

Global ASEAN Point of Care Diagnostics Market Size study & Forecast, by Product (Infectious Disease (TB, Hepatitis, STDs, HAIs), Glucose, Cardiometabolic, Pregnancy, Coagulation), by Technology (Lateral Flow Assays, Biochemistry, MDx), by End User (Home Care, Hospitals), and Regional Forecasts 2025-2035

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Abstracts

The Global ASEAN Point of Care Diagnostics Market is valued at approximately USD 1.03 billion in 2024 and is expected to register a promising compound annual growth rate (CAGR) of 4.70% over the forecast period from 2025 to 2035. Point of Care (PoC) Diagnostics has emerged as a pivotal enabler of decentralized healthcare delivery—empowering clinicians and patients alike with rapid diagnostic insights, often at the bedside or in near-patient settings. As ASEAN nations experience a surge in both urbanization and rural healthcare needs, PoC technologies are uniquely positioned to bridge gaps in access, responsiveness, and affordability. Whether addressing infectious diseases or chronic metabolic conditions, the real-time data rendered by these tools is reshaping clinical pathways and policy direction across Southeast Asia.

What's fueling this momentum is the increasing burden of both communicable and non-communicable diseases, along with a parallel surge in awareness regarding early diagnosis and preventive care. The ASEAN region is witnessing a sharp rise in the demand for accessible, compact, and user-friendly diagnostic devices that can function even in low-resource environments. This, combined with advancements in molecular diagnostics and the integration of digital health infrastructure, is enabling a new generation of smart, portable PoC devices. Governments across ASEAN are also recognizing the utility of these solutions in pandemic preparedness, primary care reinforcement, and health equity expansion—creating fertile ground for innovation and

investment.

From a regional perspective, Southeast Asia is undergoing a healthcare transformation. Countries like Singapore and Malaysia are investing heavily in precision diagnostics and digital health ecosystems, while Indonesia, Vietnam, and the Philippines are scaling their rural and public health infrastructures. These nations are leveraging PoC diagnostics to offset the limitations of centralized laboratory systems—particularly in remote or underserved regions. Meanwhile, Thailand’s thriving medical tourism and diagnostic manufacturing sectors have further enhanced regional production and cross-border technology transfers. The ASEAN bloc’s regulatory harmonization efforts and incentives for healthcare technology startups are also expected to accelerate cross-market adoption during the forecast period.

Major market player included in this report are:

Abbott Laboratories

Siemens Healthineers

F. Hoffmann-La Roche Ltd

Thermo Fisher Scientific Inc.

bioMérieux SA

Becton, Dickinson and Company

Danaher Corporation

QuidelOrtho Corporation

EKF Diagnostics Holdings plc

Nova Biomedical Corporation

Instrumentation Laboratory (Werfen)

Trinity Biotech

Sekisui Diagnostics LLC

PTS Diagnostics

Bio-Rad Laboratories, Inc.

Global ASEAN Point of Care Diagnostics Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Product:

Infectious Disease

TB

Hepatitis

STDs

HAIs

Glucose

Cardiometabolic

Pregnancy

Coagulation

By Technology:

Lateral Flow Assays

Biochemistry

Molecular Diagnostics (MDx)

By End User:

Home Care

Hospitals

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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