

Global IVD Microspheres Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global IVD Microspheres market size is expected to reach \$ 665 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Product definition explains why IVD Microspheres should be treated as a strategic material platform rather than a simple consumable category. IVD Microspheres function simultaneously as solid supports, signal carriers, enrichment media, separation tools, calibration standards, and multiplex coding particles. In commercial terms, they shape assay kinetics, lot-to-lot consistency, automation compatibility, and long-term stability. The real competitive threshold is no longer the ability to synthesize a bead; it is the ability to deliver a validated, scalable, and transferable bead solution across multiple assay architectures. This is why customers focus on particle-size distribution, surface functionality, magnetic response, fluorescence uniformity, non-specific binding control, and change-management discipline. Merck, Thermo Fisher, JSR Corporation (Tokuyama), Cytiva (Danaher), and Bangs Laboratories (Ott Scientific) remain the reference suppliers because product performance, process robustness, and customer validation systems are tightly integrated.

In 2025, the top five suppliers accounted for about 54.8% of industry revenue, and the top three for roughly 42.0%. The top-five volume share was lower, at around 43.8%, which points to stronger pricing power at the high end of magnetic, functionalized, and customer-validated bead portfolios.

The supplier landscape has moved into a two-layer structure, with global leaders controlling the premium tier and regional specialists gaining share through faster localization. Merck, Thermo Fisher, JSR Corporation (Tokuyama), Cytiva (Danaher), and Bangs Laboratories (Ott Scientific) continue to lead across magnetic beads,

polymer microspheres, advanced surface chemistries, and OEM co-development. A second layer includes Fujikura Kasei, BD (Waters), Agilent, VirionSerion, Ademtech, Magtivio, Chemicell, CD Bioparticles, and IKERLAT Polymers, typically with narrower product focus or regional depth. Chinese players have become materially more relevant. Suzhou Vdo Biotech, Suzhou Beaver Biomedical Engineering, Nanjing Nanoeast Biological Technology, Sunresin, Suzhou Knowledge & Benefit Sphere Tech, Suzhou Nanomicro Technology, Shanghai Allrun Nano Science & Technology, and Shanghai Nahong Microsphere Technology are moving from selective import substitution toward broader platform participation. Among them, Suzhou Vdo Biotech and Suzhou Beaver Biomedical Engineering stand out for stronger commercialization depth and wider customer engagement.

Regional dynamics show that demand concentration and manufacturing expansion are increasingly shifting toward Asia, while premium validation standards still sit largely with North America, Europe, and Japan. By consumption region in 2025, Asia-Pacific held 34.68% of global volume, ahead of North America at 31.50% and Europe at 24.67%. By production region, North America held 34.50%, Europe 22.05%, China 17.54%, and Japan 16.55%. The more important signal is forward growth: China's production CAGR reaches 11.38% for 2026-2032, well above North America, Europe, and Japan. That implies a continuing rise in China's role across standard magnetic beads, nucleic-acid extraction beads, chemiluminescent immunoassay beads, and functionalized polymer microspheres. The competitive pattern is therefore evolving from import substitution to a broader contest over quality systems, validation speed, supply resilience, and cost-performance balance.

Product segmentation clearly identifies where value is accumulating. Magnetic microspheres accounted for roughly 68.3% of 2025 volume and 73.6% of revenue, confirming their status as the core product class in IVD Microspheres. Non-magnetic particles remain commercially relevant, but industry gravity has shifted toward magnetic systems as automation, CLIA, and molecular pre-processing continue to deepen. From a materials perspective, polymer microspheres remain the largest base category with about 66.3% of volume in 2025, but silica microspheres contributed 31.6% of revenue and achieved an average price of USD 318 per gram, well above the USD 238 per gram for polymer microspheres. That price premium confirms the stronger value density of silica-linked extraction workflows, high-end surface chemistry, and advanced separation performance. IVD Microspheres are no longer priced as discrete particles alone; they are priced as a combination of material system, surface design, application fit, and process support.

Applications define where volume, value, and customer stickiness come from. In 2025, nucleic-acid extraction and molecular pre-processing remained the largest volume segment with about 29.7% of total demand and 27.7% of revenue. Chemiluminescent immunoassay accounted for 24.9% of revenue and remained one of the most attractive value pools. Lateral flow and immunofluorescence POCT represented about 16.7% of volume and continued to grow rapidly, with a 2026-2032 CAGR of 8.14%. Flow cytometry, multiplex detection, and QC/calibration remained smaller in volume but structurally attractive because of tighter validation lock-in. Commercially, the growth profile of IVD Microspheres is no longer tied to a single event-driven application. It is being supported by the installed-base expansion of extraction workflows, the value intensity of CLIA, the channel expansion of POCT, and the gradual scaling of multiplex and QC-linked systems.

