

Food Allergen Testing Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Test Type (Allergen Testing, Intolerance Testing), By Source (Peanut and Soy, Wheat, Milk, Egg, Tree Nuts, Seafood, and Others), By Technology (PCR (Polymerase Chain Reaction)-Based, Immunoassay Based/ELISA, and Other Tests/Techniques), By Food Type (Bakery and Confectionery, Infant Food, Processed Food, Dairy Products and Alternatives, Seafood and Meat Products, and Other Foods), By Region, Competition

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Abstracts

The Global Food Allergen Testing Market was valued at USD 740.10 million in 2022 and is expected to exhibit robust growth during the forecast period, with a CAGR of 6.07% through 2028. Food safety and quality are significant concerns within the food manufacturing, retail, and hospitality industries, as they have a profound impact on productivity. There has been a global rise in food allergies, including the number of allergens, sensitization rate, and prevalence rate. Adequate management, testing, and clear labeling of allergens in processed foods are crucial to safeguard individuals with food allergies in the community. The importance of allergen testing has grown, with testing laboratories playing a vital role in allergen detection. These laboratories primarily focus on testing foods for the presence of allergens such as soy, dairy, peanut, tree nut, and others.

Key Market Drivers:

Rising Cases of Food Allergies:

Food allergy has emerged as a significant public health concern, with children being the most vulnerable population group. They are also two to four times more susceptible to other allergic conditions, such as asthma or eczema. According to data from Food Allergy Research & Education in 2021, one in ten adults and one in 13 children in America have different food allergies. The increasing prevalence of food allergies has driven the global food allergen testing market as reported by medical establishments.

Age-Dependent Reactivity to Allergenic Foods:

Food allergies affect a larger proportion of children compared to adults, and reactivity to certain allergenic foods, such as milk and egg, tends to be primarily outgrown. Conversely, allergy to other foods, such as peanuts, generally persists. Moreover, lactose intolerance is also a condition that is affecting a growing number of people worldwide.

Food testing labs are actively engaging in mergers and acquisitions with other laboratories to enhance their testing capabilities. For instance, in June 2022, Eurofins Scientific acquired majority stakes in Ajal Laboratories to expand its food and pharmaceutical testing offerings in Saudi Arabia.

The increasing number of food allergy cases has prompted public health authorities worldwide to take significant measures to mitigate allergic reactions and their consequences. Government support, awareness campaigns, private sector initiatives, and participation from other stakeholders have elevated the prominence of food allergies among all other types of allergies.

Consumer Awareness and Demand for Label Transparency

Consumer awareness of food allergies and the desire for label transparency have increased significantly. As consumers become more conscious of allergen risks, they demand clear and accurate allergen labeling on food products, which drives the need for robust allergen testing methods.

Various food categories, including baby foods, bakery and confectionery, dairy, beverages, convenience goods, and meat products, can potentially trigger allergies. This has led to the growth of the food allergen testing market. Additionally, due to

substandard animal feed, there is a risk of meat causing allergies in humans. Despite the food and beverages industry witnessing an increased demand for animal feed additives to enhance feed quality, the food intolerance testing market remains crucial in addressing meat-related allergies.

While more than 170 foods are known to cause allergies in sensitive individuals, the USDA and the FDA have identified eight major allergenic foods based on the 2004 FALCPA (the Food Allergen Labeling and Consumer Protection Act).

Growing international Food Trade

The globalization of the food supply chain has increased the complexity of allergen management for manufacturers and importers. As food products are distributed across borders, allergen testing becomes crucial to comply with different countries' regulations and protect consumers from allergen exposure.

Ongoing advancements in food allergen testing technologies have made testing more efficient, sensitive, and accurate. New methods, such as PCR-based tests, ELISA (Enzyme-Linked Immunosorbent Assay), and LC-MS/MS (Liquid Chromatography-Mass Spectrometry), have improved the detection and quantification of allergenic proteins.

Increased Government Regulations

High-profile food recalls related to undeclared allergens or allergens cross-contamination have increased awareness of the importance of accurate allergen testing and have spurred the implementation of stricter testing protocols in the industry. Food allergen management systems, including allergen testing, are becoming an integral part of food safety management systems such as Hazard Analysis and Critical Control Points (HACCP) and Good Manufacturing Practices (GMP).

Key Market Challenges

Stringent Food Safety Regulations

Numerous obstacles impede the accurate diagnosis of food allergies (FA) in developing regions. Evidence suggests that parents and healthcare workers in these areas lack sufficient knowledge about food allergies, and in vitro diagnostic tests are not easily accessible. Early diagnosis of FA is crucial for prognosis and proper nutritional management. However, even in developed countries, there is a reported diagnostic lag

of four months, particularly in infants with less severe manifestations of non-IgE mediated milk allergy. This situation is likely worse in developing countries, as Aguilar-Jasso et al. discovered a 38-month delay in the diagnosis of FA in North-Western Mexico.

