

# **Poultry Diagnostics Market Report by Disease Type (Avian Influenza, Avian Salmonellosis, Avian Mycoplasmosis, Infectious Bronchitis, Infectious Bursal Disease, Newcastle Disease, Chicken Anemia, and Others), Test Type (ELISA test, PCR Test, and Others), Service (Bacteriology, Parasitology, Virology), and Region 2023-2028**

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## **Abstracts**

The global poultry diagnostics market size reached US\$ 441.8 Million in 2022. Looking forward, IMARC Group expects the market to reach US\$ 791.2 Million by 2028, exhibiting a growth rate (CAGR) of 10.20% during 2022-2028. The rising poultry consumption, frequent outbreaks of avian influenza and Newcastle disease, stringent food safety regulations, significant technological advancements, growing awareness about the economic losses associated with poultry outbreaks, and ongoing research and development activities in this field are some of the key factors driving the market.

Poultry diagnostics is a crucial aspect of the poultry industry, focusing on the identification and management of diseases and health issues in poultry flocks. It plays a pivotal role in ensuring the well-being of poultry birds, which, in turn, safeguards the quality of poultry products for consumers. These diagnostics encompass a range of techniques, including laboratory tests, clinical examinations, and advanced imaging technologies. The primary objective of poultry diagnostics is to promptly detect and address diseases, such as avian influenza, Newcastle disease, and coccidiosis, among others. Early detection is vital to prevent the spread of diseases within flocks, reduce economic losses, and maintain food safety standards. Moreover, it aids in the development of effective vaccination and treatment strategies.

The increasing global demand for poultry products as a source of affordable and lean protein is a primary driver. This surge in consumption necessitates robust diagnostics to ensure the health and safety of poultry flocks. Additionally, frequent outbreaks of diseases like avian influenza and Newcastle disease have highlighted the vulnerability of poultry production. This has led to greater investments in diagnostic tools to quickly identify and contain diseases. Other than this, poultry producers are becoming increasingly aware about the economic losses associated with disease outbreaks. This awareness drives them to invest in proactive diagnostic measures to protect their flocks and bottom lines. Besides this, governments worldwide are enforcing stricter regulations on food safety, including poultry products. Poultry diagnostics are essential for compliance with these regulations and to maintain consumer trust. In line with this, advances in diagnostic technologies, such as PCR and ELISA, have enhanced the speed and accuracy of disease detection. This has spurred the adoption of these diagnostic methods in the poultry industry. Furthermore, ongoing research in the field of poultry diagnostics is leading to the development of more sophisticated and effective diagnostic tools, attracting both investments and market growth.

#### Poultry Diagnostics Market Trends/Drivers:

##### Rising Poultry Consumption

Poultry, such as chickens and turkeys, is a significant source of affordable and high-quality protein for a growing global population. As more people include poultry in their diets, there is a greater need to ensure the health and safety of poultry flocks to meet this demand. Poultry diagnostics play a critical role in maintaining the health of these birds, which directly impacts the quality and quantity of poultry products available for consumption. Healthy flocks are more productive and less prone to disease outbreaks, contributing to the overall efficiency of poultry farming operations. Therefore, the rise in poultry consumption is intrinsically linked to the demand for effective diagnostics to safeguard both animal health and food safety.

##### Frequent Disease Outbreaks

These diseases can spread rapidly within flocks, leading to significant economic losses for poultry producers. In response, the poultry industry has recognized the critical importance of early detection and management of diseases. Poultry diagnostics are indispensable tools for swiftly identifying the presence of pathogens responsible for these outbreaks. Rapid diagnosis allows for timely implementation of control measures, such as quarantine and vaccination, to contain the spread of the disease and limit economic losses. The potential for large-scale disruptions in poultry production due to

disease outbreaks has made poultry diagnostics a fundamental investment for the sustainability of the industry.