This report studies the global IVD Microspheres production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for IVD Microspheres and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of IVD Microspheres that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global IVD Microspheres total production and demand, 2021-2032, (Kg)

Global IVD Microspheres total production value, 2021-2032, (USD Million)

Global IVD Microspheres production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kg), (based on production site)

Global IVD Microspheres consumption by region & country, CAGR, 2021-2032 & (Kg)

U.S. VS China: IVD Microspheres domestic production, consumption, key domestic manufacturers and share

Global IVD Microspheres production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kg)

Global IVD Microspheres production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

Global IVD Microspheres production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

This report profiles key players in the global IVD Microspheres market based on the following parameters - company overview, production, value, price, gross margin,

product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Merck, Thermo Fisher, JSR Life Sciences (Tokuyama), Cytiva (Danaher), Bangs Laboratories (Ott Scientific), Fujikura Kasei, BD (Waters), Agilent, VirionSerion, Ademtech, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World IVD Microspheres market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kg) and average price (USD/g) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global IVD Microspheres Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IVD Microspheres Market, Segmentation by Type:

Magnetic Type

Non-magnetic Type

Global IVD Microspheres Market, Segmentation by Material:

Polymer Microsphere (PS/PMMA, etc)

Silica Microsphere

Others

Global IVD Microspheres Market, Segmentation by Particle Size:

Below 1µm

1-5µm

Above 5µm

Global IVD Microspheres Market, Segmentation by Application:

Nucleic Acid Extraction/Molecular Diagnostic Pretreatment

Chemiluminescent Immunoassay (CLIA)

Lateral Chromatography/Immunofluorescence Point-of-Care Testing (POCT)

Immunoturbidimetry/Latex Agglutination

Flow Cytometry/Multiplex Analysis/Calibration and Quality Control

Others

Companies Profiled:

Merck

Thermo Fisher

JSR Life Sciences (Tokuyama)

Cytiva (Danaher)

Bangs Laboratories (Ott Scientific)

Fujikura Kasei

BD (Waters)

Agilent

VirionSerion

Ademtech

Magtivio

Chemicell

CD Bioparticles

IKERLAT Polymers

Suzhou Vdo Biotech

Suzhou Beaver Biomedical Engineering

Nanjing Nanoeast Biological Technology

Sunresin

Suzhou Knowledge & Benefit Sphere Tech

Suzhou Nanomicro Technology

Shanghai Allrun Nano Science & Technology

Shanghai Nahong Microsphere Technology

Key Questions Answered:

1. How big is the global IVD Microspheres market?
2. What is the demand of the global IVD Microspheres market?
3. What is the year over year growth of the global IVD Microspheres market?
4. What is the production and production value of the global IVD Microspheres market?
5. Who are the key producers in the global IVD Microspheres market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 IVD Microspheres Introduction
- 1.2 World IVD Microspheres Supply & Forecast
 - 1.2.1 World IVD Microspheres Production Value (2021 & 2025 & 2032)
 - 1.2.2 World IVD Microspheres Production (2021-2032)
 - 1.2.3 World IVD Microspheres Pricing Trends (2021-2032)
- 1.3 World IVD Microspheres Production by Region (Based on Production Site)
 - 1.3.1 World IVD Microspheres Production Value by Region (2021-2032)
 - 1.3.2 World IVD Microspheres Production by Region (2021-2032)
 - 1.3.3 World IVD Microspheres Average Price by Region (2021-2032)
 - 1.3.4 North America IVD Microspheres Production (2021-2032)
 - 1.3.5 Europe IVD Microspheres Production (2021-2032)
 - 1.3.6 China IVD Microspheres Production (2021-2032)
 - 1.3.7 Japan IVD Microspheres Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 IVD Microspheres Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 IVD Microspheres Major Market Trends

2 DEMAND SUMMARY

- 2.1 World IVD Microspheres Demand (2021-2032)
- 2.2 World IVD Microspheres Consumption by Region
 - 2.2.1 World IVD Microspheres Consumption by Region (2021-2026)
 - 2.2.2 World IVD Microspheres Consumption Forecast by Region (2027-2032)
- 2.3 United States IVD Microspheres Consumption (2021-2032)
- 2.4 China IVD Microspheres Consumption (2021-2032)
- 2.5 Europe IVD Microspheres Consumption (2021-2032)
- 2.6 Japan IVD Microspheres Consumption (2021-2032)
- 2.7 South Korea IVD Microspheres Consumption (2021-2032)
- 2.8 ASEAN IVD Microspheres Consumption (2021-2032)
- 2.9 India IVD Microspheres Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World IVD Microspheres Production Value by Manufacturer (2021-2026)

- 3.2 World IVD Microspheres Production by Manufacturer (2021-2026)
- 3.3 World IVD Microspheres Average Price by Manufacturer (2021-2026)
- 3.4 IVD Microspheres Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global IVD Microspheres Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for IVD Microspheres in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for IVD Microspheres in 2025
- 3.6 IVD Microspheres Market: Overall Company Footprint Analysis
 - 3.6.1 IVD Microspheres Market: Region Footprint
 - 3.6.2 IVD Microspheres Market: Company Product Type Footprint
 - 3.6.3 IVD Microspheres Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: IVD Microspheres Production Value Comparison
 - 4.1.1 United States VS China: IVD Microspheres Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: IVD Microspheres Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: IVD Microspheres Production Comparison
 - 4.2.1 United States VS China: IVD Microspheres Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: IVD Microspheres Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: IVD Microspheres Consumption Comparison
 - 4.3.1 United States VS China: IVD Microspheres Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: IVD Microspheres Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based IVD Microspheres Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based IVD Microspheres Manufacturers, Headquarters and Production Site (States, Country)