The lack of food control infrastructure and resources in developing countries, as well as technical difficulties in sampling, testing, and protein identification, are expected to hinder market growth. Currently, Middle Eastern and African countries, along with other low-income nations, face limitations due to low awareness about food allergens and intolerance testing. Additionally, the lack of government initiatives, poor economies, and overall lack of awareness among individuals regarding food-related allergies will impede the market's progress. Nevertheless, every country must adhere to guidelines established by different authorities, which may pose challenges to the growth of the global food allergens and intolerance testing market.

Lack of Standardization

The absence of standardized methods and reference materials for allergen testing can create variability in results between different testing laboratories and methods. Standardization is essential for ensuring consistency and reliability in allergen testing across the food industry.

Detecting allergens in food products, especially at trace levels, can be difficult. Cross-contamination during food processing or inadequate cleaning of equipment may lead to allergen presence in foods, making it challenging to ensure accurate allergen testing.

Key Market Trends

Rapid Testing Methods

There was a growing demand for rapid allergen testing methods that provide quick and accurate results. These methods allowed for faster decision-making in food production and distribution, enabling timely recalls or corrective actions if allergens were detected.

Advancements in testing technologies were leading to improved sensitivity and specificity in allergen detection. High sensitivity allowed for the detection of allergens at lower concentrations, while high specificity reduced the risk of false positives. Point-of-care allergen testing devices and kits were emerging, allowing for on-site testing at food processing facilities and restaurants. Point-of-care testing offered real-time results,

facilitating rapid decision-making and allergen management.

Technological Advancement for Testing

Next-generation sequencing technologies were increasingly explored for allergen testing, providing a comprehensive analysis of food samples and the identification of multiple allergenic proteins simultaneously.

Remote sensing and imaging technologies were investigated for their potential to detect allergens in food products without the need for physical sample collection and testing.

The food allergen testing market saw a shift towards digitalization and data management solutions. These technologies facilitated the storage, analysis, and retrieval of allergen testing data, ensuring better traceability and transparency in the supply chain.

Segmental Insights

Test Type Insights

The increasing prevalence of food allergies among consumers has heightened health consciousness, leading to advancements in food allergen testing methods and driving the growth of this segment. For instance, according to the CDC/National Center for Health Statistics in 2023, nearly 1 in 3 U.S. adults and more than 1 in 4 U.S. children reported having a food allergy. Furthermore, approximately 6% of U.S. adults and children have a food allergy, which further propels the growth of this segment throughout the projected period.

Source Type Insights

Peanut and soy are anticipated to garner increased attention in the source segment of the global food allergen testing market, given that peanut allergy is the most prevalent and frequently encountered allergy across all age groups. On the other hand, soy allergy is more commonly observed in children and infants. When peanuts enter the body, some individuals' immune systems overreact and perceive the peanut protein as a threat, resulting in peanut allergy. This allergic reaction can manifest as irregular breathing rate, throat swelling with pain, sudden drop in blood pressure, pale skin or blue lips, fainting, and dizziness, potentially leading to severe consequences. Notably, peanut allergy is most prevalent in the United States, affecting 1 in 250 children and 1 in

70 adults. Furthermore, the incidence of peanut allergy in the US has tripled due to the consumption of counterfeit peanuts, although the exact cause remains unclear.

Regional Insights

The North American food allergen testing market is a prominent regional market. The prevalence of food poisoning and foodborne diseases in the region contributes to the market's growth. Salmonella, campylobacter, E. coli, and listeria are common pathogens that can cause foodborne illnesses. Salmonella can infect vegetables, chicken, eggs, beef, and pork, while campylobacter is primarily transmitted through chicken. According to the Centers for Disease Control and Prevention (CDC), approximately 48 million people in the United States are affected by food poisoning each year. Among them, 128,000 require hospitalization, and 3,000 succumb to foodborne diseases annually. As a result, consumers in the region are increasingly demanding accountability in food safety. The growing demand for enhanced food safety, along with the implementation of government regulations like the FDA Food Safety Modernization Act (FSMA), is driving the market's growth in the United States.

Key Market Players

3M

Als Limited

Asurequality Limited

Auriga Research

Bureau Veritas

Eurofins Scientific Se

Intertek Group Plc

Merieux Nutrisciences

Microbac Laboratories Inc

Neogen Corporation

Report Scope:

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

Food Allergen Testing Market, By Test Type:

Allergen Testing

Intolerance Testing

Food Allergen Testing Market, By Source:

Peanut and Soy

Wheat

Milk

Egg

Tree Nuts

Seafood

Others

Food Allergen Testing Market, By Technology:

PCR (Polymerase Chain Reaction)-Based

Immunoassay Based/ELISA

Other Tests/Techniques

Food Allergen Testing Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

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 Food Allergen Testing Market.

Available Customizations:

Global Food Allergen Testing 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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