

South & Central America Occupational Health Market Forecast to 2030 - Regional Analysis - by Offering (Product, Solution, and Service), Category (Safety, Chemicals, Biological, Physical & Environmental, Ergonomics, Vaccination & immunizations, and Others), Employee Type (Remote, Hybrid, and Physical Presence), Site Location (On-Site, Off-Site, and Shared-Site), Type (Physical Wellbeing and Social & Mental Wellbeing), and Industry [Automobile, Chemical, Engineering, Government (including Federal), Manufacturing, Mining, Oil & Gas, Pharmaceutical, Ports, and Others]

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Abstracts

The South & Central America occupational health market is expected to grow from US\$ 180.34 million in 2022 to US\$ 244.27 million by 2030. It is estimated to grow at a CAGR of 3.9% from 2022 to 2030.

Increased Awareness of Occupational Hazards and Empowerment of Workers to Help Manage Health Risks Fuels South & Central America Occupational Health Market

According to BMC Public Health in 2021, there has been considerable reduction in the incidence of work-related accidents/ill-health across Brazil owing to increased awareness and steps taken by government organizations. For instance, occupational hazard reductions were found associated with the musculoskeletal system and

connective tissue and diseases of the nervous system. The highest reduction after the introduction of the Accident Prevention Factor was in manufacturing and production sectors in Brazil. As of November 2022, the organizations must register the Specialised Services in Occupational Health and Safety (SESMT) with the Brazilian Ministry of Labor and Social Security. Also, as of January 2023, the SESMTs in operation must be resized according to the new standard, and the registration must be completed. Before performing the procedure, the user must be linked to the CNPJ of the respective organization, according to the guidelines. Such revised policies are likely to create opportunities for the overall country. Risk based occupational safety and health (OSH) management contributes to women's empowerment and gender equality that benefits both business organizations and workers. Also, via effective social dialogue workers, government, and employers actively participate in OSH decision making processes and laws. Such factors might help to propel the market growth of overall South & Central America region during the forecast period.

South & Central America Occupational Health Market Overview

The South & Central America occupational health market is segmented into Brazil, Argentina, and the Rest of South & Central America. The market is likely to propel during the forecast period owing to the growing advancements in occupational infrastructure that directly impacts the economy of Brazil to a large extent. The cost-saving advantages and improved work efficiencies are also cited as major factors for occupational health service providers to establish bases in South & Central America.

In Brazil, workplace accidents are significantly underreported. Approximately half of the workers and firms are informal and are not registered with the government for social security benefits, and even fewer are eligible for compensation for injuries. Only formal employers are eligible to report workplace accidents to the social security system. Thus, the government of Brazil is actively working on improving public policies and social practices. For instance, Health and Safety at Work Act in Brazil reflects an impressive collaboration among ministries and experts to reflect on safety and health problems and to map out strategies to address them. With the new government surveillance plans, there was an overall reduction in the incidence of work-related accidents/ill health in a study published in 2021 by BMC Public Health. The biggest reduction in the incidence of work-related accidents/ill health was found in manufacturing and production companies. Also, the registration of specialized services for health and safety at work has become mandatory according to the published MTP regulation No. 2318 as of August 3, 2022, and the organizations must register the Specialized Services in Occupational Health and Safety (SESMT) at the Brazilian Ministry of Labor and Social

Register Security. Furthermore, the Brazilian government implemented eSocial to manage and monitor business processes related to payroll, taxes, employee and employer data, and health and safety issues on a single platform. Therefore, the above-mentioned factors indicate the continuous efforts by the Brazilian government to improve the occupational health services, which is expected to boost the market growth gradually in the coming years.

Argentina has a vital role to play in the occupational health field. With the growing labor force participation rate of ~47.60% in the fourth quarter of 2022, according to Trading Economics, the country is further expected to witness development in the private and public sectors. In 2021, according to The International Labour Organization, the employment-population ratio of 55.1% indicated that half of the population in Argentina is working, and hence needs occupational health services. Argentina is further strengthening its human resources with highly skilled professionals across all the industries. Moreover, Argentina offers high-quality health services and was the first country in South America to formally adopt the ILO guidelines on occupational safety and health management. Thus, the country is expected to provide significant growth opportunities for the South & Central America occupational health market.