- 4.4.2 United States Based Manufacturers IVD Microspheres Production Value (2021-2026)
- 4.4.3 United States Based Manufacturers IVD Microspheres Production (2021-2026)
- 4.5 China Based IVD Microspheres Manufacturers and Market Share
- 4.5.1 China Based IVD Microspheres Manufacturers, Headquarters and Production Site (Province, Country)
- 4.5.2 China Based Manufacturers IVD Microspheres Production Value (2021-2026)
- 4.5.3 China Based Manufacturers IVD Microspheres Production (2021-2026)
- 4.6 Rest of World Based IVD Microspheres Manufacturers and Market Share, 2021-2026
- 4.6.1 Rest of World Based IVD Microspheres Manufacturers, Headquarters and Production Site (State, Country)
- 4.6.2 Rest of World Based Manufacturers IVD Microspheres Production Value (2021-2026)
- 4.6.3 Rest of World Based Manufacturers IVD Microspheres Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World IVD Microspheres Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Magnetic Type
 - 5.2.2 Non-magnetic Type
- 5.3 Market Segment by Type
 - 5.3.1 World IVD Microspheres Production by Type (2021-2032)
 - 5.3.2 World IVD Microspheres Production Value by Type (2021-2032)
 - 5.3.3 World IVD Microspheres Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY MATERIAL

- 6.1 World IVD Microspheres Market Size Overview by Material: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Material
 - 6.2.1 Polymer Microsphere (PS/PMMA, etc)
 - 6.2.2 Silica Microsphere
 - 6.2.3 Others
- 6.3 Market Segment by Material
 - 6.3.1 World IVD Microspheres Production by Material (2021-2032)
 - 6.3.2 World IVD Microspheres Production Value by Material (2021-2032)
 - 6.3.3 World IVD Microspheres Average Price by Material (2021-2032)

7 MARKET ANALYSIS BY PARTICLE SIZE

7.1 World IVD Microspheres Market Size Overview by Particle Size: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Particle Size

7.2.1 Below 1µm

7.2.2 1-5µm

7.2.3 Above 5µm

7.3 Market Segment by Particle Size

7.3.1 World IVD Microspheres Production by Particle Size (2021-2032)

7.3.2 World IVD Microspheres Production Value by Particle Size (2021-2032)

7.3.3 World IVD Microspheres Average Price by Particle Size (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World IVD Microspheres Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Nucleic Acid Extraction/Molecular Diagnostic Pretreatment

8.2.2 Chemiluminescent Immunoassay (CLIA)

8.2.3 Lateral Chromatography/Immunofluorescence Point-of-Care Testing (POCT)

8.2.4 Immunoturbidimetry/Latex Agglutination

8.2.5 Flow Cytometry/Multiplex Analysis/Calibration and Quality Control

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World IVD Microspheres Production by Application (2021-2032)

8.3.2 World IVD Microspheres Production Value by Application (2021-2032)

8.3.3 World IVD Microspheres Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Merck

9.1.1 Merck Details

9.1.2 Merck Major Business

9.1.3 Merck IVD Microspheres Product and Services

9.1.4 Merck IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Merck Recent Developments/Updates

9.1.6 Merck Competitive Strengths & Weaknesses

9.2 Thermo Fisher

9.2.1 Thermo Fisher Details

9.2.2 Thermo Fisher Major Business

9.2.3 Thermo Fisher IVD Microspheres Product and Services

9.2.4 Thermo Fisher IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Thermo Fisher Recent Developments/Updates

9.2.6 Thermo Fisher Competitive Strengths & Weaknesses

9.3 JSR Life Sciences (Tokuyama)

9.3.1 JSR Life Sciences (Tokuyama) Details

9.3.2 JSR Life Sciences (Tokuyama) Major Business

9.3.3 JSR Life Sciences (Tokuyama) IVD Microspheres Product and Services

9.3.4 JSR Life Sciences (Tokuyama) IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 JSR Life Sciences (Tokuyama) Recent Developments/Updates

9.3.6 JSR Life Sciences (Tokuyama) Competitive Strengths & Weaknesses

9.4 Cytiva (Danaher)

9.4.1 Cytiva (Danaher) Details

9.4.2 Cytiva (Danaher) Major Business

9.4.3 Cytiva (Danaher) IVD Microspheres Product and Services

9.4.4 Cytiva (Danaher) IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Cytiva (Danaher) Recent Developments/Updates

9.4.6 Cytiva (Danaher) Competitive Strengths & Weaknesses

9.5 Bangs Laboratories (Ott Scientific)

9.5.1 Bangs Laboratories (Ott Scientific) Details

9.5.2 Bangs Laboratories (Ott Scientific) Major Business

9.5.3 Bangs Laboratories (Ott Scientific) IVD Microspheres Product and Services

9.5.4 Bangs Laboratories (Ott Scientific) IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Bangs Laboratories (Ott Scientific) Recent Developments/Updates

