

# **South Africa IVD Centralized Diagnostics Market (By Segment - Immunoassay, Clinical Chemistry, Coagulation, Hematology, Urinalysis, Rest of Centralized Diagnostics), Company Share Analysis, Market Dynamics and Recent Developments – Forecast to 2032**

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## **Abstracts**

The South Africa IVD centralized diagnostics market was valued at US\$ 76.6 Million in 2025, and the market is projected to reach US\$ 121.8 Million by 2032. South Africa represents the largest and most mature in vitro diagnostics (IVD) market in Sub-Saharan Africa. As the region's most advanced healthcare system, the country benefits from a highly centralized laboratory infrastructure that plays a critical role in addressing a substantial burden of infectious diseases, particularly HIV and tuberculosis.

Centralized diagnostics form the backbone of South Africa's pathology ecosystem, encompassing core disciplines such as clinical chemistry, immunoassays, hematology, coagulation, and urinalysis. This centralized model is essential to sustaining national diagnostic capacity, particularly in the public sector, while the private sector continues to drive adoption of higher-end technologies and premium testing menus. The growth is driven by an increasing burden of chronic diseases, expanding healthcare access, and the continuous modernization of laboratory infrastructure in both public (NHLS) and private sectors. Moreover, the advancements in immunoassay and coagulation technologies, including automation and AI integration, is enhancing test accuracy and reducing turnaround times, thereby driving the market growth.

## **Recent Developments**

March 2026: Roche received CE Mark approval for the Elecsys Apolipoprotein E4 biomarker test, the first IVD immunoassay to detect the ApoE4 genetic variant via a simple blood test, facilitating faster identification of high-risk Alzheimer's patients.

July 2025: Siemens Healthineers has earned My Green Lab ACT Ecolabel Certification for more than 150 immunoassay and clinical chemistry reagents used globally by medical laboratories for in vitro diagnostic testing. The company is the first to earn certification for both reagents and analyzers in its Atellica portfolio.

March 2025: Labcorp agreed to acquire oncology and clinical-testing assets from BioReference Health, bolstering specialized cancer diagnostics.

January 2025: bioMérieux completed the acquisition of SpinChip Diagnostics, gaining a 10-minute whole-blood immunoassay system for acute-care cardiology.

## By Segment: South Africa IVD Centralized Diagnostics Market and Forecast – Key Takeaways

Immunoassays represent the largest segment of the South Africa IVD centralized diagnostics market, driven by their widespread use in high-volume clinical testing and strong presence in both public and private laboratory networks. In centralized laboratories, immunoassays offer advantages such as high sensitivity, reproducibility, and compatibility with fully automated analyzers, making them ideal for processing large sample volumes.

Clinical Chemistry (CC) accounted for substantial share of the South Africa IVD centralized diagnostics market in 2025, reflecting its critical role in routine and specialized laboratory testing. This segment remains the backbone of diagnostic services, supporting high-volume analysis of key biomarkers related to metabolic disorders, liver and kidney function, cardiovascular diseases, and electrolyte balance.

The South Africa IVD CC routine testing market is primarily fueled by the high prevalence of diabetes, cardiovascular disease, and age-related conditions, which drive frequent testing and monitoring. Roche stands out as the market

leader in the South Africa clinical chemistry routine testing market, followed by Beckman Coulter. Roche's market leadership is supported by robust reagent consumption and integrated solutions that address both public sector scale and private lab demands.

The South Africa IVD clinical chemistry drug-of-abuse (DoA) testing market is highly consolidated, with Roche, Abbott, and Siemens Healthineers, collectively accounting for around three-quarters of the market in 2025.

Therapeutic drug monitoring is gaining traction with the growing need for precision dosing in oncology, cardiology, and infectious disease management. The rising prevalence of infectious diseases such as HIV and tuberculosis, alongside a growing chronic disease population, is accelerating demand for frequent and reliable diagnostics, thereby strengthening reagent and consumables utilization within centralized laboratories. The South Africa IVD centralized therapeutic drug monitoring market is highly consolidated, with Roche commanding highest share, followed by Abbott and Beckman Coulter.

