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Johne's Disease Diagnostics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Animal Type (Cattle, Goat, Sheep), By Test Type (ELISA, PCR, AGID, Others), By End User (Veterinary Hospitals & Clinics, Others), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/J590566BCB50EN.html
Date: January 2026
Pages: 180
Price: US$ 4,500.00 (Single User License)
ID: J590566BCB50EN

Abstracts

The Global Johne?s Disease Diagnostics Market is projected to expand from USD 675.66 Million in 2025 to USD 987.55 Million by 2031, registering a CAGR of 6.53%. This sector encompasses testing platforms and analytical assays, such as polymerase chain reaction (PCR) and enzyme-linked immunosorbent assays (ELISA), specifically engineered to identify Mycobacterium avium subspecies paratuberculosis in livestock populations. The primary catalyst for this growth is the urgent need to address production losses, particularly those resulting from premature culling and diminished milk yields in infected herds. Additionally, strict trade protocols and herd health certification programs mandate frequent surveillance, forcing producers to maintain regular screening schedules. Highlighting the economic stakes, Animal Health Ireland reported in 2024 that the disease costs the Irish dairy industry between ?11.24 million and ?23.85 million annually, necessitating effective diagnostic solutions.

A major obstacle restricting broader market growth is the insufficient sensitivity of existing diagnostic methods during the disease's prolonged subclinical stage. Because infected animals often produce undetectable antibody levels or shed bacteria in low quantities for years, false-negative results are common, which hinders eradication efforts. This technical struggle to detect early-stage infection can erode producer trust in the efficacy of screening, subsequently postponing the widespread implementation of comprehensive testing regimes in cost-conscious livestock operations.

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Market Driver

Technological innovations in rapid serological and molecular diagnostics are fundamentally transforming the market by satisfying the urgent requirement for sensitivity and speed in detecting Mycobacterium avium subspecies paratuberculosis. The rise of high-throughput PCR and phage-based technologies now permits the identification of viable bacteria significantly faster than legacy culture methods, which historically took months. For instance, the Animal Health Media Journal reported in November 2024, in an article titled 'New test detects Johne?s disease in day-old calves,' that a novel diagnostic system could identify active infection at least four weeks sooner than standard fecal PCR in 75% of trial instances. These advancements are crucial for interrupting transmission chains, allowing farmers to isolate infectious stock before they contaminate the environment and harm production metrics.

Furthermore, the enforcement of Government-Mandated Disease Control and Eradication Programs acts as a secondary major driver, making regular screening a standard operational necessity. These regulatory frameworks frequently tie market access to herd health status, obliging farmers to follow rigorous testing schedules to preserve trade certifications. As noted in 'Changes in the Johne?s Disease situation in GB dairy herds over 10 years' in Preventive Veterinary Medicine (August 2024), surveillance data indicated that the top 25% of herds with high average test values were responsible for 42% of all positive results, emphasizing the importance of centralized schemes in managing high-risk reservoirs. Moreover, these programs promote comprehensive management; according to the Journal of Dairy Science in 2024, incorporating young stock into testing protocols could decrease disease transmission by up to 30%, thereby boosting the global demand for diagnostic supplies.

Market Challenge

A significant impediment to the growth of the Global Johne?s Disease Diagnostics Market is the inadequate sensitivity of existing tools during the disease's extended subclinical phase. Since infected livestock frequently carry Mycobacterium avium subspecies paratuberculosis for years without generating adequate antibody responses or shedding detectable bacterial loads, standard assays often return false-negative results. This inability to accurately detect early-stage carriers damages producer confidence regarding the cost-efficiency of surveillance initiatives. When significant investments in screening fail to stop subsequent outbreaks because of undetected spreaders, livestock owners often hesitate to commit to the recurring testing schedules

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that generate market revenue.

This skepticism is further bolstered by data demonstrating low detection rates within managed populations. According to the Action Group on Johne?s, the mean prevalence of positive milk ELISA results in monitored herds across the United Kingdom was recorded at 2.7% in 2024. While this figure suggests effective management, it also underscores the challenge diagnostics face in revealing the broader reservoir of subclinical infection, thereby discouraging the widespread implementation of aggressive screening protocols among cost-sensitive farming operations.

Market Trends

The rise of AI-Powered MicroRNA Biomarker Technologies is revolutionizing the Global Johne?s Disease Diagnostics Market by resolving the sensitivity limitations inherent in traditional serology. In contrast to ELISA tests, which depend on lagging antibody production, microRNA profiling examines host-response gene expression to detect subclinical carriers before they become infectious. Utilizing machine learning algorithms, this molecular strategy enables the precise classification of early infection stages that standard assays miss. As reported by DVM360 in May 2025, in the article 'New diagnostic approach may help detect Johne disease in cattle earlier,' a newly validated AI-driven microRNA model achieved 71.8% accuracy in detecting Stage I and II infections, providing a vital tool for identifying silent spreaders and breaking transmission cycles.

Simultaneously, the integration of diagnostic testing with cloud-based herd management platforms is moving the industry from reactive diagnosis toward predictive risk stratification. Advanced software solutions now compile historical testing data to produce dynamic risk scores, enabling producers to foresee disease progression rather than simply responding to positive results. This digital shift supports algorithmic clustering to pinpoint high-risk animals that might be overlooked by standard protocols. According to Farmers Weekly in February 2025, in the article 'Johne?s risk detection improved with new data analysis tool,' predictive analytics showed that animals within specific high-risk data clusters were up to 1,000 times more likely to advance to an infectious state than low-risk counterparts, facilitating proactive biosecurity measures.

Key Market Players

Zoetis Inc.

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Thermo Fisher Scientific, Inc.

PBD Biotech Ltd

IDEXX Laboratories, Inc.

Innovative Diagnostics SAS

VMRD Inc.

BIOMeRIEUX S.A.

INDICAL BIOSCIENCE GmbH

Tetracore, Inc.

Surefarm Ltd

Report Scope

In this report, the Global Johne's Disease Diagnostics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Johne's Disease Diagnostics Market, By Animal Type

Cattle

Goat

Sheep

Johne's Disease Diagnostics Market, By Test Type

ELISA

PCR

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Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Johne's Disease Diagnostics Market.

Available Customizations:

Global Johne's Disease Diagnostics 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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