9.5.6 Bangs Laboratories (Ott Scientific) Competitive Strengths & Weaknesses

9.6 Fujikura Kasei

9.6.1 Fujikura Kasei Details

9.6.2 Fujikura Kasei Major Business

9.6.3 Fujikura Kasei IVD Microspheres Product and Services

9.6.4 Fujikura Kasei IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Fujikura Kasei Recent Developments/Updates

9.6.6 Fujikura Kasei Competitive Strengths & Weaknesses

9.7 BD (Waters)

9.7.1 BD (Waters) Details

9.7.2 BD (Waters) Major Business

9.7.3 BD (Waters) IVD Microspheres Product and Services

9.7.4 BD (Waters) IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 BD (Waters) Recent Developments/Updates

9.7.6 BD (Waters) Competitive Strengths & Weaknesses

9.8 Agilent

9.8.1 Agilent Details

9.8.2 Agilent Major Business

9.8.3 Agilent IVD Microspheres Product and Services

9.8.4 Agilent IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Agilent Recent Developments/Updates

9.8.6 Agilent Competitive Strengths & Weaknesses

9.9 VirionSerion

9.9.1 VirionSerion Details

9.9.2 VirionSerion Major Business

9.9.3 VirionSerion IVD Microspheres Product and Services

9.9.4 VirionSerion IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 VirionSerion Recent Developments/Updates

9.9.6 VirionSerion Competitive Strengths & Weaknesses

9.10 Ademtech

9.10.1 Ademtech Details

9.10.2 Ademtech Major Business

9.10.3 Ademtech IVD Microspheres Product and Services

9.10.4 Ademtech IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Ademtech Recent Developments/Updates

9.10.6 Ademtech Competitive Strengths & Weaknesses

9.11 Magtivio

9.11.1 Magtivio Details

9.11.2 Magtivio Major Business

9.11.3 Magtivio IVD Microspheres Product and Services

9.11.4 Magtivio IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.11.5 Magtivio Recent Developments/Updates
- 9.11.6 Magtivio Competitive Strengths & Weaknesses
- 9.12 Chemicell
 - 9.12.1 Chemicell Details
 - 9.12.2 Chemicell Major Business
 - 9.12.3 Chemicell IVD Microspheres Product and Services
 - 9.12.4 Chemicell IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Chemicell Recent Developments/Updates
 - 9.12.6 Chemicell Competitive Strengths & Weaknesses
- 9.13 CD Bioparticles
 - 9.13.1 CD Bioparticles Details
 - 9.13.2 CD Bioparticles Major Business
 - 9.13.3 CD Bioparticles IVD Microspheres Product and Services
 - 9.13.4 CD Bioparticles IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 CD Bioparticles Recent Developments/Updates
 - 9.13.6 CD Bioparticles Competitive Strengths & Weaknesses
- 9.14 IKERLAT Polymers
 - 9.14.1 IKERLAT Polymers Details
 - 9.14.2 IKERLAT Polymers Major Business
 - 9.14.3 IKERLAT Polymers IVD Microspheres Product and Services
 - 9.14.4 IKERLAT Polymers IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 IKERLAT Polymers Recent Developments/Updates
 - 9.14.6 IKERLAT Polymers Competitive Strengths & Weaknesses
- 9.15 Suzhou Vdo Biotech
 - 9.15.1 Suzhou Vdo Biotech Details
 - 9.15.2 Suzhou Vdo Biotech Major Business
 - 9.15.3 Suzhou Vdo Biotech IVD Microspheres Product and Services
 - 9.15.4 Suzhou Vdo Biotech IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Suzhou Vdo Biotech Recent Developments/Updates
 - 9.15.6 Suzhou Vdo Biotech Competitive Strengths & Weaknesses
- 9.16 Suzhou Beaver Biomedical Engineering
 - 9.16.1 Suzhou Beaver Biomedical Engineering Details
 - 9.16.2 Suzhou Beaver Biomedical Engineering Major Business
 - 9.16.3 Suzhou Beaver Biomedical Engineering IVD Microspheres Product and Services
 - 9.16.4 Suzhou Beaver Biomedical Engineering IVD Microspheres Production, Price,

Value, Gross Margin and Market Share (2021-2026)

9.16.5 Suzhou Beaver Biomedical Engineering Recent Developments/Updates

9.16.6 Suzhou Beaver Biomedical Engineering Competitive Strengths & Weaknesses

9.17 Nanjing Nanoeast Biological Technology

9.17.1 Nanjing Nanoeast Biological Technology Details

9.17.2 Nanjing Nanoeast Biological Technology Major Business

9.17.3 Nanjing Nanoeast Biological Technology IVD Microspheres Product and Services

9.17.4 Nanjing Nanoeast Biological Technology IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Nanjing Nanoeast Biological Technology Recent Developments/Updates

9.17.6 Nanjing Nanoeast Biological Technology Competitive Strengths & Weaknesses

9.18 Sunresin

9.18.1 Sunresin Details

9.18.2 Sunresin Major Business

9.18.3 Sunresin IVD Microspheres Product and Services

9.18.4 Sunresin IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Sunresin Recent Developments/Updates

9.18.6 Sunresin Competitive Strengths & Weaknesses

9.19 Suzhou Knowledge & Benefit Sphere Tech

9.19.1 Suzhou Knowledge & Benefit Sphere Tech Details

9.19.2 Suzhou Knowledge & Benefit Sphere Tech Major Business

9.19.3 Suzhou Knowledge & Benefit Sphere Tech IVD Microspheres Product and Services

9.19.4 Suzhou Knowledge & Benefit Sphere Tech IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Suzhou Knowledge & Benefit Sphere Tech Recent Developments/Updates

