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Global Point-of-Care Molecular Diagnostic Cartridges Market Growth 2026-2032

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Abstracts

The global Point-of-Care Molecular Diagnostic Cartridges market size is predicted to grow from US$ 2759 million in 2025 to US$ 4885 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

Point-of-Care Molecular Diagnostic Cartridges are single-use in vitro diagnostic consumables designed to operate with dedicated near-patient molecular testing instruments and integrate molecular assay reagents with cartridge, cassette, pouch, tube, chip or equivalent disposable structures. The products primarily use PCR-based or isothermal nucleic acid amplification technologies and may integrate specimen pretreatment, nucleic acid extraction, purification, amplification, signal detection and result generation into a closed workflow. Commercial configurations include fully integrated cartridges that complete most sample-to-answer processes in one disposable unit and split consumable systems that separate extraction and amplification into dedicated components. Individual assays may provide single-analyte detection or multiplex detection of multiple clinically relevant targets. Point-of-Care Molecular Diagnostic Cartridges are mainly used for rapid diagnosis of respiratory infections, tuberculosis, sexually transmitted infections, vaginal infections, perinatal infections and blood-borne viral infections, as well as selected pharmacogenomic applications. Their core value lies in transferring high-sensitivity molecular testing from centralized laboratories toward emergency departments, outpatient clinics, decentralized diagnostic facilities, primary care settings and other near-patient environments while retaining standardized, closed and instrument-controlled testing workflows.

Key Findings

PCR based cartridges remain the dominant product type while isothermal amplification

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is expanding in rapid and low complexity testing

Respiratory infection testing remains one of the largest application clusters while tuberculosis and decentralized STI testing offer substantial incremental demand

Market Trends

The Point-of-Care Molecular Diagnostic Cartridges industry is moving toward shorter turnaround times, deeper workflow integration and broader multiplex menus. Fully enclosed sample-to-answer designs are increasingly used to reduce manual transfer steps and contamination risk, while lyophilized reagents, microfluidic fluid handling and automated assay interpretation support operation outside conventional molecular laboratories. At the same time, platform developers are expanding from single-pathogen assays toward respiratory panels, sexually transmitted infection panels and other syndromic applications, allowing installed instruments to generate a wider recurring consumables base. Rapid PCR remains central to the market, but isothermal amplification platforms are strengthening their position where simplified operation, compact instrumentation and very short response times are prioritized. Another structural trend is the extension of molecular POCT beyond respiratory testing toward tuberculosis, hepatitis, HCV confirmation, women’s health and pharmacogenomic decision support. Commercial adoption is increasingly linked to the ability to deliver actionable results during the same patient encounter rather than simply replacing conventional laboratory PCR with a smaller instrument. bioM?rieux reported that SPOTFIRE test volumes more than doubled in 2025 while its installed base reached 6,400 instruments, illustrating the continued expansion of decentralized multiplex molecular testing.

Market Dynamics

Drivers

Growth in Point-of-Care Molecular Diagnostic Cartridges is supported by the clinical need to shorten the interval between specimen collection, diagnosis and treatment. Respiratory infections create substantial recurring testing demand in emergency, urgent-care and outpatient settings, while tuberculosis programs are driving deployment of molecular tests closer to patients in countries where centralized laboratory access remains limited. WHO reported that only 54% of people newly diagnosed with tuberculosis in 2024 had initially been tested with a WHO-recommended rapid diagnostic test, compared with a target of universal initial rapid testing by 2027, leaving

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significant room for decentralized molecular testing expansion. The installed-base business model also reinforces cartridge demand because each analyzer placement creates recurring consumption of proprietary tests. Expanding menus for STI diagnosis, HCV confirmation, women's health and pharmacogenomics further improve instrument utilization and reduce dependence on a single seasonal application.

Restraints

Market expansion remains constrained by the cost differential between cartridge-based molecular testing and centralized high-throughput PCR, particularly in routine testing environments where turnaround time is less critical. Proprietary analyzer-cartridge architectures also lock customers into platform-specific consumables, which can limit adoption when assay menus are narrow or annual testing volumes are insufficient to justify instrument placement. Reimbursement conditions vary by country and clinical setting, while respiratory assay utilization can fluctuate substantially with seasonal infection intensity. Manufacturers must also maintain stringent lot-to-lot reagent consistency, closed-fluidic reliability and instrument-cartridge compatibility, making quality control and manufacturing validation more demanding than for conventional reagent kits. In price-sensitive public-health markets, competitive procurement places continuing pressure on cartridge ASP, while healthcare systems may favor laboratory consolidation when centralized facilities can provide adequate turnaround and lower unit cost.

