

# **Bovine Tuberculosis Diagnosis Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Tests (Molecular Diagnostic Tests, Serological Tests, Traditional Tests), By Region, By Competition**

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## **Abstracts**

Global Bovine Tuberculosis Diagnosis Market has valued at USD 735.27 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.81% through 2028. The Global Bovine Tuberculosis Diagnosis Market is a dynamic and evolving sector dedicated to the detection and management of bovine tuberculosis (bTB) in cattle populations. Bovine tuberculosis is a contagious disease caused by *Mycobacterium bovis*, which not only poses a significant threat to animal health but also carries potential zoonotic implications.

### **Key Market Drivers**

#### **Rising Awareness and Concern for Animal Health**

In recent years, there has been a remarkable increase in awareness and concern for animal health, particularly in the livestock industry. This heightened awareness has had a profound impact on various aspects of animal agriculture, including disease management. One disease that has come under the spotlight due to its implications for both animal health and public health is bovine tuberculosis (bTB).

Livestock, including cattle, play a crucial role in global agriculture. They are a source of food, income, and livelihood for millions of people. Any disease outbreak in livestock can have severe economic consequences, including reduced productivity, increased veterinary costs, and trade restrictions. As a result, cattle owners and the livestock

industry at large are becoming increasingly conscious of the economic impact of diseases like bTB.

There is a growing emphasis on animal welfare, with consumers and stakeholders demanding better living conditions and healthcare for animals. Bovine tuberculosis can cause significant suffering to affected cattle, including weight loss, lethargy, and respiratory distress. This suffering raises ethical concerns and highlights the importance of early detection and treatment.

Consumers are increasingly concerned about the safety and quality of the meat and dairy products they consume. Bovine tuberculosis can pose a risk to food safety if not detected and managed properly. Contaminated dairy products can transmit the disease to humans, making it a public health concern. As a result, consumers are more inclined to support measures that ensure disease-free cattle herds.

As awareness of the impact of bTB on animal health and welfare grows, cattle owners and industry stakeholders are more willing to invest in the diagnosis and management of the disease. They recognize that early detection is key to preventing the spread of bTB within herds.

The heightened concern for animal health has led to increased funding for research and development in the field of veterinary diagnostics. This investment has resulted in the development of more accurate and efficient diagnostic tools for bTB, including interferon-gamma release assays (IGRAs), PCR-based tests, and serological tests.

Governments and regulatory bodies are responding to the rising awareness of animal health concerns by implementing stricter regulations related to disease monitoring and control. These policies often mandate regular bTB testing and surveillance, creating a consistent demand for diagnostic services and products.

Increased awareness has encouraged collaboration between cattle owners, veterinary professionals, diagnostic laboratories, and research institutions. This collaboration promotes the exchange of knowledge and best practices, leading to more effective bTB management strategies.

## Zoonotic Risk and Public Health Concerns

Zoonotic diseases, those that can be transmitted from animals to humans, have been a growing concern in the realm of public health. Among these diseases, bovine

tuberculosis (bTB) stands out as a significant threat due to its zoonotic potential. The awareness of this zoonotic risk and associated public health concerns has been a driving force behind the growth of the Global Bovine Tuberculosis Diagnosis Market.

Bovine tuberculosis is caused by *Mycobacterium bovis*, a pathogen that can infect both cattle and humans. While human infections are relatively rare compared to those in cattle, they can have severe consequences. Transmission to humans primarily occurs through the consumption of unpasteurized dairy products or direct contact with infected cattle. Once infected, humans can develop a range of health issues, including respiratory problems and even death in severe cases.

The zoonotic risk associated with bTB has raised significant public health concerns. Governments, health organizations, and the general public have become increasingly aware of the potential consequences of this disease. This heightened concern has led to greater efforts to control and manage bTB in cattle herds.

Zoonotic diseases like bTB require early detection to prevent transmission to humans. As a result, there is a growing demand for accurate and timely diagnostic tools to identify infected cattle. This demand is a key driver of market growth, as it necessitates the availability of reliable diagnostic tests.

The contamination of dairy products with *Mycobacterium bovis* poses a direct threat to food safety. In response, food safety regulations have become more stringent, requiring rigorous testing of cattle herds. Compliance with these regulations drives the need for advanced diagnostic methods, further boosting the market.

In an era of increased global connectivity, zoonotic diseases can easily cross borders. The risk of bTB spreading across regions and countries has led to international health security concerns. As a result, there is a push for standardized and effective diagnostic methods to ensure the early detection and containment of the disease.

The zoonotic risk of bTB has spurred research and development efforts aimed at improving diagnostic accuracy and efficiency. These investments have resulted in the development of more advanced diagnostic assays, such as interferon-gamma release assays (IGRAs) and PCR-based tests, which are crucial for early detection.

