

# **Laboratory Proficiency Testing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Industry Type (Clinical Diagnostics, Microbiology, Pharmaceuticals, Biologics, Others), By Technology (Polymerase Chain Reaction, Immunoassays, Chromatography, Spectrometry, Other Technologies) Region and Competition**

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## **Abstracts**

Global Laboratory Proficiency Testing Market has valued at USD 1.09 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.85% through 2028. The Global Laboratory Proficiency Testing Market is a dynamic and rapidly evolving sector within the broader field of quality assurance and analytical testing. Proficiency testing, often referred to as interlaboratory comparison or external quality assessment, is a critical component of ensuring the accuracy and reliability of laboratory results across various industries, including healthcare, pharmaceuticals, food and beverages, environmental testing, and more. This market segment has been witnessing robust growth due to the increasing emphasis on product quality, safety, and regulatory compliance.

One of the key drivers for the expansion of this market is the stringent regulatory requirements across different domains. Regulatory bodies, such as the FDA in the pharmaceutical industry or ISO accreditation standards, mandate that laboratories participate in proficiency testing programs to maintain their certifications and licenses. As a result, laboratories and testing facilities around the world are actively seeking proficiency testing services to verify the accuracy and consistency of their analytical

processes.

Furthermore, globalization and international trade have contributed to the proliferation of proficiency testing programs. Businesses are increasingly sourcing products and services from various parts of the world, necessitating standardized and reliable testing methods. This, in turn, drives the demand for proficiency testing services to ensure consistency and compliance across borders.

The market is characterized by a diverse range of proficiency testing providers, each catering to specific industry verticals or testing domains. These providers offer a variety of proficiency testing schemes, covering parameters such as chemical composition, microbiology, physical properties, and more. Technology advancements have also played a crucial role in this market, with the adoption of digital platforms for result submission and data analysis, making participation in proficiency testing programs more convenient and accessible.

## Key Market Drivers

### Increasing Globalization and International Trade

Increasing globalization and international trade are key drivers that have significantly boosted the Global Laboratory Proficiency Testing Market. In our increasingly interconnected global economy, products and services flow across borders at an unprecedented pace. This globalization has led to a growing need for standardized and reliable testing methods to ensure that products meet consistent quality and safety standards, irrespective of their origin.

One of the most notable examples of this impact is in the food and beverage industry. Companies in this sector often source raw materials and ingredients from various parts of the world. Proficiency testing plays a critical role in guaranteeing that these ingredients meet the same safety and quality criteria, regardless of their geographical source. This is particularly vital in industries governed by international regulations and standards, such as the ISO 17025 accreditation for testing laboratories, which sets the bar for testing and calibration.

Moreover, with the rise of global supply chains, manufacturers, exporters, and importers need to ensure the quality and safety of their products at each stage of production and distribution. Proficiency testing provides a reliable mechanism to assess the accuracy and precision of analytical procedures, thereby minimizing the risks associated with

variations in testing practices across different regions.

Globalization and international trade have also heightened consumer expectations. Consumers are increasingly aware of the products they consume and demand transparency, safety, and quality assurance. They expect the goods they purchase to meet international standards and adhere to strict quality controls, irrespective of whether a product is manufactured locally or overseas. This consumer-driven demand for quality and safety has reinforced the importance of proficiency testing in various industries, making it a pivotal tool for businesses to ensure global compliance.

### Rising Demand for Customized Proficiency Testing

The Global Laboratory Proficiency Testing Market is experiencing significant growth driven by the rising demand for customized proficiency testing programs. Laboratories across various industries are increasingly seeking tailored proficiency testing schemes to align precisely with their unique testing processes and specific requirements. This customization has become a pivotal factor in enhancing the market's appeal.

Customized proficiency testing programs offer laboratories the flexibility to focus on the most critical parameters for their operations. For example, in the clinical diagnostics sector, where patient populations and testing volumes can vary significantly, laboratories may need to prioritize certain tests over others. Customized proficiency testing allows these laboratories to address their specific testing needs effectively, ensuring they maintain their expertise in their specialized areas while meeting rigorous regulatory requirements.

Furthermore, industries that specialize in niche areas or deal with complex and unique testing procedures benefit immensely from customized proficiency testing. These programs provide the opportunity to refine and hone their proficiency in precisely the parameters that are most relevant to their work, ultimately improving the quality and accuracy of their testing results.

Proficiency testing providers have responded to this growing demand by offering personalized programs that cater to the individual needs of laboratories. These tailored schemes can be designed to address specific methods, equipment, or even unique matrices that laboratories encounter in their daily operations. Customization allows laboratories to maintain their competitive edge, meet regulatory standards, and ensure their testing capabilities align seamlessly with their industry's requirements.

As laboratories recognize the advantages of customized proficiency testing, the market continues to expand. This trend is poised to persist as businesses in diverse sectors realize the importance of personalized proficiency testing in optimizing their testing procedures and meeting the growing expectations of regulatory bodies and consumers.