A few of the major countries contributing to the South & Central America occupational health market growth in the Rest of South & Central America include Chile, Colombia, Peru, Cuba, Venezuela, and Bolivia. These countries offer significant growth opportunities for the market growth owing to the ongoing developments in the countries. These countries are improving their occupational infrastructure, thereby allowing new market players to enter into business, which is expected to increase the demand for occupational health in the coming years. In addition, many countries in the region are investing and taking interest in improving the occupational health services by focusing on preventive and advanced care for the employees. Thus, the South & Central America occupational health market is expected to experience significant growth opportunities in the Rest of South & Central America.

South & Central America Occupational Health Market Revenue and Forecast to 2030
(US\$ Million)

South & Central America Occupational Health Market Segmentation

The South & Central America occupational health market is segmented into offerings, category, employee type, site location, type, industry, and country.

Based on offerings, the South & Central America occupational health market is segmented into products, solutions, and services. The services segment held the largest share of the South & Central America occupational health market in 2022.

Based on category, the South & Central America occupational health market is segmented into safety, chemicals, biological, physical & environment, ergonomic, vaccination & immunizations, and others. The physical & environment segment held the largest share of the South & Central America occupational health market in 2022.

Based on employee type, the South & Central America occupational health market is segmented into remote, hybrid, and physical presence. The remote segment held the largest share of the South & Central America occupational health market in 2022.

Based on site location, the South & Central America occupational health market is segmented into on-site, off-site, and shared-site. The off-site segment held the largest share of the South & Central America occupational health market in 2022.

Based on type, the South & Central America occupational health market is segmented into physical wellbeing and social & mental wellbeing. The physical wellbeing segment held a larger share of the South & Central America occupational health market in 2022.

Based on industry, the South & Central America occupational health market is segmented into automobile, chemical, engineering, government (including federal), manufacturing, mining, oil & gas, pharmaceutical, ports, others. The government segment held the largest share of the South & Central America occupational health market in 2022.

Based on country, the South & Central America occupational health market is segmented into Brazil, Argentina, and the Rest of South & Central America. The Rest of South & Central America dominated the South & Central America occupational health market in 2022.

Axa SA, Nexo CS, SGS Soci?t? G?n?rale de Surveillance SA, and UL Solutions Inc are some of the leading companies operating in the South & Central America occupational health market.

Contents

1. INTRODUCTION

1.1 Scope of the Study

1.2 The Insight Partners Research Report Guidance

1.3 Market Segmentation

1.3.1 South & Central America Occupational Health Market – By Offerings

1.3.2 South & Central America Occupational Health Market – By Category

1.3.3 South & Central America Occupational Health Market – By Employee Type

1.3.4 South & Central America Occupational Health Market – By Site Location

1.3.5 South & Central America Occupational Health Market – By Type

1.3.6 South & Central America Occupational Health Market – By Industry

1.3.7 South & Central America Occupational Health Market – By Country

2. KEY TAKEAWAYS

3. RESEARCH METHODOLOGY

3.1 Coverage

3.2 Secondary Research

3.3 Primary Research

4. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – MARKET LANDSCAPE

4.1 Overview

4.2 PEST Analysis

4.2.1 South And Central America PEST Analysis

4.3 Experts Opinion

5. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – KEY MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Government Initiatives to Promote Occupational Health

5.1.2 Upsurge in Adoption of Workplace Wellness Programs

5.2 Key Restraints

5.2.1 Health-Associated Risks at Workplaces

5.3 Opportunities

5.3.1 Increased awareness of occupational hazards and empowerment of workers to help manage health risks

5.4 Future Trends

5.4.1 Incorporation of Robotics for Enhancing Occupational Health Market In The Forecast Period

5.5 Impact Analysis

6. OCCUPATIONAL HEALTH MARKET – SOUTH & CENTRAL AMERICA ANALYSIS

6.1 South & Central America Occupational Health Market Revenue Forecast and Analysis

7. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY OFFERINGS

7.1 Overview

7.2 South & Central America Occupational Health Market Revenue Share, by Offerings 2022 & 2030 (%)

7.3 Products

7.3.1 Overview

7.3.2 Products: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Solutions

7.4.1 Overview

7.4.2 Solutions: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

7.5 Services

7.5.1 Overview

7.5.2 Services: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY CATEGORY

8.1 Overview

8.2 South & Central America Occupational Health Market Revenue Share, by Category

2022 & 2030 (%)