9.19.6 Suzhou Knowledge & Benefit Sphere Tech Competitive Strengths & Weaknesses

9.20 Suzhou Nanomicro Technology

9.20.1 Suzhou Nanomicro Technology Details

9.20.2 Suzhou Nanomicro Technology Major Business

9.20.3 Suzhou Nanomicro Technology IVD Microspheres Product and Services

9.20.4 Suzhou Nanomicro Technology IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Suzhou Nanomicro Technology Recent Developments/Updates

9.20.6 Suzhou Nanomicro Technology Competitive Strengths & Weaknesses

9.21 Shanghai Allrun Nano Science & Technology

- 9.21.1 Shanghai Allrun Nano Science & Technology Details
- 9.21.2 Shanghai Allrun Nano Science & Technology Major Business
- 9.21.3 Shanghai Allrun Nano Science & Technology IVD Microspheres Product and Services
- 9.21.4 Shanghai Allrun Nano Science & Technology IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.21.5 Shanghai Allrun Nano Science & Technology Recent Developments/Updates
- 9.21.6 Shanghai Allrun Nano Science & Technology Competitive Strengths & Weaknesses
- 9.22 Shanghai Nahong Microsphere Technology
 - 9.22.1 Shanghai Nahong Microsphere Technology Details
 - 9.22.2 Shanghai Nahong Microsphere Technology Major Business
 - 9.22.3 Shanghai Nahong Microsphere Technology IVD Microspheres Product and Services
 - 9.22.4 Shanghai Nahong Microsphere Technology IVD Microspheres Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.22.5 Shanghai Nahong Microsphere Technology Recent Developments/Updates
 - 9.22.6 Shanghai Nahong Microsphere Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 IVD Microspheres Industry Chain
- 10.2 IVD Microspheres Upstream Analysis
 - 10.2.1 IVD Microspheres Core Raw Materials
 - 10.2.2 Main Manufacturers of IVD Microspheres Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 IVD Microspheres Production Mode
- 10.6 IVD Microspheres Procurement Model
- 10.7 IVD Microspheres Industry Sales Model and Sales Channels
 - 10.7.1 IVD Microspheres Sales Model
 - 10.7.2 IVD Microspheres Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World IVD Microspheres Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World IVD Microspheres Production Value by Region (2021-2026) & (USD Million)

Table 3. World IVD Microspheres Production Value by Region (2027-2032) & (USD Million)

Table 4. World IVD Microspheres Production Value Market Share by Region (2021-2026)

Table 5. World IVD Microspheres Production Value Market Share by Region (2027-2032)

Table 6. World IVD Microspheres Production by Region (2021-2026) & (Kg)

Table 7. World IVD Microspheres Production by Region (2027-2032) & (Kg)

Table 8. World IVD Microspheres Production Market Share by Region (2021-2026)

Table 9. World IVD Microspheres Production Market Share by Region (2027-2032)

Table 10. World IVD Microspheres Average Price by Region (2021-2026) & (USD/g)

Table 11. World IVD Microspheres Average Price by Region (2027-2032) & (USD/g)

Table 12. IVD Microspheres Major Market Trends

Table 13. World IVD Microspheres Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kg)

Table 14. World IVD Microspheres Consumption by Region (2021-2026) & (Kg)

Table 15. World IVD Microspheres Consumption Forecast by Region (2027-2032) & (Kg)

Table 16. World IVD Microspheres Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key IVD Microspheres Producers in 2025

Table 18. World IVD Microspheres Production by Manufacturer (2021-2026) & (Kg)

Table 19. Production Market Share of Key IVD Microspheres Producers in 2025

Table 20. World IVD Microspheres Average Price by Manufacturer (2021-2026) & (USD/g)

Table 21. Global IVD Microspheres Company Evaluation Quadrant

Table 22. World IVD Microspheres Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and IVD Microspheres Production Site of Key Manufacturer

Table 24. IVD Microspheres Market: Company Product Type Footprint

Table 25. IVD Microspheres Market: Company Product Application Footprint

Table 26. IVD Microspheres Competitive Factors
Table 27. IVD Microspheres New Entrant and Capacity Expansion Plans
Table 28. IVD Microspheres Mergers & Acquisitions Activity
Table 29. United States VS China IVD Microspheres Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China IVD Microspheres Production Comparison, (2021 & 2025 & 2032) & (Kg)
Table 31. United States VS China IVD Microspheres Consumption Comparison, (2021 & 2025 & 2032) & (Kg)
Table 32. United States Based IVD Microspheres Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers IVD Microspheres Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers IVD Microspheres Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers IVD Microspheres Production (2021-2026) & (Kg)
Table 36. United States Based Manufacturers IVD Microspheres Production Market Share (2021-2026)
Table 37. China Based IVD Microspheres Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers IVD Microspheres Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers IVD Microspheres Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers IVD Microspheres Production, (2021-2026) & (Kg)
Table 41. China Based Manufacturers IVD Microspheres Production Market Share (2021-2026)
Table 42. Rest of World Based IVD Microspheres Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers IVD Microspheres Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers IVD Microspheres Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers IVD Microspheres Production, (2021-2026) & (Kg)
Table 46. Rest of World Based Manufacturers IVD Microspheres Production Market Share (2021-2026)

