

## **Agricultural Testing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 132 pages | Mordor Intelligence

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### **Report description:**

The Agricultural Testing Market size is estimated at USD 6.50 billion in 2025, and is expected to reach USD 8.58 billion by 2030, at a CAGR of 5.7% during the forecast period (2025-2030).

#### **Key Highlights**

- Agricultural testing involves the examination of samples such as water, soil, and seeds to assess their quality and levels of contaminants. This industry is experiencing significant growth, particularly in developed areas and commercialized regions across the world. Regulations and laws largely drive the market's expansion to ensure environmental safety and improve agricultural productivity.
- Over the next few years, the agricultural testing market is anticipated to rebound strongly, driven by increased demand for farm products, leading to higher production and the need for regular soil testing. Additionally, there is a shift in consumer preferences toward higher standards of food safety and quality, particularly about chemical residues. This is creating a greater need to maintain soil properties for quality production, thus bolstering the market's growth.
- Globalization has necessitated standardized assessment techniques to facilitate the trade of grains and oilseeds. Consequently, exporters and importers are requesting analysis certificates to demonstrate compliance with global quality and safety standards. This has led to an increased demand for testing services related to agricultural outputs, particularly in regions with high agricultural exports. For instance, China saw a significant increase in the value of its brown rice exports from USD 168,867 thousand in 2020 to USD 211,847 thousand in 2022. However, exporters are facing challenges due to mold growth caused by high moisture levels in the grains. The high toxicity of the fungal growth has led to the rejection of brown rice in global markets due to stringent regulations on permissible toxicity levels.
- The agricultural testing market is currently dominated by North America. This is attributed to the region's stringent regulations related to food safety, environment, agriculture, nutritional content, chemicals, and labeling. The presence of numerous

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agricultural testing service providers in the region is contributing to the market's growth.

## Agricultural Testing Market Trends

### Regulations and Legislations Pertaining to Agriculture Testing and Environmental Safety

Regulations and legislation concerning agricultural testing and environmental safety have been key drivers for the market's growth. Government initiatives to address agricultural and food safety have propelled market expansion. For instance, the Food and Drug Administration (FDA) recently proposed revisions to the FDA Food Safety Modernization Act (FSMA) Produce Safety Rule to enhance food safety by preventing harmful contaminants in irrigation water from causing foodborne illnesses. Under the proposed guidelines, covered farms would be mandated to conduct pre-harvest agricultural water assessments at least once annually and whenever changes occur, thereby reducing the risk of contamination. These regulatory changes aim to provide farmers with greater flexibility while ensuring product safety for consumers.

Sample testing has gained popularity in commercialized agriculture countries to sustain the export growth of agricultural commodities. Seed and soil testing have also seen increased adoption, with the International Seed Testing Association (ISTA) playing a crucial role in standardizing procedures and modernizing the seed trade.

In April 2022, the Canadian government initiated the Canadian Grain Sampling Program (CGSP), allowing companies to gather and deliver samples from batches of seed, grain, and grain products to assist with phytosanitary certification for exports from Canada. This policy sets out the guidelines that the Canadian Food Inspection Agency (CFIA) uses to approve companies participating in the CGSP. Furthermore, this policy details the steps that need to be taken for the collection and submission of samples to the CFIA.

Moreover, in 2024, the UK government updated the grain standard operating protocol (GSOP) for the issue of phytosanitary certificates for the export of bulk grain from England and Wales to non-EU requiring certification, including the procedures for sampling and inspection of grain by authorized trade inspectors (ATI). The agricultural testing market is experiencing a major shift as government mandates enforce testing protocols to ensure safety and quality throughout the global supply chain. These guidelines necessitate meticulous procedures at every stage to prevent contamination, thereby driving the demand for agricultural testing across the world.

### North America is Expected to Dominate the Market

North America is the largest market for agricultural testing globally, with the United States being an attractive market due to the ongoing demand for seed testing. This demand is driven by the need for certifications for seeds in the United States. The Seed Regulatory and Testing Division (SRTD) plays a crucial role in testing agricultural seeds, ensuring the efficient and orderly marketing of seeds, and supporting the growth of the market. Furthermore, there is a significant emphasis on food safety initiatives. For instance, the United States Centers for Disease Control and Prevention (CDC) estimated that 48 million people get sick every year from a foodborne illness. To address this, the Federal Grain Inspection Service is standardizing testing methodologies, evaluating testing and laboratory services, and developing new testing and analytical methods to enhance end-use quality attributes as part of the Smarter Food Safety Blueprint plan.

In Canada, the agriculture sector has been undergoing significant changes due to technological advancements, policy changes, and evolving consumer preferences, with increased investments in the marketing of agriculture products to meet the increasing demand for high-quality, safe, and nutritionally consistent output. This increased demand has necessitated rigorous testing protocols, further driving the market for testing in the country. Additionally, the trend toward specific requirements in the

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agriculture sector is exemplified by companies such as Warburtons in the United Kingdom establishing contracts with Canadian wheat producers, emphasizing the growing need for tailored specifications. In 2023, the Harvest Sample Program received 379 samples of oilseed-type soybean, compared to 256 samples in 2022, highlighting the growing emphasis on testing.

These improved testing standards enhance the reputation of the North American agriculture sector and pave the way for increased exports, leading to a greater need for testing services to meet international quality and safety standards.

#### Agriculture Testing Industry Overview

The global agricultural testing market is fragmented, with numerous government-operated laboratories providing various agricultural testing services to farmers worldwide. Eurofins Scientific, R J Hill Laboratories Ltd, Agilent Technologies Inc., SGS SA, and Intertek are some of the major players. Companies compete in the agricultural testing market based on equipment quality and promotion and focus on strategic moves to hold larger shares in the market. New services, partnerships, and acquisitions are the major strategies adopted by the leading companies in the market.

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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