HbA1c testing has become a cornerstone of routine clinical chemistry, driven by the rising burden of diabetes, which is expanding the need for long-term glycemic monitoring and early diagnosis. Roche leads the HbA1c testing market, underpinned by its strong footprint in high-throughput centralized laboratories, particularly through its Cobas analyzer series and integrated reagent ecosystem. Trinity Biotech follows with significant share, reflecting its specialized focus on HbA1c testing solutions and strong positioning in niche and mid-tier laboratory segments, where cost-effective yet reliable testing platforms are critical.

Hematology captured third highest share of the South Africa IVD centralized diagnostics market in 2025, underscoring its importance in routine disease diagnosis and monitoring. This segment plays a vital role in the detection and management of blood-related disorders, infections, immune conditions, and chronic diseases through tests such as complete blood counts (CBCs). Roche leads the South Africa cell blood count (CBC) market, followed by Beckman Coulter, and Horiba.

Coagulation testing is gaining increased importance in the South Africa IVD centralized diagnostics market, reflecting its specialized yet essential role in clinical diagnostics. This segment focuses on evaluating blood clotting functions, crucial for managing patients with bleeding disorders, thrombosis, and those on

anticoagulant therapy. In South Africa coagulation market, Sysmex dominated the market in 2025, followed by Werfen, Diagnostica Stago and Horiba.

Urinalysis contributed least share to the South Africa IVD centralized diagnostics market in 2025. This segment encompasses routine urine tests that help identify kidney disorders, urinary tract infections, metabolic diseases such as diabetes, and early signs of systemic conditions. In South Africa Urinalysis Qualitative Market, Siemens is the leader followed by Roche and Sysmex.

iGATE RESEARCH report titled “South Africa IVD Centralized Diagnostics Market (By Segment - Immunoassay, Clinical Chemistry, Coagulation, Hematology, Urinalysis, Rest of Centralized Diagnostics), Company Share Analysis, Market Dynamics and Recent Developments – Forecast to 2032” provides a comprehensive assessment of the fast-evolving, high-growth South Africa IVD Market.

This 115 Pages report with 64 Figures and 2 Tables has been analyzed from 11 viewpoints:

1. South Africa IVD - Centralized Diagnostics Market and Forecast (2023 – 2032)
2. By Segment - South Africa IVD Centralized Diagnostics Market Share and Forecast (2023 – 2032)
3. South Africa IVD Centralized Diagnostics - Clinical Chemistry Market and Forecast (2023 – 2032)
4. South Africa IVD Centralized Diagnostics – Immunoassay Market and Forecast (2023 – 2032)
5. South Africa IVD Centralized Diagnostics – Coagulation Market and Forecast (2023 – 2032)
6. South Africa IVD Centralized Diagnostics – Urinalysis Market and Forecast (2023 – 2032)
7. South Africa IVD Centralized Diagnostics – Hematology Market and Forecast (2023 – 2032)
8. South Africa IVD – Rest of Centralized Diagnostics Market and Forecast (2023 – 2032)
9. South Africa IVD Centralized Diagnostics Market – Company Profiles
10. South Africa IVD Market – Recent Developments
11. South Africa In-vitro Diagnostics – Market Dynamics

By Segment: South Africa IVD Centralized Diagnostics Market and Forecast

*South Africa IVD Centralized Diagnostics Market (By Segment - Immunoassay, Clinical Chemistry, Coagulation, He...*

## Clinical Chemistry

Routine Testing

Drug of Abuse Testing

Therapeutic Drug Monitoring

HbA1c Testing

Specific Proteins Testing

## Immunoassay

Instruments Market

Blood Screening Market

Reagents Market

## Coagulation

Instruments Market

Reagents Market

## Urinalysis

Qualitative Market

Sedimentation Test Market

Reagents Market

## Hematology

Instruments Market

Cell Blood Count (CBC) Market

Cell Imaging Analysis Market

Reagents Market

Rest of Centralized Diagnostics

## South Africa IVD Centralized Diagnostics Market – Company Profiles

1. Roche
2. Abbott Laboratories
3. Trinity Biotech
4. Beckman Coulter
5. Siemens Healthineers
6. Sysmex Corporation
7. Sebia
8. Horiba
9. Diagnostica Stago
10. Werfen

## Data Sources

iGATE RESEARCH employs rigorous primary and secondary research techniques in developing distinctive data sets and research material for business reports. This report is built by using data and information sourced from Proprietary Information Database, Primary and Secondary Research Methodologies, and In house analysis by iGATE Research dedicated team of qualified professionals with deep industry experience and expertise.

