertise, businesses can capitalize on opportunities to enhance product quality, competitiveness, and sustainability in the dynamic and evolving grain industry.

### Growing Adoption of Automated Solutions

Automated solutions offer higher throughput and efficiency compared to traditional manual methods of grain analysis. Automated systems can process large volumes of samples rapidly and consistently, reducing the time and labor required for analysis. This increased efficiency enables businesses to streamline their operations, improve productivity, and meet growing demand for grain analysis services more effectively. Automated systems are capable of delivering highly accurate and precise results in grain analysis. By minimizing human error and variability, automated solutions ensure consistency in measurement and data interpretation, enhancing the reliability of analytical results. This level of accuracy is essential for meeting regulatory requirements, maintaining product quality standards, and making informed decisions in grain production, processing, and quality control.

The adoption of automated solutions in grain analysis helps businesses reduce operational costs and optimize resource utilization. Automated systems require less manual labor and supervision, leading to savings in labor costs and increased operational efficiency. Also, automated analysis processes consume fewer consumables and reagents, resulting in lower overall costs of analysis. These cost savings contribute to improved profitability and competitiveness for businesses operating in the grain industry. Automated solutions offer scalability and flexibility to accommodate varying sample volumes and analytical requirements. Whether processing a few samples or hundreds of samples per day, automated systems can adjust throughput and capacity to meet changing demand levels. Automated platforms are often modular and customizable, allowing businesses to tailor analytical workflows to their specific needs and preferences. This scalability and flexibility enable businesses to adapt to evolving market conditions and customer demands more effectively.

Automated solutions in grain analysis often integrate with advanced data management systems, enabling seamless data capture, analysis, and reporting. Integrated data management platforms facilitate real-time monitoring of analytical processes, data visualization, and interpretation, as well as data storage and retrieval. By centralizing and standardizing data management, automated systems enhance workflow efficiency, data integrity, and regulatory compliance for businesses involved in grain analysis. Technological advancements drive continuous innovation in automated grain analysis solutions, leading to the development of more sophisticated and user-friendly systems. Recent innovations include the integration of artificial intelligence (AI) and machine learning algorithms for data analysis and interpretation, the miniaturization of analytical instruments for portable and on-site testing applications, and the implementation of remote monitoring and control capabilities for unmanned analytical systems. These advancements expand the capabilities and applications of automated grain analysis

technology, opening up new opportunities for market growth and diversification.

The growing adoption of automated solutions is driving the growth of the global grain analysis market by improving efficiency, accuracy, cost-effectiveness, scalability, and technological innovation in grain analysis processes. Businesses that embrace automation can enhance their competitiveness, meet regulatory requirements, and deliver high-quality grain products to meet the needs of consumers and stakeholders in the agricultural and food sectors.

## Key Market Challenges

### High Initial Investment Costs

The major challenge in the global grain analysis market is the high initial investment required for implementing advanced analytical technologies and equipment. Sophisticated instruments such as near-infrared (NIR) spectrometers, high-performance liquid chromatography (HPLC) systems, and mass spectrometers can be costly to acquire, install, and maintain. Businesses may need to invest in infrastructure upgrades, laboratory facilities, and skilled personnel to support the implementation and operation of these technologies. For small and medium-sized enterprises (SMEs) with limited financial resources, the upfront capital expenditure associated with adopting advanced grain analysis solutions can be a significant barrier to entry, slowing down market growth and innovation.

### Shortage of Skilled Personnel

The challenge facing the global grain analysis market is the shortage of skilled personnel with expertise in analytical chemistry, food science, and data analysis. Analyzing grain samples requires specialized knowledge and technical proficiency in operating analytical instruments, interpreting analytical data, and complying with regulatory standards. However, there's a growing gap between the demand for qualified professionals and the availability of trained personnel in the labor market. This shortage of skilled talent can impede the adoption and utilization of advanced grain analysis technologies, limit the capacity of businesses to perform comprehensive analysis, and hinder innovation in the development of new analytical methods and solutions.

### Complex Regulatory Landscape

The global grain analysis market is subject to a complex and evolving regulatory



landscape, with regulations governing various aspects of grain quality, safety, and labeling varying across different regions and jurisdictions. Compliance with regulatory standards, such as maximum residue limits for pesticides, mycotoxin contamination levels, and nutritional labeling requirements, is essential for businesses operating in the grain industry to ensure consumer protection and maintain market access. However, navigating the maze of regulatory requirements can be challenging and resource-intensive for businesses, particularly those involved in cross-border trade and international markets. Ensuring regulatory compliance often involves conducting extensive testing, documentation, and reporting, as well as staying abreast of regulatory updates and changes. Failure to comply with regulatory standards can result in costly penalties, product recalls, and reputational damage, thereby slowing down market growth and hindering business expansion.

## Key Market Trends

### Advancements in Analytical Technologies

The significant trend driving the future growth of the global grain analysis market is the continual advancement of analytical technologies. Emerging technologies such as hyperspectral imaging, portable spectroscopy, and molecular diagnostics are revolutionizing grain analysis by offering faster, more accurate, and more versatile analytical capabilities. These technologies enable rapid on-site testing, real-time monitoring, and non-destructive analysis of grain samples, reducing the need for costly and time-consuming laboratory-based testing. Also, advancements in data analytics, artificial intelligence (AI), and machine learning (ML) are enhancing the interpretation and utilization of analytical data, enabling businesses to extract valuable insights, optimize processes, and make data-driven decisions. As these technologies become more accessible and affordable, they will drive increased adoption and innovation in the grain analysis market, fueling market growth and competitiveness.