8.3 Safety

8.3.1 Overview

8.3.2 Safety: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Chemicals

8.4.1 Overview

8.4.2 Chemicals: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.5 Biological

8.5.1 Overview

8.5.2 Biological: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.6 Physical and Environment

8.6.1 Overview

8.6.2 Physical and Environment: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.7 Ergonomic

8.7.1 Overview

8.7.2 Ergonomic: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.8 Vaccination and Immunizations

8.8.1 Overview

8.8.2 Vaccination and Immunizations: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

8.9 Others

8.9.1 Overview

8.9.2 Others: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

9. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY EMPLOYEE TYPE

9.1 Overview

9.2 South & Central America Occupational Health Market Revenue Share, by Employee Type 2022 & 2030 (%)

9.3 Remote

9.3.1 Overview

9.3.2 Remote: South & Central America Occupational Health Market – Revenue and

Forecast to 2030 (US\$ Million)

9.4 Hybrid

9.4.1 Overview

9.4.2 Hybrid: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Physical Presence

9.5.1 Overview

9.5.2 Physical Presence: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

10. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY SITE LOCATION

10.1 Overview

10.2 South & Central America Occupational Health Market Revenue Share, by Site Location 2022 & 2030 (%)

10.3 On-Site

10.3.1 Overview

10.3.2 On-Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

10.4 Off-Site

10.4.1 Overview

10.4.2 Off-Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

10.5 Shared Site

10.5.1 Overview

10.5.2 Shared Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

11. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY TYPE

11.1 Overview

11.2 South & Central America Occupational Health Market Revenue Share, by Type 2022 & 2030 (%)

11.3 Physical Wellbeing

11.3.1 Overview

11.3.2 Physical Wellbeing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

11.4 Social And Mental Wellbeing

11.4.1 Overview

11.4.2 Social And Mental Wellbeing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – BY INDUSTRY

12.1 Overview

12.2 South & Central America Occupational Health Market Revenue Share, by Industry 2022 & 2030 (%)

12.3 Automobile

12.3.1 Overview

12.3.2 Automobile: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.4 Chemical

12.4.1 Overview

12.4.2 Chemical: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.5 Engineering

12.5.1 Overview

12.5.2 Engineering: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.6 Government

12.6.1 Overview

12.6.2 Government: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.7 Manufacturing

12.7.1 Overview

12.7.2 Manufacturing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.8 Mining

12.8.1 Overview

12.8.2 Mining: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.9 Oil and Gas

12.9.1 Overview

12.9.2 Oil and Gas: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.10 Pharmaceutical

12.10.1 Overview

12.10.2 Pharmaceutical: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.11 Ports

12.11.1 Overview

12.11.2 Ports: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

12.12 Others

12.12.1 Overview

12.12.2 Others: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

13. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET – REVENUE AND FORECAST TO 2030 – COUNTRY ANALYSIS

13.1 South & Central America Occupational Health Market

13.1.1 Overview

13.1.2 South & Central America Occupational Health Market Share by Country – 2022 & 2030, (%)

13.1.2.1 Brazil: South & Central America Occupational Health Market- Revenue and Forecasts To 2030 (USD Million)

13.1.2.1.1 Brazil: South & Central America Occupational Health Market, By Offerings, 2020–2030 (USD Million)

13.1.2.1.1.1 Brazil: South & Central America Occupational Health Market, By Services, 2020–2030 (USD Million)

13.1.2.1.2 Brazil: South & Central America Occupational Health Market, By Category, 2020–2030 (USD Million)

13.1.2.1.2.1 Brazil: South & Central America Occupational Health Market, By Physical and Environment, 2020–2030 (USD Million)

13.1.2.1.2.2 Brazil: South & Central America Occupational Health Market, By Chemicals, 2020–2030 (USD Million)

13.1.2.1.2.3 Brazil: South & Central America Occupational Health Market, By Vaccination and Immunization, 2020–2030 (USD Million)

13.1.2.1.2.4 Brazil: South & Central America Occupational Health Market, By Ergonomic, 2020–2030 (USD Million)

13.1.2.1.2.5 Brazil: South & Central America Occupational Health Market, By Safety, 2020–2030 (USD Million)

13.1.2.1.2.6 Brazil: South & Central America Occupational Health Market, By

Biological, 2020–2030 (USD Million)