## Contents

### **1. INTRODUCTION**

- 1.1 Industry Definition and Research Scope
- 1.2 Research Methodology
  - 1.2.1 Research Design
  - 1.2.2 Research Approach
  - 1.2.3 Data Collection Methods
  - 1.2.4 Market Assumptions

### **2. EXECUTIVE SUMMARY**

### **3. SOUTH AFRICA IVD - CENTRALIZED DIAGNOSTICS MARKET AND FORECAST (2023 – 2032)**

### **4. BY SEGMENT - SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS MARKET SHARE AND FORECAST (2023 – 2032)**

### **5. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS - CLINICAL CHEMISTRY MARKET AND FORECAST**

- 5.1 South Africa IVD Centralized Diagnostics Clinical Chemistry - Instruments Market and Forecast
- 5.2 South Africa IVD Centralized Diagnostics Clinical Chemistry - Reagents Market and Forecast
  - 5.2.1 South Africa IVD Centralized Diagnostics Clinical Chemistry – Routine Testing Market and Forecast
  - 5.2.2 South Africa Routine Testing Market - Company Share (2025 – 2026e)
  - 5.2.3 South Africa IVD Centralized Diagnostics Clinical Chemistry – Drug of Abuse Testing Market and Forecast
  - 5.2.4 South Africa Drug of Abuse Testing Market - Company Share (2025 – 2026e)
  - 5.2.5 South Africa IVD Centralized Diagnostics Clinical Chemistry – Therapeutic Drug Monitoring Market and Forecast
  - 5.2.6 South Africa Therapeutic Drug Monitoring Market - Company Share (2025 – 2026e)
  - 5.2.7 South Africa IVD Centralized Diagnostics Clinical Chemistry – HbA1c Testing Market and Forecast
  - 5.2.8 South Africa HbA1c Testing Market - Company Share (2025 – 2026e)

