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Mycotoxin Testing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Aflatoxin, Deoxynivalenol, Ochratoxins, Fumonisins, Others), By Technology (HPLC-based, LC-MS/MS-based, Immunoassay-based, Others), By Sample (Food, Feed), By End User (Research Lab, Research Institutes, Food Testing Industries, Feed Testing Industries, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Mycotoxin Testing Market is projected to expand from USD 14.46 Billion in 2025 to USD 22.39 Billion by 2031, reflecting a compound annual growth rate of 7.56%. Mycotoxin testing involves the analytical protocols used to identify and measure toxic secondary metabolites generated by fungi in agricultural crops and processed foods. The market is primarily driven by the implementation of rigorous international food safety standards and the increasing volume of global trade, which mandates strict adherence to maximum residue limits. Furthermore, the rising frequency of fungal contamination caused by unstable climate conditions acts as a key catalyst for the adoption of routine testing measures.

Despite strong demand, the substantial capital required for advanced chromatographic equipment and the complexity of sample preparation pose major hurdles to market growth in developing regions. Accurate data remains essential for effective risk management strategies. As noted in the Alert and Cooperation Network 2023 Annual Report released in 2024, mycotoxins continued to be a significant safety concern, ranking as the third most reported hazard category with 401 notifications documented

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across the European network.

Market Driver

The intensifying impact of climate change on crop vulnerability to mold serves as a primary driver for the Global Mycotoxin Testing Market. Extreme weather patterns, ranging from prolonged droughts to excessive rainfall, create ideal conditions for fungal proliferation in agricultural commodities, necessitating more frequent and comprehensive analysis. As supply chains face elevated contamination risks, the industry relies on data to forecast and manage these biological hazards. According to the 'World Mycotoxin Survey' by dsm-firmenich in March 2025, the prevalence of all six major mycotoxins increased compared to the previous year, with risk levels classified as extreme in regions such as North America and South Asia, compelling producers to adopt strict screening to ensure raw materials remain safe for processing.

The rising demand for high-quality animal feed and the critical need to mitigate economic losses from post-harvest contamination further stimulate market adoption. Mycotoxin co-occurrence?where multiple toxins exist simultaneously?poses severe health risks to livestock, driving the shift toward advanced multi-toxin detection methods to preserve herd productivity. Findings from the 'World Mycotoxin Report' presented by Cargill at the World Mycotoxin Forum in March 2025 highlight that co-occurrence remains a major challenge, with 78% of tested feed samples containing three or more mycotoxins. This operational necessity drives significant financial performance for testing providers; according to Neogen Corporation in 2025, the Food Safety segment contributed 71.3% of the company's total annual revenues, underscoring the sector's robust commercial expansion.

Market Challenge

The substantial capital investment required for sophisticated chromatographic instruments constitutes a significant structural impediment to the broader expansion of the global mycotoxin testing market. State-of-the-art detection systems, such as liquid chromatography-mass spectrometry, are essential for achieving the sensitivity needed to identify trace contamination levels. However, the high procurement and operational costs associated with this technology create a steep entry barrier for small-scale laboratories and food processors, particularly in developing economies. This financial burden restricts the adoption of automated testing protocols to well-funded organizations in industrialized nations, effectively stifling demand in emerging markets where the risk of fungal contamination is often highest.

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Additionally, the complexity of sample preparation demands specialized infrastructure and highly skilled personnel, which adds to the operational expenditure. This technical exclusivity prevents smaller agricultural entities from implementing routine internal testing, forcing them to rely on third-party services or forgo testing entirely. The necessity for such rigorous, high-cost testing is evident in trade compliance data. According to the U.S. Grains Council's 2024 Corn Harvest Quality Report, 98.9% of tested samples met strict federal action levels for aflatoxin. Verifying compliance at such precise thresholds requires sophisticated instrumentation that remains financially inaccessible to many market participants, thereby capping the total addressable market for testing solutions.

Market Trends

The increased surveillance of emerging and masked mycotoxins is fundamentally reshaping analytical strategies within the market. Regulatory bodies and industry players are expanding testing panels beyond traditional regulated compounds to detect modified forms and lesser-known fungal metabolites that standard screening often misses. This shift is driven by the need to understand the full toxicological burden of feed and food matrices, particularly as non-regulated toxins become more prevalent. According to the '2024 Harvest Survey' by Patent Co in February 2025, 100% of corn samples analyzed from multiple European nations were contaminated with more than one mycotoxin type, with emerging toxins such as beauvericin identified as primary contaminants alongside regulated compounds.

Concurrently, the digitalization of testing data and traceability is emerging as a critical trend to manage the complexity of supply chain safety. Laboratories and food processors are increasingly integrating artificial intelligence and cloud-based platforms to aggregate testing results, predict contamination risks, and ensure real-time regulatory compliance. This technological transition moves the industry from reactive testing to proactive risk intelligence, allowing for faster decision-making during outbreaks. According to SGS in its 'Digicomply' risk intelligence insights from February 2025, mycotoxins persisted as one of the top three reported food safety hazards globally over the preceding 24 months, underscoring the reliance on digital tools to monitor these biological threats.

Key Market Players

SGS Societe Generale de Surveillance SA.

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Bureau Veritas

Eurofins Scientific

Intertek Group plc

Merieux NutriSciences Corporation

ALS Limited

Neogen Corporation

AsureQuality Limited.

Charm Sciences, Inc.

Premier Analytical Services

Report Scope

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

Mycotoxin Testing Market, By Type

Aflatoxin

Deoxynivalenol

Ochratoxins

Fumonisins

Others

Mycotoxin Testing Market, By Technology

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HPLC-based

LC-MS/MS-based

Immunoassay-based

Others

Mycotoxin Testing Market, By Sample

Food

Feed

Mycotoxin Testing Market, By End User

Research Lab

Research Institutes

Food Testing Industries

Feed Testing Industries

Others

Mycotoxin Testing Market, By Region

North America

United States

Canada

Mexico

Europe

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- 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

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Competitive Landscape

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

Available Customizations:

Global Mycotoxin Testing Market report with the given market data, TechSci 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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