

Salmonella Testing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Testing Method (Culture-based Methods, Molecular-based Methods, and Immunoassays), By Sample Type (Food, Water, and Environmental Surfaces), By End User (Food Producers and Manufacturers, Contract Testing Laboratories, and Government and Regulatory Bodies, Others), By Region and Competition, 2019-2029F

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Abstracts

Global Salmonella Testing Market was valued at USD 2.45 Billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 5.62% through 2029. Testing for Salmonella, a common cause of foodborne illnesses characterized by symptoms such as diarrhea, fever, cramps, and vomiting, involves detecting the bacteria in various samples like food, water, or biological specimens. This process typically employs specific laboratory conditions and culture-based methods to isolate Salmonella, which is subsequently confirmed through biochemical tests and sometimes serotyping. In molecular studies, Polymerase Chain Reaction (PCR) is frequently utilized to swiftly and accurately detect Salmonella DNA or RNA. Additionally, immunoassays are valuable for rapidly detecting Salmonella antigens or antibodies, serving as effective screening tools. Such testing plays a critical role in ensuring food safety, diagnosing illnesses in both humans and animals, and investigating outbreaks. Depending on the specific purpose whether it's food safety or clinical diagnosis different methodologies are chosen. Clinical laboratories, for instance, conduct screenings to diagnose Salmonella infections in patients suspected of food poisoning.

Stringent regulations from agencies like the FDA and EFSA drive adoption of robust testing protocols. Automation reduces errors and boosts efficiency in large-scale testing. Rapid diagnostic tests offer quick results for prompt interventions, although they can be costly initially, limiting adoption in some sectors. The Salmonella testing market grows due to technological advancements, rising awareness of food safety, and stricter global regulations. Future efforts focus on developing faster, more sensitive, and cost-efficient methods to improve Salmonella detection and prevention.

Key Market Drivers

Increasing Incidences of Foodborne Illness

As instances of foodborne illnesses increase, there is a growing need for dependable and efficient solutions for testing Salmonella. This includes rapid diagnostic tests for swift identification during outbreaks and thorough testing methods for ongoing surveillance in food production. According to the World Health Organization (WHO), unsafe food results in 600 million cases of foodborne diseases and 420,000 deaths annually worldwide. This concern compels governments, regulatory bodies, and food producers to enforce rigorous testing protocols to ensure food safety and prevent outbreaks.

Heightened consumer awareness about food safety issues has raised expectations for the safety and quality of food products. This prompts food producers to invest in robust Salmonella testing to uphold consumer confidence and comply with regulatory standards. According to a report by the World Bank, unsafe food results in an annual loss of US\$ 110 billion in productivity and medical expenses in low- and middle-income countries. Globally, one in ten people falls ill after consuming contaminated food. The globalization of food supply chains has increased the risk of contamination and transmission of pathogens such as Salmonella across borders. Consequently, maintaining international trade and consumer safety necessitates consistent and dependable testing practices.

The escalating occurrences of foodborne illnesses attributed to Salmonella are driving substantial demand for advanced and reliable testing solutions in the Salmonella testing market. This trend is anticipated to continue shaping the market landscape, fostering the development of new technologies and stringent testing protocols to bolster global food safety standards.

Stringent regulatory frameworks

Government regulations mandate testing for Salmonella and other pathogens in food products to ensure consumer safety. These regulations define the types of tests, frequency of testing, and acceptable pathogen limits, thereby increasing the demand for testing services and products. The USDA's FSIS plans to introduce a formal regulatory proposal for Salmonella in poultry by 2024. Similarly, the CFIA has updated its Salmonella Testing Regulations for Hatcheries and Poultry Breeders to align with US and EU standards, aiming to prevent and control foodborne illnesses linked to poultry and eggs, and to achieve national consistency, modernization, and alignment with global trading partners.

Regulatory bodies such as the FDA in the US and EFSA in Europe enforce rigorous standards to prevent Salmonella-related foodborne illnesses. Compliance with these standards is crucial for food producers to avoid penalties and maintain their market credibility. The European Union's Commission Regulation (EC) No 2073/2005 establishes microbiological criteria for food safety, including Salmonella, to be applied from January 1, 2006, for various foodborne bacteria and toxins.

There is an increasing trend towards global harmonization of food safety regulations to facilitate international trade. This shift compels manufacturers to adopt standardized testing methods that meet regulatory requirements across different regions. Regulatory compliance plays a pivotal role in enhancing consumer confidence in food products. Consumers expect manufacturers to adhere to stringent testing standards set by regulatory authorities to protect their health and well-being. Stringent regulatory frameworks generate consistent demand for Salmonella testing services from food producers, testing laboratories, and regulatory agencies themselves. This demand expansion contributes to the growth of the testing solutions market.

