

India Emerging Infectious Disease Diagnostics Market: Focus on Epidemiology, Application, Technology, Type of Infection, Disease Type, and End User - Analysis and Forecast, 2023-2033

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Abstracts

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India Emerging Infectious Disease Diagnostics Market Overview

The India emerging infectious disease diagnostics market is projected to experience substantial growth over the forecast period 2023-2033. Moreover, the market value for 2022 was estimated to be \$339.1 million and is expected to reach \$982.7 million by 2033, showcasing a CAGR of 10.29% during the forecast period.

Market Lifecycle Stage

The India emerging infectious disease diagnostics market is in an emerging phase. Recent years have seen improvements and innovations in diagnostic methods, particularly with the advent of next-generation sequencing and the growing demand for rapid testing (such as in the case of the COVID-19 pandemic). New technologies and devices that offer faster, more efficient, or more cost-effective extraction could rejuvenate the market and push it back toward a growth phase.

Industry Impact

The India emerging infectious disease diagnostics market has proven to be a cornerstone in the evolution of modern biotechnology, clinical diagnostics, and research of different pathogens. Infectious disease diagnostics have a significant impact on

various aspects of healthcare and public health. Here are some key impacts:

Accurate and Timely Diagnosis: Infectious disease diagnostics enable healthcare providers to accurately identify the causative agents of infections, leading to timely and appropriate treatment. Early diagnosis helps improve patient outcomes, reduce morbidity and mortality rates, and prevent the spread of infectious diseases.

Effective Patient Management: Diagnostic tests provide critical information for healthcare providers to guide patient management strategies. These tests help determine the most effective treatment options, including the selection of appropriate antimicrobial therapies and the implementation of infection control measures. This leads to better patient care and improved healthcare outcomes.

Public Health Surveillance and Outbreak Control: Infectious disease diagnostics play a crucial role in public health surveillance. By identifying and monitoring infectious agents, diagnostic tests contribute to the detection and tracking of disease outbreaks. This information helps public health authorities implement timely interventions, such as contact tracing, isolation measures, and targeted vaccination campaigns, to control the spread of infections.

Research and Development: Infectious disease diagnostics drive research and development efforts to improve existing diagnostic methods and develop new technologies. Ongoing advancements in diagnostics contribute to the discovery of novel biomarkers, the enhancement of diagnostic accuracy and sensitivity, and the integration of innovative approaches such as molecular techniques, biosensors, and artificial intelligence.

Market Segmentation:

Segmentation 1: by Application

Laboratory Testing

Point-of-Care Testing

Laboratory Testing to Dominate the India Emerging Infectious Disease Diagnostics Market (by Application)

Based on application, the laboratory testing segment dominated the India emerging infectious disease diagnostics market in FY2022. Laboratory testing plays a crucial role in the diagnosis and management of infectious diseases. It involves the analysis of patient samples, such as blood, urine, sputum, or tissue, to detect the presence of infectious agents. Microbiological culture is a common technique that involves incubating patient samples on specific growth media to isolate and identify bacteria, fungi, or parasites, which can then be visualized through microscopy.

Segmentation 2: by Technology

Polymerase Chain Reaction (PCR)

Isothermal Nucleic Acid Amplification Technology (INAAT)

Next-Generation Sequencing (NGS)

Immunodiagnosics

Other Technologies

PCR to Dominate the India Emerging Infectious Disease Diagnostics Market (by Technology)

Based on technology, the India emerging infectious disease diagnostics market was dominated by the PCR segment in FY2022. Nowadays, PCR is usually used in several laboratories around the world, as it amplifies DNA further, allowing the analysis of even small amounts of nucleic acid. With growing technological advancements in molecular biology techniques, PCR has been utilized in several fields, including disease diagnosis, DNA profiling, precision medicine, and gene expression.

Next-generation sequencing (NGS) has revolutionized infectious disease diagnosis by enabling comprehensive and high-throughput analysis of pathogen genomes. Whole genome sequencing (WGS) allows the sequencing of entire pathogen genomes, providing detailed information about genetic variations, antimicrobial resistance genes, and virulence factors. It can identify and characterize pathogens, track outbreaks, and analyze their evolutionary patterns.

Other emerging technologies anticipated to register significant growth include

technologies such as digital PCR, INAAT, and clustered regularly interspaced short palindromic repeats (CRISPR).

Digital PCR is an advanced molecular diagnostic technique used for infectious disease diagnostics. It enables the absolute quantification of target nucleic acids by partitioning the PCR reaction into thousands of individual reactions.

INAAT has emerged as a valuable tool for infectious disease diagnostics. INAAT includes technologies such as loop-mediated isothermal amplification (LAMP) and recombinase polymerase amplification (RPA), which enable rapid and sensitive detection of pathogens without the need for complex equipment or multiple temperature cycles.