13.1.2.1.3 Brazil: South & Central America Occupational Health Market, By Employee Type, 2020–2030 (USD Million)

13.1.2.1.4 Brazil: South & Central America Occupational Health Market, By Site Location, 2020–2030 (USD Million)

13.1.2.1.5 Brazil: South & Central America Occupational Health Market, By Type, 2020–2030 (USD Million)

13.1.2.1.6 Brazil: South & Central America Occupational Health Market, By Industry, 2020–2030 (USD Million)

13.1.2.2 Argentina: South & Central America Occupational Health Market- Revenue and Forecasts To 2028 (USD Million)

13.1.2.2.1 Argentina: South & Central America Occupational Health Market, By Offerings, 2020–2030 (USD Million)

13.1.2.2.1.1 Argentina: South & Central America Occupational Health Market, By Services, 2020–2030 (USD Million)

13.1.2.2.2 Argentina: South & Central America Occupational Health Market, By Category, 2020–2030 (USD Million)

13.1.2.2.2.1 Argentina: South & Central America Occupational Health Market, By Physical and Environment, 2020–2030 (USD Million)

13.1.2.2.2.2 Argentina: South & Central America Occupational Health Market, By Chemicals, 2020–2030 (USD Million)

13.1.2.2.2.3 Argentina: South & Central America Occupational Health Market, By Vaccination and Immunization, 2020–2030 (USD Million)

13.1.2.2.2.4 Argentina: South & Central America Occupational Health Market, By Ergonomic, 2020–2030 (USD Million)

13.1.2.2.2.5 Argentina: South & Central America Occupational Health Market, By Safety, 2020–2030 (USD Million)

13.1.2.2.2.6 Argentina: South & Central America Occupational Health Market, By Biological, 2020–2030 (USD Million)

13.1.2.2.3 Argentina: South & Central America Occupational Health Market, By Employee Type, 2020–2030 (USD Million)

13.1.2.2.4 Argentina: South & Central America Occupational Health Market, By Site Location, 2020–2030 (USD Million)

13.1.2.2.5 Argentina: South & Central America Occupational Health Market, By Type, 2020–2030 (USD Million)

13.1.2.2.6 Argentina: South & Central America Occupational Health Market, By Industry, 2020–2030 (USD Million)

13.1.2.3 Rest of South & Central America: South & Central America Occupational Health Market - Revenue and Forecast to 2030 (USD Million)

13.1.2.3.1 Rest of South & Central America: South & Central America Occupational Health Market, By Offerings, 2020–2030 (USD Million)

13.1.2.3.1.1 Rest of South & Central America: South & Central America Occupational Health Market, By Services, 2020–2030 (USD Million)

13.1.2.3.2 Rest of South & Central America: South & Central America Occupational Health Market, By Category, 2020–2030 (USD Million)

13.1.2.3.2.1 Rest of South & Central America: South & Central America Occupational Health Market, By Physical and Environment, 2020–2030 (USD Million)

13.1.2.3.2.2 Rest of South & Central America: South & Central America Occupational Health Market, By Chemicals, 2020–2030 (USD Million)

13.1.2.3.2.3 Rest of South & Central America: South & Central America Occupational Health Market, By Vaccination and Immunization, 2020–2030 (USD Million)

13.1.2.3.2.4 Rest of South & Central America: South & Central America Occupational Health Market, By Ergonomic, 2020–2030 (USD Million)

13.1.2.3.2.5 Rest of South & Central America: South & Central America Occupational Health Market, By Safety, 2020–2030 (USD Million)

13.1.2.3.2.6 Rest of South & Central America: South & Central America Occupational Health Market, By Biological, 2020–2030 (USD Million)

13.1.2.3.3 Rest of South & Central America: South & Central America Occupational Health Market, By Employee Type, 2020–2030 (USD Million)

13.1.2.3.4 Rest of South & Central America: South & Central America Occupational Health Market, By Site Location, 2020–2030 (USD Million)

13.1.2.3.5 Rest of South & Central America: South & Central America Occupational Health Market, By Type, 2020–2030 (USD Million)

13.1.2.3.6 Rest of South & Central America: South & Central America Occupational Health Market, By Industry, 2020–2030 (USD Million)

14. SOUTH & CENTRAL AMERICA OCCUPATIONAL HEALTH MARKET–INDUSTRY LANDSCAPE

14.1 Overview

14.2 Growth Strategies in the Occupational Health Market (%)

14.3 Organic Developments

14.3.1 Overview

14.4 Inorganic Developments

14.4.1 Overview

15. COMPANY PROFILES

15.1 Axa SA

- 15.1.1 Key Facts
- 15.1.2 Business Description
- 15.1.3 Products and Services
- 15.1.4 Financial Overview
- 15.1.5 SWOT Analysis
- 15.1.6 Key Developments