### Stringent Food Safety Regulations

Governments and regulatory bodies are placing greater emphasis on ensuring the safety of poultry products for consumers. This includes monitoring and controlling diseases that can be transmitted from poultry to humans. Poultry diagnostics play a pivotal role in meeting these regulatory requirements. They enable poultry producers to demonstrate compliance with strict health and safety standards, ensuring that poultry products are free from disease-causing agents. Failure to adhere to these regulations can result in product recalls, legal consequences, and damage to a reputation of a company.

### Poultry Diagnostics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2023-2028. Our report has categorized the market based on disease type, test type, and service.

### Breakup by Disease Type:

- Avian Influenza
- Avian Salmonellosis
- Avian Mycoplasmosis
- Infectious Bronchitis
- Infectious Bursal Disease
- Newcastle Disease
- Chicken Anemia
- Others

Avian Influenza accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the disease type. This includes avian influenza, avian salmonellosis, avian mycoplasmosis, infectious bronchitis, Newcastle disease, chicken anemia, and others. According to the report, Avian Influenza represented the largest segment.

Avian influenza, commonly known as bird flu, poses a significant threat to the global poultry industry due to its highly contagious nature and potential for rapid transmission

within poultry flocks. This heightened risk has prompted poultry producers to prioritize avian influenza diagnostics as a proactive measure to protect their flocks. Additionally, avian influenza has garnered substantial attention from governments and international organizations due to its zoonotic potential, meaning it can be transmitted from birds to humans. This dual threat to animal and human health has led to stringent monitoring and control measures, further driving the demand for avian influenza diagnostics to ensure early detection and containment. Moreover, avian influenza outbreaks can result in devastating economic losses, including mass culling of infected birds, trade restrictions, and decreased consumer confidence in poultry products. Therefore, the economic implications of avian influenza outbreaks have incentivized poultry producers to invest significantly in avian influenza diagnostics as part of their risk mitigation strategies.

Breakup by Test Type:

ELISA test

PCR Test

Others

ELISA test holds the largest share in the industry

A detailed breakup and analysis of the market based on the test type has also been provided in the report. This includes ELISA test, PCR test, and others. According to the report, ELISA test accounted for the largest market share.

ELISA is renowned for its versatility and wide applicability in detecting a broad spectrum of poultry diseases, including avian influenza, Newcastle disease, and salmonellosis, among others. This versatility makes it a preferred choice for many poultry producers and diagnostic laboratories as a comprehensive diagnostic tool. Besides this, ELISA tests offer high sensitivity and specificity, ensuring accurate and reliable results. The poultry industry places a premium on precise disease detection to make informed decisions promptly, such as initiating disease control measures or treatment protocols. Furthermore, ELISA tests are relatively cost-effective when compared to some other diagnostic methods, making them an attractive option for poultry producers seeking efficient disease management without significantly increasing operational costs. Additionally, the well-established nature of ELISA technology, along with a wealth of validated assays, instills confidence in its effectiveness among industry professionals and regulatory bodies. This confidence in reliability of ELISA and its track record of successful disease management contributes to its status as the largest segment in the

market by test type.

Breakup by Service:

Bacteriology

Parasitology

Virology

Bacteriology represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the service. This includes bacteriology, parasitology, and virology. According to the report, bacteriology represented the largest segment.

Bacteria play a pivotal role in poultry health, as bacterial infections can quickly spread within flocks and lead to severe economic losses. Bacteriology services encompass the isolation, identification, and characterization of bacterial pathogens responsible for various poultry diseases. This includes common issues like Salmonella and E. coli infections, which have significant implications for both poultry health and food safety. Moreover, food safety regulations and consumer demand for safe poultry products have intensified the focus on bacterial pathogens in poultry. As a result, poultry producers and processors rely heavily on bacteriology services to ensure that their products meet stringent safety standards and do not pose health risks to consumers. Furthermore, continuous research and innovation in bacteriology have led to the development of advanced diagnostic techniques, such as DNA sequencing and molecular methods, which offer higher specificity and sensitivity. This has further solidified position of bacteriology as the largest segment in the poultry diagnostics market by service, addressing critical needs for both animal health and public health.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