CRISPR is a relatively new technology, and while it has been leveraged for gene editing and therapeutic purposes ever since the invention of CRISPR/Cas9 gene editing in 2011, it was only in 2016 that CRISPR-Cas systems were first developed to identify nucleic acids for molecular diagnostics.

Segmentation 3: by Type of Infection

Bacterial

Viral

Fungal

Other Infections (Parasitic etc)

Bacterial and Viral Segments to Dominate the India Emerging Infectious Disease Diagnostics Market (by Type of Infection)

Based on type of infection, bacterial infectious disease diagnosis involves various methods and techniques to identify the presence of bacterial pathogens in clinical samples. Some of the common bacterial infections include respiratory infections such as tuberculosis and streptococcal infections and sexually transmitted infections (STIs) such as chlamydia, gonorrhea, and syphilis.

Viruses have the ability to mutate and, therefore, can lead to the re-emergence of diseases even after one form of the virus has been eradicated or managed. Molecular diagnostic companies are therefore focused on developing tests that can detect a wide range of viruses. Some of the common infections caused by viruses include influenza, genital herpes, COVID-19, hepatitis, mumps, rubella, gastroenteritis, Zika disease, and ebola disease, among others.

Segmentation 4: by Disease Type

Respiratory Infections

Gastrointestinal Infections

Sexually Transmitted Infections (STIs)

Neurological Infections

Post-Transplant Infections

Other Infections

Respiratory Infections to Dominate the India Emerging Infectious Disease Diagnostics Market (by Disease Type)

A vast majority of molecular diagnostic companies offer tests for various kinds of bacteria and viruses responsible for causing respiratory infections. Moreover, the COVID-19 pandemic led to the development of a wide range of tests employing conventional technologies such as reverse transcriptase PCR (RT-PCR) and even leveraging emerging technologies such as RT-LAMP and CRISPR. Several companies now offer multiplex assays that test for influenza A, influenza B, respiratory syncytial virus (RSV), and SARS-CoV-2 virus.

Segmentation 5: by End User

Hospitals and Clinics

Diagnostic Laboratories

Other End Users

Hospitals and Clinics and Diagnostic Laboratories to Dominate the India Emerging Infectious Disease Diagnostics Market (by End User)

Based on end users, the hospitals and clinics and diagnostic laboratories segments accounted for the largest share of the India emerging infectious disease diagnostics market in FY2022. Hospitals and clinics play a critical role in the field of infectious disease diagnostics, serving as important centers for patient evaluation and testing. In addition to point-of-care testing (POCT), which provides immediate results for rapid diagnosis and management, hospitals and clinics may also rely on laboratory testing for comprehensive analysis. Some healthcare facilities have on-site laboratories equipped with state-of-the-art diagnostic technologies, while others collaborate with external diagnostic laboratories for specialized testing. These laboratory facilities employ various methods, including molecular techniques such as PCR and sequencing, serological assays, and culture-based methods to identify and characterize infectious agents accurately.

Recent Developments in the India Emerging Infectious Disease Diagnostics Market

In February 2023, Thermo Fisher Scientific Inc. and Mylab announced a pact on test kits for infectious diseases.

In February 2023, Biotech startup CrisprBits raised \$250,000 in a pre-seed funding round to support the development and commercialization of its CRISPR-based tests.

In February 2023, the Food and Drug Administration (FDA) authorized the Xpert Mpx test by Cepheid (parent: DANAHER CORPORATION) for emergency use.

In August 2022, Bio-Rad Laboratories, Inc. acquired Curiosity Diagnostics to gain access to PCR ONE, a technology being developed by Curiosity Diagnostics, which can quickly detect a broad range of pathogens.

In June 2021, Hologic, Inc. completed the acquisition of Mobidiag to expand its capabilities in molecular diagnostics.

In January 2023, CrisprBits developed India's first CRISPR-based SARS-CoV-2

test with Omicron detection.

In March 2023, an India-based startup, Mylab Discovery Solutions Pvt. Ltd., entered into a joint venture with AstraGene LLC, the U.A.E.'s first molecular diagnostics manufacturing company to develop molecular diagnostics in the U.A.E. and Kuwait.

In November 2022, Bio-Rad Laboratories, Inc. and NuProbe entered into an exclusive licensing agreement for digital PCR applications.

Demand – Drivers, Restraints, and Opportunities

Market Drivers:

Rising Incidence of Emerging Infectious Diseases in India: The incidence of emerging infectious diseases in India has witnessed a steady rise in recent years, contributing significantly to the expansion of the country's emerging infectious disease diagnostics market. India emerging infectious disease diagnostics market has experienced substantial growth due to multiple factors. In addition to increased awareness and government initiatives, the country's past encounters with outbreaks such as Zika, Nipah, and the COVID-19 pandemic have underscored the critical importance of preparedness. As a result, hospitals, laboratories, and healthcare institutions have been channeling resources into advanced diagnostic technologies to detect emerging infectious diseases swiftly and accurately.

