

India Bioanalytical Testing Service Market By Molecule (Small Molecule, Large Molecule, Others), By Test (ADME, PK, PD, Bioavailability, Bioequivalence, Others), By Workflow (Sample Preparation, Sample Analysis, Others), By Application (Oncology, Neurology, Infectious Diseases, Gastroenterology, Cardiology, Other), By End Use (Pharma & BioPharma Companies, CDMO, CRO), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

The India Bioanalytical Testing Services Market was valued at USD 79.09 million in 2024 and is projected to reach USD 143.28 million by 2030, with a CAGR of 10.37% over the forecast period. The market is experiencing significant growth, largely driven by the increasing demand from the pharmaceutical and biotechnology sectors. This surge is due to the growing need for drug efficacy, safety, and regulatory compliance, which has led to a rise in the demand for bioanalytical testing services. Additionally, the outsourcing of these services to India, due to its cost-effectiveness and highly skilled workforce, has further contributed to market expansion. The increase in clinical trials and the tightening of regulatory requirements by organizations such as the CDSCO and WHO are also propelling the demand for bioanalytical testing. Technological advancements in mass spectrometry and chromatography are improving testing capabilities and attracting more companies to leverage these services.

However, the market faces challenges, including the complexity of testing biologics, which demands specialized equipment and expertise. The lengthy regulatory approval processes and high costs associated with establishing advanced testing facilities also

pose hurdles. Furthermore, the growing demand for skilled professionals to meet market needs may lead to talent shortages in the future. Despite these challenges, the India Bioanalytical Testing Services Market is poised for sustained growth, with the southern region emerging as a key player, benefiting from the concentration of pharmaceutical and biotech firms, strong government support, and established infrastructure.

Key Market Drivers

Increased Demand for Pharmaceutical and Biotech Research

India's pharmaceutical and biotechnology research sectors are expanding, fueled by global healthcare trends. The country is a hub for clinical trials, conducting approximately 60-70% of global trials, driven by its large, diverse population, which offers valuable data for research. Additionally, India is recognized for its expertise in managing Phase I-IV clinical trials, offering cost-effective services to international pharmaceutical companies.

India plays a pivotal role in the global pharmaceutical supply chain, being the largest exporter of generic drugs and supplying over 50% of global vaccine demand. The country also provides nearly 40% of the U.S.'s generic medicines. As a result, both local and international pharmaceutical companies are investing heavily in R&D activities, creating an increased need for advanced bioanalytical testing services to ensure the safety and efficacy of new drugs.

The Indian government is actively supporting the growth of the pharmaceutical and biotechnology sectors, offering tax incentives and funding for R&D through initiatives like 'Make in India' and the Biotechnology Industry Research Assistance Council (BIRAC). India's prominence in biotechnology, especially in vaccine development and personalized medicine, is further driving the demand for bioanalytical testing services to meet stringent regulatory standards.

Key Market Challenges

Skilled Workforce Shortage

A significant challenge facing the bioanalytical testing services market in India is the shortage of skilled professionals. As the demand for bioanalytical testing services rises alongside the pharmaceutical and biotechnology sectors, there is a growing gap in the

availability of professionals with specialized expertise in advanced testing methods and technologies. This skills gap can impact the quality, efficiency, and scalability of testing services, especially in a market that requires compliance with stringent global standards.

India's bioanalytical testing sector depends heavily on professionals with expertise in complex areas such as pharmacokinetics (PK), bioavailability, and bioequivalence. However, many testing facilities struggle to attract and retain talent proficient in using advanced technologies like mass spectrometry and liquid chromatography, as bioanalytical testing requires highly specialized academic and practical training.

Key Market Trends

Growth of the Contract Research Organization (CRO) Market in India

The Contract Research Organization (CRO) market in India is growing rapidly, driven by the increasing demand for clinical trials and the country's expanding capabilities in research and development. India has become a preferred destination for global pharmaceutical and biotech companies to outsource critical R&D services, driven by its cost-effective advantages and increasing sophistication in CRO capabilities.

One key trend contributing to this growth is the rising number of global pharmaceutical companies outsourcing clinical trials to India. India's regulatory environment, which aligns with international standards, ensures that clinical trials are conducted in compliance with global Good Clinical Practice (GCP) guidelines. Additionally, the adoption of digital tools, artificial intelligence (AI), and data analytics in clinical trials is improving operational efficiency, patient recruitment, data collection, and monitoring.

India's strengths in conducting complex trials, particularly in oncology, diabetes, cardiovascular diseases, and vaccines, have made it a hub for multinational pharmaceutical companies seeking to conduct large-scale, multi-phase clinical trials. The government's support through initiatives such as 'Make in India' and regulatory reforms that streamline approval processes are further boosting the CRO market. Furthermore, the growing demand for biosimilars and biologics is driving the need for specialized CRO services in these areas.

Key Market Players

Syneos Health Pvt Ltd

Intertek Group PLC

SGS SA

IQVIA Inc

Icon PLC

Labcorp Holdings Inc

Charles River Laboratories India Pvt. Ltd.

Report Scope

This report covers the India Bioanalytical Testing Services Market, segmented as follows:

By Molecule: Small Molecule, Large Molecule, Others

By Test: ADME, PK, PD, Bioavailability, Bioequivalence, Others

By Workflow: Sample Preparation, Sample Analysis, Others

By Application: Oncology, Neurology, Infectious Diseases, Gastroenterology, Cardiology, Other

By End Use: Pharma & BioPharma Companies, CDMO, CRO

By Region: East India, West India, North India, South India

Competitive Landscape

Detailed analysis of major players in the India Bioanalytical Testing Services Market.

Available Customizations:

TechSci Research offers customizations to the report to meet specific company needs, including additional market player profiling.

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

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