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Rapid Point-of-Care Testing for Sickle Cell Anemia Market Size, Share & Trends Analysis Report By Type (Lateral Flow Immunoassay, Paper-based Rapid Diagnostics), By Technology, By Age Group, By Distribution Channel, By End Use, By Region, And Segment Forecasts, 2025 - 2030

https://marketpublishers.com/r/RE77FDC3ABA7EN.html
Date: May 2025
Pages: 320
Price: US$ 5,950.00 (Single User License)
ID: RE77FDC3ABA7EN

Abstracts

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Rapid Point-of-Care Testing for Sickle Cell Anemia Market Growth & Trends

The global rapid point-of-care testing for sickle cell anemia market size is expected to reach USD 522.83 million by 2030, registering a CAGR of 9.7% from 2025 to 2030, according to a new report by Grand View Research, Inc. Sickle Cell Disease (SCD) is a genetic blood disorder that results in the production of abnormally shaped red blood cells, leading to severe pain, anemia, and potential organ damage due to these sickle-shaped cells obstructing blood flow. India, according to the Journal of Hematology and Allied Science (JHAS), has one of the highest frequencies of the sickle ?-globin allele. Early and accurate detection of SCD is critical for effective management and treatment. Traditional diagnostic methods often require specialized healthcare facilities and well-equipped laboratories, which may be inaccessible in resource-limited areas. This challenge has driven the growth of rapid point-of-care (POC) testing technologies, offering a more efficient and accessible alternative for diagnosing SCD.

POC testing offers several benefits, including fast results, ease of use, and suitability for decentralized healthcare settings. These features are particularly advantageous in regions with high SCD prevalence, where early diagnosis and intervention can

substantially improve patient outcomes. By enabling timely detection, POC testing helps in better disease management, reducing the risk of severe complications and mortality associated with undiagnosed SCD. Furthermore, POC tests play a key role in newborn screening programs, helping to identify affected infants at birth and begin treatment immediately. Recent advancements in lateral flow immunoassays (LFIA) have significantly improved the diagnosis of SCD, particularly in low-resource settings. One innovative development is the multiplexed, allele-specific recombinase polymerase amplification (RPA) assay, which uses a lateral flow readout to detect multiple mutations in the ?-globin gene, the primary cause of SCD, offering an efficient and accurate rapid diagnostic method. Additionally, integrating optical nanoparticles into LFIA platforms has enhanced the sensitivity and specificity of these tests, making them powerful diagnostic tools for SCD and other diseases.

Another notable innovation is the E-junction lateral flow immunoassay, designed for large-scale SCD screening in low- and middle-income countries (LMICs). This affordable, user-friendly POC device can diagnose healthy individuals, SCD patients, and carriers using just a single drop of whole blood. Its cost-effectiveness and reliability make it ideal for areas with limited access to traditional diagnostic methods, helping address the high mortality rates caused by delayed diagnoses. Similarly, the Sickle SCAN POC device demonstrates impressive sensitivity and specificity in detecting hemoglobin variants HbA, HbS, and HbC. It works effectively with both liquid blood and dried blood spots (DBS), even in samples containing high levels of fetal hemoglobin (HbF), making it an excellent choice for widespread screening in resource-constrained regions. The HemoTypeSC test, another promising tool for early SCD detection, is also highly sensitive and specific, particularly useful for large-scale screening programs. Mobile health units and community outreach programs, often led by NGOs, are also integral to providing rapid POC testing in resource-poor settings. These efforts not only enhance access to diagnostic services but also raise awareness about SCD and the importance of early intervention. Moreover, partnerships between NGOs and private companies have helped subsidize diagnostic tests, making them more affordable and scalable across various healthcare environments.

Targeted initiatives, such as the National Sickle Cell Anaemia Elimination Mission (NSCAEM), aim to eradicate sickle cell anemia as a public health issue by 2047 through universal screening, awareness campaigns, and improved disease management. The mission aims to screen about 70 million people aged 0-40, initially focusing on high-prevalence states like Gujarat and Maharashtra, while collaborating with the National Health Mission (NHM) for effective resource utilization.

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Rapid Point-of-Care Testing for Sickle Cell Anemia Market Report Highlights

Based on type, the lateral flow immunoassay segment led the market in 2024 with a 51.66% share, due to its affordability, ease of use, and fast, accurate results. LFIA's ability to detect multiple hemoglobin variants and its suitability for low-resource settings contribute to its increasing adoption in global diagnostics.

Based on technology, the hemoglobin electrophoresis segment led the market in 2024 with a 48.99% share, driven by its high accuracy in detecting hemoglobinopathies. As a reliable diagnostic method, it allows for precise identification of sickle cell disease and other hemoglobin variants, making it crucial for early intervention and disease management.

Based on age group, the newborn screening (12 months and below) segment led the market in 2024 and is expected to witness the fastest CAGR during the forecast period, due to growing awareness and the importance of early diagnosis. Early detection through POC testing allows for prompt treatment, reducing complications and improving long-term outcomes for affected infants.

The government laboratories sector type segment is experiencing significant growth, driven by national initiatives and technological advancements. The Indian Council of Medical Research (ICMR) has endorsed existing POC tests for sickle cell disease screening, encouraging states to implement one or two-level screening approaches.

The hospitals & clinics end use segment is experiencing substantial growth, driven by the increasing prevalence of sickle cell disease and the demand for timely diagnostics.

Based on distribution channel, the Business-to-Business (B2B) segment is experiencing significant growth, driven by increasing demand for accessible and efficient diagnostic solutions. Companies are forming strategic partnerships to expand their product offerings and reach broader markets.

North America dominated the global Rapid point-of-care testing for sickle cell anemia industry with a revenue share of 43.97% in 2024, driven by increasing demand for accessible and efficient diagnostic solutions. This expansion is attributed to factors such as the rising prevalence of chronic diseases, advancements in diagnostic technologies, and increased funding from

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government and private institutions.

Companies like BioMedomics and Silver Lake Research are leading the way with highly sensitive and specific tests, such as Sickle SCAN and HemoTypeSC, respectively, while others are leveraging global distribution networks to reach underserved populations. The market is poised for growth as these players work to enhance diagnostic capabilities, reduce turnaround times, and support early intervention efforts for sickle cell disease

Companies Mentioned

BIOMEDOMICS INC.
Silver Lake Research Corporation
Bio-Rad Laboratories, Inc.
Trivitron Healthcare
Hemex Health
Sysmex Corporation
EKF Diagnostics Holdings plc.
HemoCue America (Danaher)

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