North America leads the market, accounting for the largest poultry diagnostics market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America has a well-established and highly industrialized poultry sector, with the United States being one of the largest poultry producers globally. This substantial poultry production requires rigorous disease management to ensure the health and safety of poultry flocks and the quality of poultry products, creating a substantial demand for diagnostic services and tools. Additionally, the region places a strong emphasis on food safety and consumer health. Stringent regulatory frameworks and consumer expectations for safe poultry products have spurred investments in advanced diagnostic technologies to detect and manage diseases effectively, thus supporting the growth of the poultry diagnostics market. Other than this, North America benefits from a mature healthcare and veterinary infrastructure, fostering the adoption of cutting-edge diagnostic methods. The presence of leading diagnostic companies, research institutions, and veterinary clinics further contributes to the availability and utilization of

poultry diagnostics in the region. Furthermore, the proactive approach of North America to research and development in the poultry industry ensures a continuous flow of innovation in diagnostics, meeting the evolving needs of the sector.

#### Competitive Landscape:

Leading companies in the poultry diagnostics sector are heavily investing in R&D. They are developing innovative diagnostic tools and technologies that offer higher sensitivity, specificity, and speed in disease detection. This commitment to innovation ensures that poultry producers have access to state-of-the-art diagnostics to safeguard their flocks. Additionally, numerous key players are forming strategic partnerships with research institutions and veterinary organizations. These collaborations foster knowledge exchange, allowing for the development of cutting-edge diagnostic solutions. Partnerships also help in expanding market reach and ensuring the widespread adoption of advanced diagnostic technologies. Other than this, recognizing the global nature of the poultry industry, key players are expanding their presence in various regions. This involves setting up distribution networks, establishing subsidiaries, and entering emerging markets with high poultry production potential. By offering their diagnostic products and services worldwide, these companies are capitalizing on the growing demand for poultry diagnostics. Furthermore, tailoring diagnostic solutions to the specific needs of poultry producers is a notable strategy. Key players are offering customized diagnostic packages that address the unique challenges faced by different poultry operations. This approach enhances customer satisfaction and fosters long-term partnerships.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AgroBioTek Laboratories  
BioChek B.V.  
Bionote Co. Ltd.  
Boehringer Ingelheim International GmbH  
IDEXX Laboratories Inc.  
MEGACOR Diagnostik GmbH  
QIAGEN N.V.  
Gezondheidsdienst voor Dieren B.V. (Royal GD)  
Thermo Fisher Scientific Inc.  
Zoetis Inc.

(Please note that this is only a partial list of the key players, and the complete list is

provided in the report.)

#### Recent Developments:

In 2022, IDEXX Laboratories Inc has announced the launch of a number of new diagnostic tests, as well as a new software application that helps farmers and producers to manage their poultry health. It has also introduced rapid testing methods and diagnostic assays that provide quick and accurate results for poultry diseases.

Qiagen, a leading player in the poultry diagnostics market, has focused on developing molecular diagnostic solutions for the poultry industry. It has launched advanced DNA and RNA-based tests to detect various pathogens and diseases in poultry.

Thermo Fisher Scientific Inc has been actively involved in the poultry diagnostics market. It has developed innovative solutions such as PCR-based testing kits and advanced diagnostic instruments to detect poultry diseases accurately.

#### Key Questions Answered in This Report

1. What was the size of the global poultry diagnostics market in 2022?
2. What is the expected growth rate of the global poultry diagnostics market during 2023-2028?
3. What are the key factors driving the global poultry diagnostics market?
4. What has been the impact of COVID-19 on the global poultry diagnostics market?
5. What is the breakup of the global poultry diagnostics market based on the disease type?
6. What is the breakup of the global poultry diagnostics market based on the test type?
7. What is the breakup of the global poultry diagnostics market based on the service?
8. What are the key regions in the global poultry diagnostics market?
9. Who are the key players/companies in the global poultry diagnostics market?



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