### Focus on Food Safety and Quality Assurance

Major trend shaping the future growth of the global grain analysis market is the growing emphasis on food safety and quality assurance. With rising consumer awareness and regulatory scrutiny surrounding food safety issues, there's a heightened demand for robust and reliable grain analysis solutions that can accurately detect contaminants, toxins, and adulterants in grain products. Businesses across the grain supply chain are investing in advanced analytical technologies and quality control measures to ensure compliance with stringent food safety regulations, meet consumer expectations for safe

and high-quality products, and protect brand reputation. There's a growing trend towards traceability and transparency in the food supply chain, with consumers increasingly seeking information about the origin, production practices, and quality attributes of the grains they consume. As a result, grain analysis technologies that enable traceability, authenticity verification, and quality assurance will experience increased demand, driving market growth and innovation.

### Integration of Digital Solutions and IoT

The integration of digital solutions and Internet of Things (IoT) technologies is poised to revolutionize the future of the global grain analysis market. Digitalization enables seamless connectivity, data exchange, and remote monitoring throughout the grain supply chain, facilitating real-time decision-making, process optimization, and quality control. IoT-enabled sensors, smart devices, and cloud-based platforms are being deployed for monitoring environmental conditions, tracking grain shipments, and automating analytical processes. These digital solutions enable businesses to collect and analyze vast amounts of data from multiple sources, providing insights into grain quality, supply chain efficiency, and market trends. Blockchain technology is being increasingly utilized for enhancing transparency, traceability, and trust in the food supply chain by enabling secure and immutable record-keeping of grain transactions and quality attributes. As businesses embrace digital transformation and IoT integration, the demand for advanced grain analysis solutions that support digitalization initiatives will continue to grow, driving market expansion and innovation.

### Segmental Insights

#### Grain Type Insights

Based on the category of Grain Type, the Cereals segment emerged as the dominant player in the global market for grain analysis in 2023. Cereals, including wheat, corn, rice, barley, oats, and sorghum, are typically the dominant segment in the global grain analysis market. These grains are staple food crops consumed worldwide and form the foundation of many diets.

Cereals account for a significant portion of global grain production and consumption. They are used as primary ingredients in a wide range of food products, including bread, pasta, breakfast cereals, snacks, and animal feed. As a result, there's a high demand for grain analysis services to ensure the safety, quality, and nutritional value of cereals throughout the supply chain. The analysis of cereals involves a wide range of



parameters, including moisture content, protein content, starch content, gluten content, mycotoxin contamination, and pesticide residues. Technological advancements in analytical techniques such as near-infrared spectroscopy (NIR), chromatography, mass spectrometry, and DNA analysis have been particularly focused on improving the accuracy, speed, and sensitivity of cereal analysis methods. Cereals are subject to stringent regulatory requirements governing food safety, quality standards, and labeling regulations. Regulatory agencies establish maximum residue limits (MRLs) for pesticides and contaminants in cereals, requiring comprehensive grain analysis to ensure compliance and consumer protection. These factors are expected to drive the growth of this segment.

### Target Tested Insights

The Pathogen segment is projected to experience rapid growth during the forecast period. Pathogen analysis in grains is vital for ensuring food safety and averting foodborne disease outbreaks. Key pathogens include Salmonella, E. coli bacteria, and molds producing mycotoxins. The demand for pathogen testing is propelled by stringent food safety regulations, notably in North America and Europe, where authorities enforce rigorous standards for microbial contamination. Testing methods range from traditional culture-based approaches to advanced molecular techniques like PCR and NGS. With growing consumer awareness of foodborne risks, pathogen testing is integral to grain quality control and assurance initiatives. These factors collectively contribute to the growth of this segment.

### Regional Insights

North America emerged as the dominant player in the global grain analysis market in 2023, holding the largest market share in terms of value. North America commands a substantial portion of the global grain analysis market, propelled by rigorous food safety regulations overseen by entities like the FDA and CFIA. The region's robust infrastructure for food safety testing, including cutting-edge laboratories and skilled personnel, bolsters its market dominance. Adoption of advanced analytical techniques like PCR and NGS facilitates swift and precise detection of pathogens, pesticides, mycotoxins, and other contaminants in grains. Also, the prevalence of genetically modified crops in North America drives demand for GMO testing services, fostering innovation in GMO detection technologies. Heightened consumer awareness of food safety concerns and preferences for organic and non-GMO products further invigorate the market for grain analysis services in the region.

## Key Market Players

Bureau Veritas

Eurofins Scientific SE

ALS Limited

Intertek Group PLC

SGS Société Générale de Surveillance SA.

Thermo Fisher Scientific, Inc.

Neogen Corporation

Romer Labs Division Holding GmbH

Sciex

Waters Corporation

## Report Scope:

In this report, the Global Grain Analysis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Grain Analysis Market,By Grain Type:

- oCereals

- oOilseeds

- oPulses

### Grain Analysis Market,By Target Tested:

- oPathogens

oPesticides

oGMO

oMycotoxins

oOthers

Grain Analysis Market,By Technology:

oTraditional Technology

oRapid Technology

Grain Analysis Market,By End User:

oFood

oFeed

Grain Analysis Market,By Component:

oInstruments

oReagents Consumables

oReference Materials

Grain Analysis Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Grain Analysis Market.

### Available Customizations:

Global Grain Analysis market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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