Market Restraints:

Inadequate Healthcare Infrastructure and Facilities: The India emerging infectious disease diagnostics market faces significant constraints due to inadequate healthcare infrastructure and facilities. These challenges could have a substantial impact on the ability to effectively diagnose and manage infectious diseases in the country.

For instance, the presence of limited healthcare infrastructure in many parts of India, particularly in rural and remote areas, poses a significant hurdle. These regions often lack well-equipped laboratories and diagnostic facilities, making it difficult to conduct timely and accurate diagnostic tests. As a result, individuals in these underserved areas may not have access to the diagnostics they need, which can lead to delayed diagnoses and increased disease transmission.

Market Opportunities:

Development of Technologically Advanced Platforms in India for Diagnosis: The development of technologically advanced diagnostic platforms in India represents a significant opportunity for players in the emerging infectious disease diagnostics market. The development of advanced diagnostic platforms can help address some of the existing constraints in the healthcare system, such as inadequate healthcare infrastructure and limited access to diagnostics in rural and remote areas.

These advancements include the development of molecular diagnostics, point-of-care testing, immunoassays, and automated systems, among others. These advancements also provide rapid and accurate results, enabling healthcare professionals to make timely treatment decisions.

How can this report add value to an organization?

Workflow/Innovation Strategy: The India emerging infectious disease diagnostics market has been extensively segmented on the basis of various categories, such as application, technology, type of infection, disease type, end user, and region. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

Growth/Marketing Strategy: In the India emerging infectious disease diagnostics market product launches, upgradations, and approvals accounted for the maximum number of key developments, i.e., over 75.89% of the total developments in the India emerging infectious disease diagnostics market, as of September 2023.

Competitive Strategy: The India emerging infectious disease diagnostics market is fragmented with several established as well as emerging players. Key players in the India emerging infectious disease diagnostics market analyzed and profiled in the study involve established players that offer various kinds of molecular diagnostic tests for infectious diseases.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2022. The

historical year analysis has been done from FY2020 to FY2021, and the market size has been calculated for FY2022 and projected for the period 2023-2033.

The geographical distribution of the market revenue is estimated to be the same as the company's net revenue distribution. All the numbers are adjusted off to two digits after decimal for report presentation reasons. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. CAGR is calculated from 2023 to 2033.

The market has been mapped based on different types of products available in the market and based on several indications. All the key companies that have a significant number of offerings to the India emerging infectious disease diagnostics market have been considered and profiled in the report.

In the study, the primary respondent's verification has been considered to finalize the estimated market for the India emerging infectious disease diagnostics market.

The latest annual reports of each market player have been taken into consideration for market revenue calculation.

Market strategies and developments of key players have been considered for the calculation of sub-segment split.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year. The currency conversion rate has been taken from the historical exchange rate of the Oanda website or from the annual reports of the respective company if stated.

Primary Research

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding of the numbers of the various markets for market type

Secondary Research

Open Sources

National Center for Biotechnology Information (NCBI), PubMed, Science Direct, World Bank Group, Organisation for Economic Co-operation and Development (OECD), Centers for Disease Control and Prevention (CDC), Global Burden Disease (GBD), World Health Organization (WHO), and Indian Council of Medical Research (ICMR)

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolio

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentations, split-ups, and percentage shares

Data for market value

Key industry trends of the top players in the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

Infectious disease diagnostics encompass a range of methods and techniques used to identify and detect infectious agents in individuals suspected of having an infection. These diagnostics play a vital role in timely diagnosis and accuracy, enabling appropriate treatment decisions and public health interventions.

There are two major approaches in the field; one is microbiological culture, which is a fundamental approach in which patient specimens are cultured on specialized growth media to isolate and identify specific pathogens. This technique allows for the determination of the causative organism and the assessment of its antimicrobial susceptibility. Molecular diagnostics, another important approach, utilizes techniques such as polymerase chain reaction (PCR) and nucleic acid amplification tests (NAATs) to detect the genetic material of the infectious agent. This enables highly sensitive and specific identification of pathogens, even at low concentrations.

Some of the prominent companies in this market are:

Abbott Laboratories

Becton, Dickinson and Company

bioMérieux S.A.

Bio-Rad Laboratories, Inc.

Co-Diagnostics, Inc.

DANAHER CORPORATION

DiaSorin S.p.A.

F. Hoffmann-La Roche Ltd

Hologic, Inc.

QIAGEN N.V.

Thermo Fisher Scientific Inc.

Siemens Healthineers AG

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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