5.2.9 South Africa IVD Centralized Diagnostics Clinical Chemistry – Specific Proteins Testing Market and Forecast

5.2.10 South Africa Specific Proteins Testing Market - Company Share (2025 – 2026e)

## **6. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS – IMMUNOASSAY MARKET AND FORECAST**

6.1 South Africa IVD Centralized Diagnostics Immunoassay - Instruments Market and Forecast

6.2 South Africa IVD Centralized Diagnostics Immunoassay - Blood Screening Market and Forecast

6.3 South Africa IVD Centralized Diagnostics Immunoassay - Reagents Market and Forecast

## **7. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS – COAGULATION MARKET AND FORECAST**

7.1 South Africa IVD Centralized Diagnostics Coagulation - Instruments Market and Forecast

7.1.1 South Africa Coagulation Instruments Market – Company Share (2025 – 2026e)

7.2 South Africa IVD Centralized Diagnostics Coagulation - Reagents Market and Forecast

7.2.1 South Africa Coagulation Reagents Market – Company Share (2025 – 2026e)

## **8. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS – URINALYSIS MARKET AND FORECAST**

8.1 South Africa IVD Centralized Diagnostics Urinalysis - Qualitative Market and Forecast

8.1.1 South Africa Urinalysis Qualitative Market - Company Share (2025 – 2026e)

8.1.2 South Africa IVD Centralized Diagnostics Urinalysis - Reagents Market and Forecast

8.2 South Africa IVD Centralized Diagnostics Urinalysis - Sedimentation Test Market and Forecast

8.2.1 South Africa Urinalysis Sedimentation Test Market - Company Share (2025 – 2026e)

8.3 South Africa IVD Centralized Diagnostics Urinalysis – Instrument Market and Forecast



## **9. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS – HEMATOLOGY MARKET AND FORECAST**

9.1 South Africa IVD Centralized Diagnostics Hematology - Instrument Market and Forecast

9.2 South Africa IVD Centralized Diagnostics Hematology - Cell Blood Count (CBC) Market and Forecast

9.2.1 South Africa Cell Blood Count (CBC) Market - Company Share (2025 – 2026e)

9.3 South Africa IVD Centralized Diagnostics Hematology - Cell Imaging Analysis Market and Forecast

9.4 South Africa IVD Centralized Diagnostics Hematology – Reagents Market and Forecast

## **10. SOUTH AFRICA IVD – REST OF CENTRALIZED DIAGNOSTICS MARKET AND FORECAST**

## **11. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS MARKET – COMPANY PROFILES**

11.1 Roche

11.2 Abbott Laboratories

11.3 Trinity Biotech

11.4 Beckman Coulter

11.5 Siemens Healthineers

11.6 Sysmex Corporation

11.7 Sebia

11.8 Horiba

11.9 Diagnostica Stago

11.10 Werfen

## **12. SOUTH AFRICA IVD MARKET – RECENT DEVELOPMENTS**

## **13. SOUTH AFRICA IVD CENTRALIZED DIAGNOSTICS – MARKET DYNAMICS**

13.1 South Africa IVD Centralized Diagnostics Market – Growth Drivers

13.2 South Africa IVD Centralized Diagnostics Market – Challenges

## List Of Tables

### LIST OF TABLES

Table 4-1: By Segment - South Africa IVD Centralized Diagnostics Market Share (Percent), 2023 - 2025

Table 4-2: By Segment - Forecast for South Africa IVD Centralized Diagnostics Market Share (Percent), 2026 - 2032

## List Of Figures

### LIST OF FIGURES

Figure 3-1: South Africa IVD - Centralized Diagnostics Market (Million US\$), 2023 – 2025

Figure 3-2: South Africa IVD – Forecast for Centralized Diagnostics Market (Million US\$), 2026 – 2032

Figure 5-1: South Africa IVD Centralized Diagnostics - Clinical Chemistry Market (Million US\$), 2023 - 2025

Figure 5-2: South Africa IVD Centralized Diagnostics - Forecast for Clinical Chemistry Market (Million US\$), 2026 - 2032

Figure 5-3: South Africa Clinical Chemistry - Instruments Market (Million US\$), 2023 - 2025

Figure 5-4: South Africa Clinical Chemistry - Forecast for Instruments Market (Million US\$), 2026 - 2032

Figure 5-5: South Africa Clinical Chemistry - Reagents Market (Million US\$), 2023 - 2025

Figure 5-6: South Africa Clinical Chemistry - Forecast for Reagents Market (Million US\$), 2026 - 2032

Figure 5-7: South Africa Clinical Chemistry - Routine Testing Market (Million US\$), 2023 - 2025

Figure 5-8: South Africa Clinical Chemistry - Forecast for Routine Testing Market (Million US\$), 2026 - 2032

Figure 5-9: South Africa Routine Testing Market - Company Share (Percent), 2025 – 2026e

Figure 5-10: South Africa Clinical Chemistry - Drug of Abuse Testing Market (Million US\$), 2023 - 2025

Figure 5-11: South Africa Clinical Chemistry - Forecast for Drug of Abuse Testing Market (Million US\$), 2026 - 2032

Figure 5-12: South Africa Drug of Abuse Testing Market - Company Share (Percent), 2025 – 2026e

Figure 5-13: South Africa Clinical Chemistry - Therapeutic Drug Monitoring Market (Million US\$), 2023 - 2025

Figure 5-14: South Africa Clinical Chemistry - Forecast for Therapeutic Drug Monitoring Market (Million US\$), 2026 - 2032

Figure 5-15: South Africa Therapeutic Drug Monitoring Market - Company Share (Percent), 2025 – 2026e

Figure 5-16: South Africa Clinical Chemistry - HbA1c Testing Market (Million US\$), 2023 - 2025

Figure 5-17: South Africa Clinical Chemistry - Forecast for HbA1c Testing Market (Million US\$), 2026 - 2032

Figure 5-18: South Africa HbA1c Testing Market - Company Share (Percent), 2025 – 2026e

Figure 5-19: South Africa Clinical Chemistry - Specific Proteins Testing Market (Million US\$), 2023 - 2025

Figure 5-20: South Africa Clinical Chemistry - Forecast for Specific Proteins Testing Market (Million US\$), 2026 - 2032

Figure 5-21: South Africa Specific Proteins Testing Market - Company Share (Percent), 2025 – 2026e

Figure 6-1: South Africa IVD Centralized Diagnostics - Immunoassay Market (Million US\$), 2023 - 2025

Figure 6-2: South Africa IVD Centralized Diagnostics - Forecast for Immunoassay Market (Million US\$), 2026 - 2032

Figure 6-3: South Africa Immunoassay - Instruments Market (Million US\$), 2023 - 2025

Figure 6-4: South Africa Immunoassay - Forecast for Instruments Market (Million US\$), 2026 - 2032