### Advancements in Diagnostic Technologies

Advancements in diagnostic technologies have been a driving force behind the

evolution of healthcare and disease management across various sectors. In the realm of veterinary medicine, these innovations are playing a pivotal role in transforming the Global Bovine Tuberculosis Diagnosis Market. Bovine tuberculosis (bTB), a contagious disease affecting cattle and posing zoonotic risks, has witnessed significant growth in diagnostic capabilities thanks to these technological strides.

Accurate and early diagnosis of bovine tuberculosis is crucial for disease management and control. Traditionally, diagnostic methods relied on tuberculin skin tests, which had limitations in terms of sensitivity and specificity. However, recent advancements in diagnostic technologies have revolutionized the field, offering more reliable and efficient tools for detecting bTB.

IGRAs are a prime example of technological advancement in bTB diagnosis. These blood tests measure the release of interferon-gamma, a protein produced by the immune system when exposed to *Mycobacterium bovis*, the causative agent of bTB. IGRAs are highly specific and sensitive, reducing the likelihood of false positives and negatives. The adoption of IGRAs has significantly improved the accuracy of bTB diagnosis.

Polymerase Chain Reaction (PCR) technology has revolutionized molecular diagnostics, including bTB detection. PCR-based tests can detect the DNA of *Mycobacterium bovis* in clinical samples, offering a highly sensitive and specific method for identifying infected cattle. These tests have greatly expedited the diagnosis process, allowing for earlier intervention and control measures.

Serological tests detect specific antibodies produced by the host's immune system in response to bTB infection. Advancements in serological test development have resulted in improved accuracy and efficiency. These tests provide a complementary diagnostic approach to existing methods, enhancing the overall diagnostic toolkit.

The integration of digital health solutions has streamlined the diagnostic process. Digital platforms and data analytics enable real-time monitoring of disease prevalence and transmission patterns. Additionally, they facilitate data sharing and communication among stakeholders, leading to more effective disease management strategies.

Miniaturized diagnostic devices and point-of-care tests are becoming increasingly available. These technologies allow for rapid, on-site testing, reducing the time and resources required for diagnosis. This is particularly valuable in remote or resource-limited areas where timely bTB diagnosis is essential.

Automation and robotics have improved the efficiency and throughput of diagnostic laboratories. High-throughput robotic systems can process a large number of samples quickly and accurately, enabling large-scale bTB testing and surveillance efforts.

### Increasing Cattle Populations

The Global Bovine Tuberculosis Diagnosis Market is undergoing a period of significant growth, driven by various factors, one of which is the increasing global population of cattle. As cattle populations continue to rise to meet the growing demand for meat and dairy products, the need for effective disease surveillance and control, particularly in the case of bovine tuberculosis (bTB), becomes more pronounced.

Cattle are a fundamental component of the global agricultural landscape, providing essential resources such as meat, milk, and hides. The rising human population, urbanization, and changing dietary habits have led to an increased demand for livestock products. Consequently, cattle populations have been expanding to meet this growing demand. As emerging economies experience income growth and urbanization, there is a rising demand for protein-rich diets, including beef and dairy products. This trend has led to an increase in cattle production worldwide. The dairy industry, in particular, has seen significant expansion due to increased demand for milk and dairy products. Dairy cattle populations have surged in response to this demand. In many regions, cattle farming remains a primary source of livelihood for rural communities. The growth in cattle populations supports the livelihoods of millions of smallholder farmers.

With more cattle in existence, the probability of bTB infections increases. This necessitates more extensive disease surveillance and diagnostic testing to identify infected animals. Regulatory bodies and governments, recognizing the potential for bTB transmission, often require routine testing and surveillance of cattle herds. As cattle populations grow, so does the demand for diagnostic services and tests. The economic consequences of bTB in cattle herds can be severe. Reduced productivity, treatment costs, and trade restrictions can have a significant impact on the livestock industry. Therefore, cattle owners and industry stakeholders are more willing to invest in diagnostic solutions to protect their herds and investments. As cattle populations rise globally, the demand for bovine tuberculosis diagnosis services extends beyond individual countries. This expansion provides opportunities for diagnostic companies to broaden their market reach and cater to the needs of diverse regions.

### Key Market Challenges

## Diagnostic Accuracy

One of the primary challenges in bTB diagnosis is achieving high diagnostic accuracy. Traditional methods like the tuberculin skin test can yield false-positive or false-negative results, leading to misdiagnosis. Achieving a balance between sensitivity and specificity in diagnostic tests is crucial to ensuring accurate and reliable results.

