

Global In Vitro Diagnostics (IVD) Market: Drivers, Opportunities, Trends and Forecasts: 2014 - 2020

<https://marketpublishers.com/r/GAA366D370DEN.html>

Date: June 2017

Pages: 125

Price: US\$ 2,500.00 (Single User License)

ID: GAA366D370DEN

Abstracts

Global In-Vitro Diagnostics Market – Drivers, Opportunities, Trends, and Forecasts: 2017–2023

Overview:

In-vitro diagnostics is a process of diagnosing various medical conditions using assay kits and analyzers. The in-vitro diagnostics (IVD) market is growing at a steady rate as there is an increase in the awareness of various diseases and various plans are initiated by the government to reduce the diseases. Most of the IVD tests are performed in medical and clinical laboratories but the advent of point-of-care (POC) technology has enabled testing to be performed in the presence of the patient and even at their home. This technology advancement is driving market growth during the forecast period.

Factors, such as increasing lifestyle diseases, growing adoption of POC testing, increasing demand for biomarker-based testing and demand from the emerging countries are expected to drive the market growth during the forecast period. The increased sales of counterfeit glucose monitoring strips and stringent regulatory approval processes are factors hampering the market growth.

The regulatory scenario is of concern as there has been a wide range of instruments and assays, which range from Class I to Class III devices. Recently there has been a change in regulations in the European region, which has been a major issue for the market players.

The market is witnessing an emerging trend for noninvasive prenatal testing, next-generation sequencing (NGS), liquid biopsy, and circulating tumor cells test. The

markets in India, Brazil, and China are expected to grow at a rapid pace during the forecast period due to the high prevalence of infectious diseases in these countries.

Market Analysis:

The global in-vitro diagnostics market is estimated to witness a CAGR of 5.31% during the forecast period 2017–2023. The market is analyzed based on five segments – technology, application, test types, end-users, and regions.

Factors, such as increased sales of POC cardiac markers and increased adoption of DNA probe-based diagnostics are growth opportunities for the market players. The market is witnessing an emerging trend of companion diagnostics, cardiac biomarkers, POC markers, and other novel technologies that are helping in diagnosing the diseases at an early stage with precision. There has been a transition from diagnosis in core laboratories to diagnosis in front of the patient.

Regional Analysis:

The regions covered in the in-vitro diagnostics market report are the Americas, EMEA, APAC, and Rest of the World (ROW). The Americas is set to be the leading region for the IVD market growth followed by Europe. Asia Pacific and ROW are set to be the emerging regions. The markets in India, Brazil, and China are expected to grow at a rapid pace during the forecast period as the prevalence of infectious diseases and lifestyle diseases in these countries is high. These countries are set to be the target regions for the market players due to the large untapped potential.

Technology Analysis:

The global IVD market is segmented by the following technologies- immunoassay, clinical chemistry, clinical microbiology, molecular diagnostics, hematology, and coagulation. The clinical chemistry market is currently leading the market with a share of 32.2% due to the high prevalence of diabetes. India has the highest rate of diabetes, making Asia Pacific the region for future investments. The molecular diagnostics segment is expected to have the fastest growth rate during the forecast period. Technological advancements in various molecular diagnostics technology, such as PCR and NGS, are driving the market. The market is also witnessing various M&A and collaborations among the top players, which are defining the future of the global IVD market.

Test Types Analysis:

Core laboratory holds the major share of the market but the advantages of POC technology are expected to make it the fastest growing test type.

Application Analysis:

Among the various diagnostic areas, infectious diseases hold the major share of the market followed by diabetes. But the increasing prevalence of cancer is expected to make it the fastest growing segment.

Key Players:

The leader in IVD market is F. Hoffmann-La Roche, who is currently occupying 20% of the IVD market. Abbott, Siemens, Danaher, and ThermoFisher are the other major players in the market. These top players occupy around 56% of the market. The report covers the following players:

F. Hoffmann-La Roche

ThermoFisher Scientific

Danaher

Siemens Healthineers

Abbott

Sysmex Corporation

Ortho Clinical Diagnostics

Bio-Rad Laboratories

BioMeriux

Becton Dickenson & Company

Competitive Analysis:

The clinical chemistry segment is dominating the global IVD market, and a lot of new players are focusing on developing technologically advanced reagents and analyzers to gain market share. Novel technologies, such as prenatal testing, liquid biopsy, and cardiac biomarkers, are expected to drive the market growth in the future.

Large players, such as F. Hoffmann-La Roche, Danaher, and Abbott, are acquiring companies with products that would complement their existing portfolio. For instance, in November 2016, Danaher acquired Cepheid and in February 2016, Abbott signed an agreement to acquire Alere, a leader in POC technology. Furthermore, most of the companies are aiming to obtain a waiver of the Clinical Laboratory Improvement Amendments of 1988 for their products to increase their sales. Significant investments in R&D in this market is expected to increase, and collaborations and M&A are expected to continue.

Benefits:

The report provides complete details about the usage and the adoption rate of IVD by various end-users and regions. The key stakeholders use this information to know about the major trends, drivers, investments, vertical player's initiatives, and government initiatives towards increasing disease awareness, along with the details of commercial devices available in the market. Moreover, the report provides details about the major challenges that are going to impact the market growth. Additionally, the report gives complete details about business opportunities to key stakeholders to expand their business and increase revenue in the specific vertical and to analyze before investing or expanding business in this market.

Key Stakeholders

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