Table 47. World IVD Microspheres Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World IVD Microspheres Production by Type (2021-2026) & (Kg)

Table 49. World IVD Microspheres Production by Type (2027-2032) & (Kg)

Table 50. World IVD Microspheres Production Value by Type (2021-2026) & (USD Million)

Table 51. World IVD Microspheres Production Value by Type (2027-2032) & (USD Million)

Table 52. World IVD Microspheres Average Price by Type (2021-2026) & (USD/g)

Table 53. World IVD Microspheres Average Price by Type (2027-2032) & (USD/g)

Table 54. World IVD Microspheres Production Value by Material, (USD Million), 2021 & 2025 & 2032

Table 55. World IVD Microspheres Production by Material (2021-2026) & (Kg)

Table 56. World IVD Microspheres Production by Material (2027-2032) & (Kg)

Table 57. World IVD Microspheres Production Value by Material (2021-2026) & (USD Million)

Table 58. World IVD Microspheres Production Value by Material (2027-2032) & (USD Million)

Table 59. World IVD Microspheres Average Price by Material (2021-2026) & (USD/g)

Table 60. World IVD Microspheres Average Price by Material (2027-2032) & (USD/g)

Table 61. World IVD Microspheres Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Table 62. World IVD Microspheres Production by Particle Size (2021-2026) & (Kg)

Table 63. World IVD Microspheres Production by Particle Size (2027-2032) & (Kg)

Table 64. World IVD Microspheres Production Value by Particle Size (2021-2026) & (USD Million)

Table 65. World IVD Microspheres Production Value by Particle Size (2027-2032) & (USD Million)

Table 66. World IVD Microspheres Average Price by Particle Size (2021-2026) & (USD/g)

Table 67. World IVD Microspheres Average Price by Particle Size (2027-2032) & (USD/g)

Table 68. World IVD Microspheres Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World IVD Microspheres Production by Application (2021-2026) & (Kg)

Table 70. World IVD Microspheres Production by Application (2027-2032) & (Kg)

Table 71. World IVD Microspheres Production Value by Application (2021-2026) & (USD Million)

Table 72. World IVD Microspheres Production Value by Application (2027-2032) &

(USD Million)

Table 73. World IVD Microspheres Average Price by Application (2021-2026) & (USD/g)

Table 74. World IVD Microspheres Average Price by Application (2027-2032) & (USD/g)

Table 75. Merck Basic Information, Manufacturing Base and Competitors

Table 76. Merck Major Business

Table 77. Merck IVD Microspheres Product and Services

Table 78. Merck IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Merck Recent Developments/Updates

Table 80. Merck Competitive Strengths & Weaknesses

Table 81. Thermo Fisher Basic Information, Manufacturing Base and Competitors

Table 82. Thermo Fisher Major Business

Table 83. Thermo Fisher IVD Microspheres Product and Services

Table 84. Thermo Fisher IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Thermo Fisher Recent Developments/Updates

Table 86. Thermo Fisher Competitive Strengths & Weaknesses

Table 87. JSR Life Sciences (Tokuyama) Basic Information, Manufacturing Base and Competitors

Table 88. JSR Life Sciences (Tokuyama) Major Business

Table 89. JSR Life Sciences (Tokuyama) IVD Microspheres Product and Services

Table 90. JSR Life Sciences (Tokuyama) IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. JSR Life Sciences (Tokuyama) Recent Developments/Updates

Table 92. JSR Life Sciences (Tokuyama) Competitive Strengths & Weaknesses

Table 93. Cytiva (Danaher) Basic Information, Manufacturing Base and Competitors

Table 94. Cytiva (Danaher) Major Business

Table 95. Cytiva (Danaher) IVD Microspheres Product and Services

Table 96. Cytiva (Danaher) IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Cytiva (Danaher) Recent Developments/Updates

Table 98. Cytiva (Danaher) Competitive Strengths & Weaknesses

Table 99. Bangs Laboratories (Ott Scientific) Basic Information, Manufacturing Base and Competitors

Table 100. Bangs Laboratories (Ott Scientific) Major Business

Table 101. Bangs Laboratories (Ott Scientific) IVD Microspheres Product and Services

Table 102. Bangs Laboratories (Ott Scientific) IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Bangs Laboratories (Ott Scientific) Recent Developments/Updates