Key Market Challenges

Sample Complexity

Sample complexity presents a significant hurdle for the Salmonella testing market because Salmonella can be detected in a wide range of sources. It appears in various types of samples such as food products (like meat, dairy, and eggs), environmental samples (including water and soil), and clinical samples (such as feces and blood). Each type of sample necessitates different preparation and enrichment methods to effectively detect the pathogen. Food matrices and environmental samples often contain substances that can disrupt testing methods, potentially resulting in incorrect test

outcomes. For instance, fats, proteins, and other compounds found in food matrices might impede bacterial growth or interfere with molecular detection techniques. In addition, environmental samples can harbor intricate microbial communities, which might obscure the identification of Salmonella or introduce competition during enrichment processes. Distinguishing Salmonella from closely related species or background microflora further complicates the testing process. Furthermore, validating Salmonella testing techniques across diverse sample types poses challenges due to variations in matrix composition, bacterial concentration, and possible sources of interference. Methods that have been validated for one type of sample may not perform equally well with others. Regulatory bodies typically impose specific criteria for Salmonella testing in different sample types such as food, water, and clinical specimens. Complying with these requirements while maintaining consistent and accurate results adds another layer of complexity to the process.

Emerging Strains

The emergence of novel Salmonella strains presents a significant market challenge for the Salmonella testing industry. These new strains often contain genetic variations that may not be effectively identified using current testing methodologies, thereby compromising the reliability and efficacy of existing protocols. For instance, Salmonella Typhi strains frequently exhibit resistance to ciprofloxacin, reducing treatment options. In a recent study conducted at the Istituto Zooprofilattico Sperimentale della Puglia e della Basilicata (IZSPB) laboratories, six Salmonella Infantis strains were isolated from broiler litter and carcasses between 2018 and 2022. The investigation, published in the Microorganisms journal, evaluated their phenotype, antibiotic resistance, and genomic profiles. Emerging strains may harbor distinct virulence factors or antibiotic resistance profiles, potentially leading to more severe infections or treatment challenges. This underscores the critical need for accurate and timely detection to prevent outbreaks and mitigate health risks. Given the global nature of food supply chains, Salmonella strains can rapidly spread across regions. This underscores the importance of standardized testing protocols and international cooperation to effectively monitor and manage the dissemination of new strains. Addressing these challenges necessitates collaboration among industry stakeholders, regulatory bodies, and research institutions to develop and deploy effective strategies for detecting and responding to emerging Salmonella strains.

Key Market Trends

Focus on Combination Therapies

Technological advancements are pivotal in shaping the Salmonella testing market, fostering innovation and enhancing capabilities across various sectors. Polymerase Chain Reaction (PCR) and other molecular diagnostic methods have revolutionized Salmonella testing, providing rapid, sensitive, and specific detection of bacteria. These techniques are essential for precise detection of low levels of Salmonella in diverse sample types, crucial for clinical diagnostics and food safety. The market for rapid diagnostic tests (RDTs) is expanding, offering quick on-site detection of Salmonella through immunological methods like lateral flow assays or antigen-antibody interactions, delivering results within minutes. In 2024, a novel technology utilizing magnetic nanoparticles (MNPs) and gold nanoparticles (GNPs) was introduced to improve Salmonella detection in poultry. MNPs concentrate bacterial cells using magnets from large-volume samples, while GNPs are tailored to selectively react with Salmonella-specific DNA. Another innovation in 2023 involved CrisprBits, leveraging CRISPR gene-editing technology to develop a point-of-care testing platform for multiple pathogens, including Salmonella. These tests are undergoing validation studies and anticipate market entry following approvals from regulatory bodies like the Central Drugs Standard Control Organisation (CDSCO).

AI and data analytics are further enhancing Salmonella testing by enabling advanced data processing, pattern recognition, and predictive modeling. Ancera, in 2023, launched the Ancera Salmonella System Monitoring (SSM) software platform. This system integrates mobile surveillance networks, CRISPR databases, epidemiological models, and predictive software to provide real-time insights into Salmonella across the poultry supply chain, thereby mitigating risks and improving operational efficiency. These advancements underscore ongoing efforts in research and development, poised to drive innovation, enhance accuracy, and expand applications of Salmonella testing globally. Continued progress in these areas is expected to fuel the evolution and growth of the Salmonella testing market in the years ahead. enhanced