Figure 6-5: South Africa Immunoassay - Blood Screening Market (Million US\$), 2023 - 2025

Figure 6-6: South Africa Immunoassay - Forecast for Blood Screening Market (Million US\$), 2026 - 2032

Figure 6-7: South Africa Immunoassay - Reagents Market (Million US\$), 2023 - 2025

Figure 6-8: South Africa Immunoassay - Forecast for Reagents Market (Million US\$), 2026 - 2032

Figure 7-1: South Africa IVD Centralized Diagnostics - Coagulation Market (Million US\$), 2023 - 2025

Figure 7-2: South Africa IVD Centralized Diagnostics - Forecast for Coagulation Market (Million US\$), 2026 - 2032

Figure 7-3: South Africa Coagulation - Instruments Market (Million US\$), 2023 - 2025

Figure 7-4: South Africa Coagulation - Forecast for Instruments Market (Million US\$), 2026 - 2032

Figure 7-5: South Africa Coagulation Instruments Market - Company Share (Percent), 2025 – 2026e

Figure 7-6: South Africa Coagulation - Reagents Market (Million US\$), 2023 - 2025

Figure 7-7: South Africa Coagulation - Forecast for Reagents Market (Million US\$),

2026 - 2032

Figure 7-8: South Africa Coagulation Reagents Market - Company Share (Percent), 2025 – 2026e

Figure 8-1: South Africa IVD Centralized Diagnostics - Urinalysis Market (Million US\$), 2023 - 2025

Figure 8-2: South Africa IVD Centralized Diagnostics - Forecast for Urinalysis Market (Million US\$), 2026 - 2032

Figure 8-3: South Africa Urinalysis - Qualitative Market (Million US\$), 2023 - 2025 70

Figure 8-4: South Africa Urinalysis - Forecast for Qualitative Market (Million US\$), 2026 - 2032

Figure 8-5: South Africa Urinalysis Qualitative Market - Company Share (Percent), 2025 – 2026e

Figure 8-6: South Africa Urinalysis - Reagents Market (Million US\$), 2023 - 2025

Figure 8-7: South Africa Urinalysis - Forecast for Reagents Market (Million US\$), 2026 - 2032

Figure 8-8: South Africa Urinalysis - Sedimentation Test Market (Million US\$), 2023 - 2025

Figure 8-9: South Africa Urinalysis - Forecast for Sedimentation Test Market (Million US\$), 2026 - 2032

Figure 8-10: South Africa Urinalysis Sedimentation Test Market - Company Share (Percent), 2025 – 2026e

Figure 8-11: South Africa Urinalysis - Instrument Market (Million US\$), 2023 - 2025 78

Figure 8-12: South Africa Urinalysis - Forecast for Instrument Test Market (Million US\$), 2026 - 2032

Figure 9-1: South Africa IVD Centralized Diagnostics - Hematology Market (Million US\$), 2023 - 2025

Figure 9-2: South Africa IVD Centralized Diagnostics - Forecast for Hematology Market (Million US\$), 2026 - 2032

Figure 9-3: South Africa Hematology – Instrument Market (Million US\$), 2023 - 2025

Figure 9-4: South Africa Hematology - Forecast for Instrument Market (Million US\$), 2026 - 2032

Figure 9-5: South Africa Hematology – Cell Blood Count (CBC) Market (Million US\$), 2023 - 2025

Figure 9-6: South Africa Hematology - Forecast for Cell Blood Count (CBC) Market (Million US\$), 2026 - 2032

Figure 9-7: South Africa Cell Blood Count (CBC) Market - Company Share (Percent), 2025 – 2026e

Figure 9-8: South Africa Hematology – Cell Imaging Analysis Market (Million US\$), 2023 - 2025

Figure 9-9: South Africa Hematology - Forecast for Cell Imaging Analysis Market (Million US\$), 2026 - 2032

Figure 9-10: South Africa Hematology – Reagents Market (Million US\$), 2023 - 2025

Figure 9-11: South Africa Hematology - Forecast for Reagents Market (Million US\$), 2026 - 2032

Figure 10-1: South Africa IVD - Rest of Centralized Diagnostics Market (Million US\$), 2023 - 2025

Figure 10-2: South Africa IVD - Forecast for Rest of Centralized Diagnostics Market (Million US\$), 2026 - 2032

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