Table 104. Bangs Laboratories (Ott Scientific) Competitive Strengths & Weaknesses
Table 105. Fujikura Kasei Basic Information, Manufacturing Base and Competitors
Table 106. Fujikura Kasei Major Business
Table 107. Fujikura Kasei IVD Microspheres Product and Services
Table 108. Fujikura Kasei IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Fujikura Kasei Recent Developments/Updates
Table 110. Fujikura Kasei Competitive Strengths & Weaknesses
Table 111. BD (Waters) Basic Information, Manufacturing Base and Competitors
Table 112. BD (Waters) Major Business
Table 113. BD (Waters) IVD Microspheres Product and Services
Table 114. BD (Waters) IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. BD (Waters) Recent Developments/Updates
Table 116. BD (Waters) Competitive Strengths & Weaknesses
Table 117. Agilent Basic Information, Manufacturing Base and Competitors
Table 118. Agilent Major Business
Table 119. Agilent IVD Microspheres Product and Services
Table 120. Agilent IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Agilent Recent Developments/Updates
Table 122. Agilent Competitive Strengths & Weaknesses
Table 123. VirionSerion Basic Information, Manufacturing Base and Competitors
Table 124. VirionSerion Major Business
Table 125. VirionSerion IVD Microspheres Product and Services
Table 126. VirionSerion IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. VirionSerion Recent Developments/Updates
Table 128. VirionSerion Competitive Strengths & Weaknesses
Table 129. Ademtech Basic Information, Manufacturing Base and Competitors
Table 130. Ademtech Major Business
Table 131. Ademtech IVD Microspheres Product and Services
Table 132. Ademtech IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Ademtech Recent Developments/Updates
Table 134. Ademtech Competitive Strengths & Weaknesses
Table 135. Magtivio Basic Information, Manufacturing Base and Competitors
Table 136. Magtivio Major Business
Table 137. Magtivio IVD Microspheres Product and Services

Table 138. Magtivio IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Magtivio Recent Developments/Updates

Table 140. Magtivio Competitive Strengths & Weaknesses

Table 141. Chemicell Basic Information, Manufacturing Base and Competitors

Table 142. Chemicell Major Business

Table 143. Chemicell IVD Microspheres Product and Services

Table 144. Chemicell IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Chemicell Recent Developments/Updates

Table 146. Chemicell Competitive Strengths & Weaknesses

Table 147. CD Bioparticles Basic Information, Manufacturing Base and Competitors

Table 148. CD Bioparticles Major Business

Table 149. CD Bioparticles IVD Microspheres Product and Services

Table 150. CD Bioparticles IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. CD Bioparticles Recent Developments/Updates

Table 152. CD Bioparticles Competitive Strengths & Weaknesses

Table 153. IKERLAT Polymers Basic Information, Manufacturing Base and Competitors

Table 154. IKERLAT Polymers Major Business

Table 155. IKERLAT Polymers IVD Microspheres Product and Services

Table 156. IKERLAT Polymers IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. IKERLAT Polymers Recent Developments/Updates

Table 158. IKERLAT Polymers Competitive Strengths & Weaknesses

Table 159. Suzhou Vdo Biotech Basic Information, Manufacturing Base and Competitors

Table 160. Suzhou Vdo Biotech Major Business

Table 161. Suzhou Vdo Biotech IVD Microspheres Product and Services

Table 162. Suzhou Vdo Biotech IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Suzhou Vdo Biotech Recent Developments/Updates

Table 164. Suzhou Vdo Biotech Competitive Strengths & Weaknesses

Table 165. Suzhou Beaver Biomedical Engineering Basic Information, Manufacturing Base and Competitors

Table 166. Suzhou Beaver Biomedical Engineering Major Business

Table 167. Suzhou Beaver Biomedical Engineering IVD Microspheres Product and Services

Table 168. Suzhou Beaver Biomedical Engineering IVD Microspheres Production (Kg),

Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Suzhou Beaver Biomedical Engineering Recent Developments/Updates

Table 170. Suzhou Beaver Biomedical Engineering Competitive Strengths & Weaknesses

Table 171. Nanjing Nanoeast Biological Technology Basic Information, Manufacturing Base and Competitors

Table 172. Nanjing Nanoeast Biological Technology Major Business

Table 173. Nanjing Nanoeast Biological Technology IVD Microspheres Product and Services

Table 174. Nanjing Nanoeast Biological Technology IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Nanjing Nanoeast Biological Technology Recent Developments/Updates

Table 176. Nanjing Nanoeast Biological Technology Competitive Strengths & Weaknesses

Table 177. Sunresin Basic Information, Manufacturing Base and Competitors

Table 178. Sunresin Major Business

Table 179. Sunresin IVD Microspheres Product and Services

Table 180. Sunresin IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Sunresin Recent Developments/Updates

Table 182. Sunresin Competitive Strengths & Weaknesses

Table 183. Suzhou Knowledge & Benefit Sphere Tech Basic Information, Manufacturing Base and Competitors

Table 184. Suzhou Knowledge & Benefit Sphere Tech Major Business

Table 185. Suzhou Knowledge & Benefit Sphere Tech IVD Microspheres Product and Services

Table 186. Suzhou Knowledge & Benefit Sphere Tech IVD Microspheres Production (Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Suzhou Knowledge & Benefit Sphere Tech Recent Developments/Updates

Table 188. Suzhou Knowledge & Benefit Sphere Tech Competitive Strengths & Weaknesses

Table 189. Suzhou Nanomicro Technology Basic Information, Manufacturing Base and Competitors

Table 190. Suzhou Nanomicro Technology Major Business

Table 191. Suzhou Nanomicro Technology IVD Microspheres Product and Services

Table 192. Suzhou Nanomicro Technology IVD Microspheres Production (Kg), Price

(USD/g), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Suzhou Nanomicro Technology Recent Developments/Updates

Table 194. Suzhou Nanomicro Technology Competitive Strengths & Weaknesses

Table 195. Shanghai Allrun Nano Science & Technology Basic Information,
Manufacturing Base and Competitors

