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Infectious Disease Diagnostics Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Infectious Disease Diagnostics Market Report

The infectious disease diagnostics market by revenue is expected to grow at a CAGR of over 7% during the period 2019–2025.

The global infectious disease diagnostics market, which is one of the major segments in the global in-vitro diagnostics market, is likely to grow at a steady rate during the forecast period. The growth can be attributed to the growing prevalence/incidence of several infectious diseases. Malaria continues to be a major cause of death in the Middle East and Africa. The market is witnessing growth due to the increase in the usage of diagnostic tests for several purposes, including routine health checkups, infectious diseases, seasonal flu. Improvements in technology such as the introduction of automated analyzers, advanced devices with high throughput with reduced waiting time and point-of-care diagnostics, and the ability to perform a large volume of tests in a shorter duration of time are fueling the growth of the infectious disease diagnostics market across the globe.

The following factors are likely to contribute to the growth of the infectious disease diagnostics market during the forecast period:

High Growth Potential in LMICs

Increasing Demand for Molecular Diagnostics

Strategic Merges and Acquisitions

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Increased Prevalence of infectious Diseased Globally

The study considers the present scenario of the infectious disease diagnostics market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Infectious Disease Diagnostics Market Segmentation

The global infectious disease diagnostics research report includes a detailed segmentation by products, disease, end-user, test, and geography. In 2019, the traditional diagnostics segment accounted for 66% of the infectious disease diagnostics market share. The segment is growing at a moderate rate than molecular diagnostics. Traditional diagnostics include immunodiagnostics, blood culture tests, and clinical microbiological methods to diagnose several diseases. However, the molecular segment is rapidly capturing the revenue share of the traditional segment. Molecular diagnostic tests are based on DNA amplification techniques. They have comparatively higher sensitivity and specificity than immunoassays. Most tests are based on real-time PCR. However, these tests are comparatively complex and expensive.

The tuberculosis (TB) segment is expected to be one of the major revenue contributors by 2025. By the end of 2018, around 10 million people were infected with TB, including 5.7 million men, 3.2 million women, and 1.1 million children. Therefore, the increasing burden of TB disease across the world, especially in India, China, South Africa, and Bangladesh constituting a significant percentage of TB cases is likely to influence the segment growth.

The hepatitis segment is likely to grow at a CAGR of over 4% during the period 2019–2025. The staggering rise in liver damage cases due to viral infections, drug and chemical abuses, and an increase in alcohol intake, is contributing to the growth of the segment. The presence of a high pool of infected patients, who are undiagnosed and need urgent diagnosis is another driver influencing the segment growth.

The hospital end-user segment dominated the infectious disease diagnostics market shares and accounted for the highest share of over 34% in 2019 due to the high volume of infectious disease diagnosis and treatment performed in these settings. The increase

in the number of private hospitals, which have their own central laboratories performing a high volume of tests is a major factor influencing the market growth. Standard reference laboratories accounted for a share of 33% share. The number of standard reference laboratories (both private and public run labs) is increasing in large cities and urban areas of developing countries and in developed countries due to an increase in epidemic conditions and the rise in prevalence of several infectious diseases such as malaria, dengue, and HIV. The demand for diagnosis is higher and plays an important role to prevent the spread of acute diseases and take immediate preventive measures as well as help in making important clinical decisions regarding treatment regimens. Public health laboratories accounted for a share of 12% in the end-user segment.

In 2019, the consumables segment accounted for 74% in the global infectious disease diagnostics market shares. The increasing share of consumables is due to the usage of a wide array of several standard reagents and test kits to perform various tests catering to the need of end-users. The usage of consumables is reoccurring in nature, the consumables segment generates continuous revenue for vendors.

Segmentation by Products

- Instruments/ Analyzers & Software
- Consumables

Segmentation by Disease

- Hepatitis
- AIDS
- HAIs
- Influenza
- Tuberculosis
- Malaria
- HPV Infection

Sepsis

Dengue

Other Diseases

Segmentation by End-user

Hospitals

Standard Reference Laboratories

Public Health Laboratories

Blood Banks

Acute Care Settings

Others

Segmentation by Test

Traditional Diagnostics

Molecular Diagnostics

INSIGHTS BY GEOGRAPHY

APAC is expected to grow at the highest CAGR of over 8% during the period 2019–2025. The region is witnessing the highest growth rate due to the high prevalence of infectious diseases in countries such as China, India, Japan, Australia, and South Korea. It is home to more than half of the world's population and the bulk of this population is still hugely underserved. The region is made up of diverse countries with varying needs. There are certain countries whose healthcare segment is developed, and a few countries' healthcare systems are still in infancy. However, the diagnostics

market will have a high growth rate in this region due to the increase in infectious disease, combined with the aging population which has put immense pressure on the healthcare resources in the region.

Segmentation by Geography

- North America
  - US
  - Canada
- Europe
  - UK
  - Germany
  - France
  - Italy
  - Spain
- APAC
  - China
  - Japan
  - South Korea
  - Australia
  - India
- Latin America
  - Brazil

Mexico

Argentina

Middle East & Africa

South Africa

Saudi Arabia

Turkey

Iran

INSIGHTS BY VENDORS

The global infectious disease diagnostics industry is highly dynamic with the presence of several global and local players offering a diverse range of instruments/analyzers and reagents. Abbott, BD, bioM?rieux, Bio-Rad Laboratories, Danaher, F. Hoffmann-La Roche, Luminex, Quidel, and Thermo Fisher Scientific are the leading players and accounted for significant shares in the market. Global players are focusing on developing innovative products and expanding their product portfolio to remain competitive in the market. They are investing extensively in R&D and product development activities to expand their product portfolio.

Prominent Vendors

Abbott

BD

bioM?rieux

Hoffmann-La Roche

Thermo Fisher Scientific

Quidel

Luminex

Danaher

Bio-Rad Laboratories

Other Prominent Vendors

Meridian Bioscience

DiaSorin Molecular

Accelerate Diagnostics

Trinity Biotech

OpGen

QIAGEN

Siemens Healthineers

caviid

EIKEN CHEMICAL

Epitope Diagnostics Inc.

EUROIMMUN

Genetic Signatures

Hologic

Oxford Immunotec

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KEY QUESTIONS ANSWERED

1. What is the infectious disease diagnostics market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the global infectious disease diagnostics market shares?
3. Which product type/end-users/region is generating the largest revenue in the North America region?
4. Who are the leading vendors in infectious disease diagnostics market, and what are their market shares?
5. How is the growth of the hospitals segment influencing the growth of the infectious disease diagnostics market?

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