15.2 UL Solutions Inc

- 15.2.1 Key Facts
- 15.2.2 Business Description
- 15.2.3 Products and Services
- 15.2.4 Financial Overview
- 15.2.5 SWOT Analysis
- 15.2.6 Key Developments

15.3 SGS SA

- 15.3.1 Key Facts
- 15.3.2 Business Description
- 15.3.3 Products and Services
- 15.3.4 Financial Overview
- 15.3.5 SWOT Analysis
- 15.3.6 Key Developments

15.4 Nexo CS Informatica SA

- 15.4.1 Business Description
- 15.4.2 Products and Services
- 15.4.3 Financial Overview
- 15.4.4 SWOT Analysis
- 15.4.5 Key Developments

16. APPENDIX

16.1 About The Insight Partners

16.2 Glossary of Terms

List Of Tables

LIST OF TABLES

Table 1. Brazil: South & Central America Occupational Health Market, By Offerings – Revenue and Forecast to 2030 (USD Million)

Table 2. Brazil: South & Central America Occupational Health Market, By Services – Revenue and Forecast to 2030 (USD Million)

Table 3. Brazil: South & Central America Occupational Health Market, By Category – Revenue and Forecast to 2030 (USD Million)

Table 4. Brazil: South & Central America Occupational Health Market, By Physical and Environment – Revenue and Forecast to 2030 (USD Million)

Table 5. Brazil: South & Central America Occupational Health Market, By Chemicals – Revenue and Forecast to 2030 (USD Million)

Table 6. Brazil: South & Central America Occupational Health Market, By Vaccination and Immunization – Revenue and Forecast to 2030 (USD Million)

Table 7. Brazil: South & Central America Occupational Health Market, By Ergonomic – Revenue and Forecast to 2030 (USD Million)

Table 8. Brazil: South & Central America Occupational Health Market, By Safety – Revenue and Forecast to 2030 (USD Million)

Table 9. Brazil: South & Central America Occupational Health Market, By Biological – Revenue and Forecast to 2030 (USD Million)

Table 10. Brazil: South & Central America Occupational Health Market, By Employee Type – Revenue and Forecast to 2030 (USD Million)

Table 11. Brazil: South & Central America Occupational Health Market, By Site Location – Revenue and Forecast to 2030 (USD Million)

Table 12. Brazil: South & Central America Occupational Health Market, By Type – Revenue and Forecast to 2030 (USD Million)

Table 13. Brazil: South & Central America Occupational Health Market, By Industry – Revenue and Forecast to 2030 (USD Million)

Table 14. Argentina: South & Central America Occupational Health Market, By Offerings – Revenue and Forecast to 2030 (USD Million)

Table 15. Argentina: South & Central America Occupational Health Market, By Services – Revenue and Forecast to 2030 (USD Million)

Table 16. Argentina: South & Central America Occupational Health Market, By Category – Revenue and Forecast to 2030 (USD Million)

Table 17. Argentina: South & Central America Occupational Health Market, By Physical and Environment – Revenue and Forecast to 2030 (USD Million)

Table 18. Argentina: South & Central America Occupational Health Market, By

Chemicals – Revenue and Forecast to 2030 (USD Million)

Table 19. Argentina: South & Central America Occupational Health Market, By Vaccination and Immunization – Revenue and Forecast to 2030 (USD Million)

Table 20. Argentina: South & Central America Occupational Health Market, By Ergonomic – Revenue and Forecast to 2030 (USD Million)

Table 21. Argentina: South & Central America Occupational Health Market, By Safety – Revenue and Forecast to 2030 (USD Million)

Table 22. Argentina: South & Central America Occupational Health Market, By Biological – Revenue and Forecast to 2030 (USD Million)

Table 23. Argentina: South & Central America Occupational Health Market, By Employee Type – Revenue and Forecast to 2030 (USD Million)

Table 24. Argentina: South & Central America Occupational Health Market, By Site Location – Revenue and Forecast to 2030 (USD Million)

Table 25. Argentina: South & Central America Occupational Health Market, By Type – Revenue and Forecast to 2030 (USD Million)

Table 26. Argentina: South & Central America Occupational Health Market, By Industry – Revenue and Forecast to 2030 (USD Million)

Table 27. Rest of South & Central America: South & Central America Occupational Health Market, By Offerings – Revenue and Forecast to 2030 (USD Million)

Table 28. Rest of South & Central America: South & Central America Occupational Health Market, By Services – Revenue and Forecast to 2030 (USD Million)

Table 29. Rest of South & Central America: South & Central America Occupational Health Market, By Category – Revenue and Forecast to 2030 (USD Million)