Table 196. Shanghai Allrun Nano Science & Technology Major Business

Table 197. Shanghai Allrun Nano Science & Technology IVD Microspheres Product and
Services

Table 198. Shanghai Allrun Nano Science & Technology IVD Microspheres Production
(Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share
(2021-2026)

Table 199. Shanghai Allrun Nano Science & Technology Recent
Developments/Updates

Table 200. Shanghai Allrun Nano Science & Technology Competitive Strengths &
Weaknesses

Table 201. Shanghai Nahong Microsphere Technology Basic Information,
Manufacturing Base and Competitors

Table 202. Shanghai Nahong Microsphere Technology Major Business

Table 203. Shanghai Nahong Microsphere Technology IVD Microspheres Product and
Services

Table 204. Shanghai Nahong Microsphere Technology IVD Microspheres Production
(Kg), Price (USD/g), Production Value (USD Million), Gross Margin and Market Share
(2021-2026)

Table 205. Shanghai Nahong Microsphere Technology Recent Developments/Updates

Table 206. Shanghai Nahong Microsphere Technology Competitive Strengths &
Weaknesses

Table 207. Global Key Players of IVD Microspheres Upstream (Raw Materials)

Table 208. Global IVD Microspheres Typical Customers

Table 209. IVD Microspheres Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. IVD Microspheres Picture

Figure 2. World IVD Microspheres Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World IVD Microspheres Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World IVD Microspheres Production (2021-2032) & (Kg)

Figure 5. World IVD Microspheres Average Price (2021-2032) & (USD/g)

Figure 6. World IVD Microspheres Production Value Market Share by Region (2021-2032)

Figure 7. World IVD Microspheres Production Market Share by Region (2021-2032)

Figure 8. North America IVD Microspheres Production (2021-2032) & (Kg)

Figure 9. Europe IVD Microspheres Production (2021-2032) & (Kg)

Figure 10. China IVD Microspheres Production (2021-2032) & (Kg)

Figure 11. Japan IVD Microspheres Production (2021-2032) & (Kg)

Figure 12. IVD Microspheres Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 15. World IVD Microspheres Consumption Market Share by Region (2021-2032)

Figure 16. United States IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 17. China IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 18. Europe IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 19. Japan IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 20. South Korea IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 21. ASEAN IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 22. India IVD Microspheres Consumption (2021-2032) & (Kg)

Figure 23. Producer Shipments of IVD Microspheres by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for IVD Microspheres Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for IVD Microspheres Markets in 2025

Figure 26. United States VS China: IVD Microspheres Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: IVD Microspheres Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: IVD Microspheres Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers IVD Microspheres Production Market Share 2025

Figure 30. China Based Manufacturers IVD Microspheres Production Market Share 2025

Figure 31. Rest of World Based Manufacturers IVD Microspheres Production Market Share 2025

Figure 32. World IVD Microspheres Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World IVD Microspheres Production Value Market Share by Type in 2025

Figure 34. Magnetic Type

Figure 35. Non-magnetic Type

Figure 36. World IVD Microspheres Production Market Share by Type (2021-2032)

Figure 37. World IVD Microspheres Production Value Market Share by Type (2021-2032)

Figure 38. World IVD Microspheres Average Price by Type (2021-2032) & (USD/g)

Figure 39. World IVD Microspheres Production Value by Material, (USD Million), 2021 & 2025 & 2032

Figure 40. World IVD Microspheres Production Value Market Share by Material in 2025

Figure 41. Polymer Microsphere (PS/PMMA, etc)

Figure 42. Silica Microsphere

Figure 43. Others

Figure 44. World IVD Microspheres Production Market Share by Material (2021-2032)

Figure 45. World IVD Microspheres Production Value Market Share by Material (2021-2032)

Figure 46. World IVD Microspheres Average Price by Material (2021-2032) & (USD/g)

Figure 47. World IVD Microspheres Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Figure 48. World IVD Microspheres Production Value Market Share by Particle Size in 2025

Figure 49. Below 1?m

Figure 50. 1-5?m

Figure 51. Above 5?m

Figure 52. World IVD Microspheres Production Market Share by Particle Size (2021-2032)

Figure 53. World IVD Microspheres Production Value Market Share by Particle Size (2021-2032)

Figure 54. World IVD Microspheres Average Price by Particle Size (2021-2032) &

(USD/g)

Figure 55. World IVD Microspheres Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World IVD Microspheres Production Value Market Share by Application in 2025

Figure 57. Nucleic Acid Extraction/Molecular Diagnostic Pretreatment

Figure 58. Chemiluminescent Immunoassay (CLIA)

Figure 59. Lateral Chromatography/Immunofluorescence Point-of-Care Testing (POCT)

Figure 60. Immunoturbidimetry/Latex Agglutination

Figure 61. Flow Cytometry/Multiplex Analysis/Calibration and Quality Control

Figure 62. Others

Figure 63. World IVD Microspheres Production Market Share by Application (2021-2032)

Figure 64. World IVD Microspheres Production Value Market Share by Application (2021-2032)

Figure 65. World IVD Microspheres Average Price by Application (2021-2032) & (USD/g)

Figure 66. IVD Microspheres Industry Chain

Figure 67. IVD Microspheres Procurement Model

Figure 68. IVD Microspheres Sales Model

Figure 69. IVD Microspheres Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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