### Advancements in Technology

Advancements in technology are playing a pivotal role in boosting the Global Laboratory Proficiency Testing Market. The integration of innovative technologies into proficiency testing processes has ushered in a new era of efficiency, accuracy, and accessibility, making these programs more appealing and effective for laboratories across various industries.

One of the most significant technological advancements is the adoption of digital platforms and software solutions designed to streamline the entire proficiency testing process. Laboratories can now conveniently submit their test results, access real-time data analysis, and receive feedback through user-friendly online platforms. This digital transformation has not only simplified the participation process but has also significantly reduced the administrative burden on laboratories.

Automation and robotics have also made a substantial impact on proficiency testing. These technologies have enhanced the precision and efficiency of laboratory testing procedures. Automated sample handling, robotics-assisted testing, and state-of-the-art instrumentation have improved the consistency and reliability of test results. As a result, proficiency testing has become a more valuable tool for laboratories aiming to maintain the highest standards of accuracy and precision.

Furthermore, data analytics and artificial intelligence (AI) are being utilized to provide more comprehensive insights into proficiency testing performance. AI-driven algorithms can identify trends and patterns in test results, helping laboratories identify areas for improvement and make data-driven decisions. This level of data analysis goes beyond mere compliance, enabling laboratories to optimize their testing methods and enhance overall quality.

### Key Market Challenges

#### Complexity and Diversity of Testing

The Global Laboratory Proficiency Testing Market is facing a formidable challenge in

the form of the complexity and diversity of testing requirements across different industries. While proficiency testing is a vital component of quality assurance and regulatory compliance, it is hindered by the intricate and multifaceted nature of testing processes and the wide variety of parameters and matrices that laboratories encounter.

Laboratories work in a multitude of fields, from clinical diagnostics and pharmaceuticals to food and beverage, environmental analysis, and material science. Each sector has its own distinct set of testing requirements, necessitating tailored proficiency testing programs. For instance, a clinical laboratory measuring blood glucose levels faces vastly different challenges compared to a food testing facility checking for pathogens in food products. Proficiency testing providers must address this diversity by offering a range of programs that cater to the specific needs of each industry.

Furthermore, within each industry, there is significant variation in testing methods and matrices. For instance, in environmental testing, laboratories might be tasked with analyzing water, soil, or air samples, each of which requires different testing procedures. In pharmaceuticals, the testing methods for solid dosage forms differ significantly from those for liquid formulations or injectables. Proficiency testing providers must adapt to this intricate landscape by offering a spectrum of proficiency testing schemes that encompass various methods and matrices.

The evolving nature of regulations and standards adds another layer of complexity to proficiency testing. Regulatory bodies in different countries and regions often establish their own unique requirements and expectations. Laboratories that operate on a global scale must navigate a web of varying compliance standards, necessitating participation in multiple proficiency testing programs to meet these diverse regulatory demands.

### Cost Constraints

The Global Laboratory Proficiency Testing Market plays a pivotal role in maintaining quality and safety standards across various industries. However, a significant challenge that hinders its growth and effectiveness is the cost associated with participating in proficiency testing programs. Laboratories, both large and small, encounter financial barriers that can limit their engagement in these essential quality assurance processes.

One of the primary financial challenges is the participation fees associated with proficiency testing programs. Laboratories are typically required to pay fees for program enrollment, sample procurement, and administrative overhead. These costs can add up, especially for smaller laboratories or those in emerging economies with limited budgets.

For many, these fees present a considerable financial burden.

Beyond participation fees, there are often additional costs involved in meeting the standards required by proficiency testing programs. Laboratories may need to invest in new equipment, maintain it, or upgrade their existing technology to ensure they can meet the specified proficiency testing criteria. Furthermore, personnel training may be necessary, including costs for staff development and specialized training courses.

This financial strain can be particularly detrimental for smaller laboratories or those operating in resource-constrained settings. The limited resources available to these entities can impede their participation in proficiency testing programs, jeopardizing the overall quality of their testing processes. Consequently, there is a risk of disparities in the quality of testing services provided by laboratories in different financial positions.

## Key Market Trends

### Rising Regulatory Stringency

Rising regulatory stringency is a significant driver that has boosted the Global Laboratory Proficiency Testing Market. Regulatory bodies across various industries, such as pharmaceuticals, healthcare, and food safety, are continually raising the bar for quality and safety standards. In response to these increasingly stringent regulations, laboratories are compelled to participate in proficiency testing programs as a means of demonstrating the accuracy and consistency of their testing processes.

In the pharmaceutical sector, for instance, adherence to Good Manufacturing Practices (GMP) and Good Laboratory Practices (GLP) is mandatory. These stringent regulations require laboratories to undergo proficiency testing to maintain certifications and licenses. The demand for proficiency testing services has surged in this industry as pharmaceutical companies worldwide seek to ensure that their analytical processes are in compliance with these rigorous standards.

Likewise, in healthcare, clinical laboratories are under intense scrutiny to provide accurate diagnostic results. Proficiency testing is a vital tool for maintaining the highest standards of precision, minimizing the risk of misdiagnosis or erroneous medical results, and ensuring patient safety. The rising regulatory expectations in healthcare have been a key driver in the adoption of proficiency testing programs.