Table 30. Rest of South & Central America: South & Central America Occupational Health Market, By Physical and Environment – Revenue and Forecast to 2030 (USD Million)

Table 31. Rest of South & Central America: South & Central America Occupational Health Market, By Chemicals – Revenue and Forecast to 2030 (USD Million)

Table 32. Rest of South & Central America: South & Central America Occupational Health Market, By Vaccination and Immunization – Revenue and Forecast to 2030 (USD Million)

Table 33. Rest of South & Central America: South & Central America Occupational Health Market, By Ergonomic – Revenue and Forecast to 2030 (USD Million)

Table 34. Rest of South & Central America: South & Central America Occupational Health Market, By Safety – Revenue and Forecast to 2030 (USD Million)

Table 35. Rest of South & Central America: South & Central America Occupational Health Market, By Biological – Revenue and Forecast to 2030 (USD Million)

Table 36. Rest of South & Central America: South & Central America Occupational Health Market, By Employee Type – Revenue and Forecast to 2030 (USD Million)

Table 37. Rest of South & Central America: South & Central America Occupational Health Market, By Site Location – Revenue and Forecast to 2030 (USD Million)

Table 38. Rest of South & Central America: South & Central America Occupational Health Market, By Type – Revenue and Forecast to 2030 (USD Million)

Table 39. Rest of South & Central America: South & Central America Occupational Health Market, By Industry – Revenue and Forecast to 2030 (USD Million)

Table 40. Organic Developments in the Occupational Health Market

Table 41. Inorganic Developments in the Occupational Health Market

Table 42. Glossary of Terms

List Of Figures

LIST OF FIGURES

- Figure 1. South & Central America Occupational Health Market Segmentation
- Figure 2. South & Central America Occupational Health Market, By Country
- Figure 3. South & Central America Occupational Health Market Overview
- Figure 4. Services Segment Held Largest Share of Offerings Segment in South & Central America Occupational Health Market
- Figure 5. Argentina is Expected to Show Remarkable Growth During the Forecast Period
- Figure 6. South And Central America: PEST Analysis
- Figure 7. Experts Opinion
- Figure 8. South & Central America Occupational Health Market Impact Analysis of Driver and Restraints
- Figure 9. South & Central America Occupational Health Market– Revenue Forecast and Analysis – 2020–2030
- Figure 10. South & Central America Occupational Health Market Revenue Share, by Offerings 2022 & 2030 (%)
- Figure 11. Products: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 12. Solutions: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 13. Services: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 14. South & Central America Occupational Health Market Revenue Share, by Category 2022 & 2030 (%)
- Figure 15. Safety: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 16. Chemicals: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 17. Biological: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 18. Physical and Environment: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 19. Ergonomic: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)
- Figure 20. Vaccination and Immunizations: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 21. Others: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 22. South & Central America Occupational Health Market Revenue Share, by Employee Type 2022 & 2030 (%)

Figure 23. Remote: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 24. Hybrid: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 25. Physical Presence: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 26. South & Central America Occupational Health Market Revenue Share, by Site Location 2022 & 2030 (%)

Figure 27. On-Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 28. Off-Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 29. Shared Site: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 30. South & Central America Occupational Health Market Revenue Share, by Type 2022 & 2030 (%)

Figure 31. Physical Wellbeing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 32. Social And Mental Wellbeing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 33. South & Central America Occupational Health Market Revenue Share, by Industry 2022 & 2030 (%)

Figure 34. Automobile: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 35. Chemical: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 36. Engineering: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 37. Government: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 38. Manufacturing: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 39. Mining: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 40. Oil and Gas: South & Central America Occupational Health Market –

Revenue and Forecast to 2030 (US\$ Million)

Figure 41. Pharmaceutical: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 42. Ports: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 43. Others: South & Central America Occupational Health Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 44. South & Central America Occupational Health Market, By Key Country – Revenue (2022) (USD Million)

Figure 45. South & Central America Occupational Health Market Share by Country – 2022 & 2030, (%)

Figure 46. Brazil: South & Central America Occupational Health Market- Revenue and Forecasts To 2030 (USD Million)

Figure 47. Argentina: South & Central America Occupational Health Market- Revenue and Forecasts To 2028 (USD Million)

Figure 48. Rest of South & Central America: South & Central America Occupational Health Market - Revenue and Forecast to 2030 (USD Million)

Figure 49. Growth Strategies in the Occupational Health Market (%)

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