## Early Detection

Early detection of bTB is essential to prevent the disease's spread within cattle herds and minimize its impact on animal health and productivity. However, achieving early detection is challenging because bTB can remain latent in cattle for extended periods before becoming detectable.

## Zoonotic Risk

Bovine tuberculosis is a zoonotic disease, meaning it can be transmitted from cattle to humans. The zoonotic potential of bTB poses a significant public health concern. Reducing zoonotic risk requires effective disease management in cattle herds, which relies on accurate diagnosis and timely interventions.

## Key Market Trends

### Advancements in Molecular Diagnostics

Molecular diagnostic techniques, such as Polymerase Chain Reaction (PCR) and next-generation sequencing (NGS), are gaining prominence in bTB diagnosis. These techniques offer higher sensitivity and specificity, allowing for early and accurate detection of *Mycobacterium bovis*, the causative agent of bTB. The adoption of molecular methods is expected to increase as they become more accessible and affordable.

### Point-of-Care Testing

The development of rapid, point-of-care diagnostic tests for bTB is a significant trend in the market. These tests provide quick results at the farm or clinic, reducing the time and cost associated with sample transportation and centralized laboratory testing. Point-of-care tests can improve disease management by enabling timely interventions.



## Serological Assays and Antibody Detection

Serological tests that detect specific antibodies produced in response to bTB infection are gaining attention. These tests offer a complementary approach to traditional diagnostic methods, such as the tuberculin skin test and interferon-gamma assays. Advancements in serological assays aim to improve their sensitivity and specificity.

## Segmental Insights

### Test Type Insights

Based on the category of Tests, the traditional testing methods had a dominant market presence and contributed significantly to revenue in 2022. Among these traditional tests, the Single Intradermal Comparative Cervical Tuberculin (SICCT) test stands out as the most widely used clinical examination technique worldwide for detecting bovine TB in different types of herds and cattle. The Agriculture and Horticulture Development Board in the UK even recommends SICCT as the primary screening test for TB in cattle. This test involves injecting two types of tuberculin (bovine and avian) into the neck skin layers of animals, with the results being read 72 hours after the injection. The test's specificity and sensitivity at a standard interpretation are exceptionally high at 99.98%, factors that instill trust and drive product usage, thereby enhancing the growth of this market segment.

On the other hand, the molecular diagnostic tests segment is expected to experience a CAGR in the bovine TB diagnosis market during the forecast period. This growth is attributed to increased research and development efforts by key industry players aimed at developing more advanced and reliable molecular diagnostic products. These innovations include the adoption of rapid and precise diagnostic tools like real-time PCR for confirming bovine TB. For instance, in February 2020, Idvet introduced the ID Gene Mycobacterium tuberculosis complex Duplex qPCR (product code IDTUB-50 and IDTUB-100). This test kit comes with pre-prepared reagents, a positive control, and an external internal control. It can be used to analyze lymph nodes and peripheral tissue samples from cattle and various other livestock animals.

## Regional Insights

In the bovine tuberculosis (TB) diagnosis market, Europe took the lead and captured a significant share of revenue in 2022. The strong European presence can be attributed to

several factors, including the presence of major industry players, the implementation of strategic initiatives aimed at expanding market reach, government programs dedicated to eradicating bovine TB, and a substantial cattle population. As per data from the European Commission, the cattle population in the region exceeded 77 million as of December 2019. Additionally, another significant driving force behind regional growth is the relatively high prevalence of bovine tuberculosis in cattle herds. According to the European Union Reference Laboratory, the disease's prevalence in Europe increased from 1.0% to 1.8% between 2010 and 2019.

In the Asia Pacific region, the market is poised for rapid growth, with a projected CAGR in the coming years. This growth can be attributed to increasing awareness about the disease in developing nations and the rising disposable income in key markets. The increasing demand for timely and accurate diagnosis of bovine TB, particularly in countries like India, is further fueling market expansion. According to a study published in the Research Gate Journal in 2018, the estimated prevalence of bovine tuberculosis in India ranged from 14.31% to 34.42%.

### Key Market Players

IDEXX Laboratories Inc

PBD Biotech Ltd

Zoetis Inc

Innovative Diagnostics

Thermo Fisher Scientific Inc

Enfer Group

AsureQuality Australia Pty Ltd

Bio-Rad Laboratories Inc

BioNote Inc

Report Scope:



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

Bovine Tuberculosis Diagnosis Market, By Tests:

Molecular Diagnostic Tests

Serological Tests

Traditional Tests

Bovine Tuberculosis Diagnosis Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Bovine Tuberculosis Diagnosis Market.

## Available Customizations:

Global Bovine Tuberculosis Diagnosis market report with the given market data, Tech Sci 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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