In the food and beverage industry, the proliferation of stringent food safety regulations

and standards, such as the Hazard Analysis and Critical Control Points (HACCP) and the Food Safety Modernization Act (FSMA), has driven laboratories to actively participate in proficiency testing. This is particularly important in an industry where the quality and safety of products are of utmost importance.

### Rising Consumer Focus on Quality and Safety

The Global Laboratory Proficiency Testing Market has been significantly boosted by the rising consumer focus on quality and safety in products and services. Consumers today are more discerning and vigilant about the quality, safety, and reliability of the goods and services they use and consume. This increased scrutiny has compelled businesses and laboratories to prioritize accuracy, quality, and regulatory compliance, driving a greater demand for proficiency testing services.

In healthcare, patients demand accuracy and precision in diagnostic tests and clinical laboratory procedures. Proficiency testing ensures that laboratories consistently deliver high-quality and safe healthcare services by maintaining the highest standards of precision. This focus on quality and safety aligns with the consumer's paramount concern for their well-being, reducing the risk of misdiagnosis and erroneous medical results.

The food and beverage industry is another sector where consumer focus on quality and safety is acutely apparent. Consumers expect products to meet stringent safety and quality criteria, regardless of their source. This has led to an increased reliance on proficiency testing to guarantee that food products adhere to the highest safety and quality standards. It plays a critical role in ensuring that products are free from contaminants, pathogens, and adhere to labeling and nutritional information.

Additionally, consumers' growing demand for transparency and quality has also influenced industries such as pharmaceuticals. They are increasingly relying on proficiency testing to maintain the highest quality standards for medications and drug formulations, reinforcing consumer trust and confidence in the safety and efficacy of pharmaceutical products.

### Segmental Insights

#### Industry Type Insights

Based on the Industry Type, Clinical Diagnostics emerged as the dominant segment in

the global market for Global Laboratory Proficiency Testing Market in 2022. Critical Importance of Accurate Results: Clinical diagnostics plays a pivotal role in patient care and healthcare decision-making. Diagnostic tests are fundamental for disease diagnosis, monitoring patient health, and guiding treatment decisions. Inaccurate results can have severe consequences for patient well-being. As such, there is an uncompromising need for precise and reliable diagnostic testing, driving the demand for proficiency testing in this industry.

Clinical diagnostic laboratories are subject to rigorous regulatory standards and quality control requirements, including Good Laboratory Practices (GLP) and Clinical Laboratory Improvement Amendments (CLIA) in the United States. Proficiency testing is a fundamental element in meeting these standards and maintaining accreditation and licensure, underlining its critical role in ensuring the quality and safety of clinical laboratory operations.

### Route Of Administration Insights

Based on the Technology, the Polymerase Chain Reaction segment emerged as the dominant player in the global market for Global Laboratory Proficiency Testing Market in 2022. PCR is a fundamental technology in clinical diagnostics for detecting and quantifying nucleic acids, including DNA and RNA. It is a cornerstone of molecular diagnostics, used for identifying infectious agents, genetic mutations, and other biomarkers associated with various diseases. As clinical diagnostics is a primary user of proficiency testing services, the high demand for PCR proficiency testing arises from its widespread use in this field. PCR technology finds applications beyond clinical diagnostics, including research, food safety, environmental testing, and forensics. Proficiency testing is essential in these areas as well, ensuring the accuracy of results, data comparability, and overall quality control. The broad range of applications of PCR contributes to its high demand in proficiency testing.

### Regional Insights

North America emerged as the dominant player in the global Laboratory Proficiency Testing Market in 2022, holding the largest market share. North America boasts one of the most comprehensive and stringent regulatory frameworks, particularly in industries like healthcare, pharmaceuticals, and food safety. The rigorous quality and safety standards imposed by regulatory bodies, including the Food and Drug Administration (FDA) and the Centers for Medicare & Medicaid Services (CMS), have driven the demand for proficiency testing services. Laboratories in North America must adhere to



these standards, making proficiency testing an integral part of their quality assurance and compliance efforts. The healthcare sector in North America is a major consumer of proficiency testing services, with clinical diagnostics laboratories being a primary driver. The United States, in particular, has a large network of clinical laboratories serving a vast patient population. The accuracy of diagnostic tests is critical for patient safety, and proficiency testing is pivotal in ensuring the precision and reliability of these tests..

### Key Market Players

Bio-Rad Laboratories, Inc.

FAPAS (A Division of Fera Science Limited)

LGC Limited

Merck KGaA

NSI Lab Solutions

QACS Ltd

Trilogy Analytical Laboratory

Waters Corporation

BIPEA

Absolute Standards, Inc.

### Report Scope:

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

Global Laboratory Proficiency Testing Market, By Industry Type:

Clinical Diagnostics

Microbiology

Pharmaceuticals

Biologics

Others

Global Laboratory Proficiency Testing Market, By Technology:

Polymerase Chain Reaction

Immunoassays

Chromatography

Spectrometry

Other Technologies

Global Laboratory Proficiency Testing Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Laboratory Proficiency Testing Market.

Available Customizations:

Global Laboratory Proficiency Testing 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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