Segmental Insights

Testing Method Insights

Based on Testing Method, the Molecular-based Methods emerged as the fastest growing segment in the global market for Salmonella Testing during the forecast period. Molecular-based methods, such as Polymerase Chain Reaction (PCR) and other nucleic acid amplification techniques, enable rapid detection of Salmonella DNA or RNA. They deliver results in a matter of hours, contrasting with the days typically

required by conventional culture-based methods. Ongoing advancements in molecular diagnostics, including real-time PCR and next-generation sequencing (NGS), continually enhance the speed, sensitivity, and capacity for multiplexing, driving their widespread adoption. In 2023, researchers from the Singapore Food Agency's National Center for Food Science and the National University of Singapore developed a real-time PCR approach for detecting viable *Salmonella* Enteritidis contamination in shell eggs. Integration of this method could significantly expedite traditional *Salmonella* testing processes. Automation and high-throughput technologies have further bolstered the appeal of molecular methods by enabling the simultaneous processing of large sample volumes. This capability makes molecular methods suitable for both routine testing and rapid response during outbreak investigations. Molecular-based methods have garnered broad regulatory acceptance for *Salmonella* testing across diverse industries and geographic regions. These methods can be seamlessly integrated with other technologies such as real-time PCR, multiplex PCR, and NGS, allowing for concurrent detection of multiple pathogens and genetic variants. This integrative capacity supports comprehensive pathogen surveillance and facilitates epidemiological studies. The combination of speed, sensitivity, regulatory endorsement, and integration with advanced technologies positions molecular-based methods as indispensable tools for ensuring food safety, diagnosing infections, and upholding global public health standards.

Sample Type Insights

Based on Sample Type, Food emerged as the dominating segment in the global market for *Salmonella* Testing in 2023. Food items, especially raw meats, poultry, eggs, dairy products, and fresh produce are common carriers of *Salmonella*, with contamination possible at multiple stages from production through to distribution and preparation. *Salmonella* presence in food can result in widespread foodborne illnesses, posing substantial risks to public health. In 2024, New Zealand Food Safety issued a recall of Davis Trading Company's imported sesame seeds due to potential *Salmonella* contamination. Ensuring the safety and quality of food products is essential for maintaining consumer confidence. Regular testing for pathogens like *Salmonella* allows food manufacturers to demonstrate their commitment to food safety and compliance with industry regulations. Advancements in molecular-based testing methods, such as PCR and NGS, have significantly enhanced the speed, accuracy, and sensitivity of *Salmonella* detection in food samples. These technologies facilitate quicker turnaround times for test results, crucial for timely responses to prevent contamination spread.

Regional Insights

Based on Region, North America emerged as the dominant region in the Global Salmonella Testing Market in 2023. In North America, there is a significant incidence of foodborne illnesses attributed to Salmonella contamination. This heightened prevalence underscores the demand for effective testing methods aimed at detecting and preventing outbreaks, thereby safeguarding public health. Recent data from the Centers for Disease Control and Prevention reveal that approximately 48 million people in the U.S. fall ill, with 128,000 hospitalized and 3,000 fatalities annually due to foodborne diseases. The United States, specifically, maintains stringent regulatory oversight through bodies such as the Food and Drug Administration (FDA) and the United States Department of Agriculture (USDA). These agencies enforce rigorous food safety regulations that necessitate routine testing for Salmonella and other pathogens in food products to ensure consumer safety. North America benefits from advanced healthcare infrastructure and robust diagnostic capabilities. State-of-the-art laboratories equipped with molecular-based testing technologies like PCR and NGS enable rapid and precise detection of Salmonella. Consumer awareness of food safety issues is high in North America, driving a strong preference for safe and high-quality food products. This consumer demand incentivizes food producers to invest in stringent testing protocols and innovative technologies to uphold consumer trust. In 2023, scientists at the U.S. Food and Drug Administration's Center for Veterinary Medicine (CVM) developed a new method using Loop-mediated isothermal amplification (LAMP) for Salmonella testing in animal food. This advancement underscores the critical importance of product testing to ensure the safety of consumers, pets, and other animals from foodborne infections. Ongoing advancements in molecular testing methods, automation, and data analysis continually improve the efficiency, sensitivity, and throughput of Salmonella testing processes in North America, further enhancing food safety standards and public health protection.

Key Market Players

Thermo Fisher Scientific Inc.

BioMérieux SA

Merck KGaA

QIAGEN N.V.

Eurofins Scientific

Hardy Diagnostics

PerkinElmer AES

Mylab Discovery Solutions Pvt. Ltd.

Abbott Laboratories Inc.

Biomerica, Inc.

Report Scope:

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

Salmonella Testing Market, By Testing Method:

Culture-based Methods

Molecular-based Methods

Immunoassays

Salmonella Testing Market, By Sample Type:

Food

Water

Environmental Surfaces

· Salmonella Testing Market, By End User:

Food Producers and Manufacturers

Contract Testing Laboratories

Government and Regulatory Bodies

Others

Salmonella 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 presents in the Global Salmonella Testing Market.

Available Customizations:

Global Salmonella 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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