Opportunities

The largest incremental opportunities are concentrated in applications where molecular accuracy is clinically valuable but access to conventional PCR laboratories remains insufficient. Tuberculosis represents a major opportunity in primary and decentralized care, particularly across high-burden countries in Asia and Africa. Molbio has deployed more than 10,000 Truenat devices and exports its platform to more than 85 countries, demonstrating that portable molecular systems can scale beyond specialist laboratories. STI testing also offers attractive same-visit applications because rapid CT, NG and other pathogen results can support immediate treatment decisions and reduce loss to follow-up. Additional opportunities are developing in HCV RNA confirmation, maternal and perinatal testing, pharmacogenomic guidance and emerging infectious disease response. Product platforms able to add assays without fundamentally changing installed hardware can capture greater lifetime cartridge consumption and improve the economics of decentralized molecular testing.

Challenges

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The industry faces a persistent balance between molecular-test performance, assay complexity, turnaround time and cost. Multiplex cartridges require more complex primer and probe design, fluid control, reaction optimization and interpretation algorithms, which can increase development time and regulatory burden. Commercial success also depends on achieving sufficient instrument placement because low installed utilization can weaken cartridge economics even when assay performance is strong. Expansion into lower-income markets requires pricing that supports broad public-health procurement while preserving sustainable manufacturing margins. Regulatory fragmentation across the United States, Europe, China and other markets can delay synchronized global launches, and assay-menu differences between jurisdictions may reduce manufacturing scale efficiencies. Supply continuity for enzymes, oligonucleotides, specialty plastics and other diagnostic-grade inputs remains important because cartridge platforms depend on tightly controlled materials and reproducible automated assembly.

Industry Chain Analysis

The upstream segment of the Point-of-Care Molecular Diagnostic Cartridges industry consists primarily of molecular biology reagents, primers and probes, enzymes, lyophilization materials, diagnostic-grade polymers, microfluidic components, electronic and optical components for associated analyzers, and automated manufacturing equipment. Value creation increasingly depends on the interaction between reagent chemistry and cartridge engineering rather than on either element alone. Fluidic architecture must reliably control extraction, reaction transfer and amplification conditions, while reagent formulation must remain stable through production, logistics and storage. Suppliers capable of supporting diagnostic-grade consistency and high-volume automation therefore play a critical role in scaling commercial platforms.

The midstream segment covers assay development, cartridge design, instrument development, automated filling and sealing, assembly, quality control, regulatory registration and commercial manufacturing. Recurring value is concentrated in disposable tests after instruments are installed, making cartridge utilization a critical commercial metric. Molbio disclosed installed annual capacity of 39 million Truenat test kits as of March 2025, with substantial unused capacity available for further growth, illustrating the scale required by established decentralized molecular platforms. Downstream demand comes from emergency departments, outpatient clinics, decentralized hospital laboratories, primary-care facilities, infectious-disease programs and other near-patient settings where faster molecular results can affect clinical decisions during the same encounter.

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Segment Insights

By product type, PCR Molecular Diagnostic Cartridges remain the principal technology segment because real-time PCR is well established clinically, supports both single-analyte and multiplex testing and is used across major platforms for respiratory disease, tuberculosis, STI and other infectious-disease applications. Isothermal Amplification Molecular Diagnostic Cartridges form a smaller but strategically important segment, particularly in compact systems designed for simplified workflows and short turnaround times. The competitive distinction is increasingly based not only on amplification chemistry but also on how effectively the disposable integrates sample preparation, reaction control and result interpretation.

By consumable architecture, Fully Integrated Cartridges generally provide the strongest sample-to-answer workflow and are particularly suited to decentralized environments where operator intervention must be minimized. Split Consumable Systems remain commercially relevant where separate extraction and amplification components can reduce manufacturing cost or provide greater platform flexibility. In analyte structure, Single Analyte Cartridges continue to serve high-volume targeted applications, while Multiplex Cartridges are gaining importance in respiratory and syndromic testing because one patient presentation may correspond to several pathogens with similar symptoms. Multiplexing can increase clinical information per test, although higher assay complexity generally raises cartridge design and validation requirements.

Downstream Market Opportunities

Downstream opportunity is shifting from broad institutional adoption toward highly specific clinical workflows. In emergency and urgent-care respiratory testing, molecular cartridges can distinguish influenza, SARS-CoV-2, RSV and other pathogens during the patient encounter and support faster isolation or treatment decisions. In tuberculosis, portable systems can extend molecular diagnosis to district hospitals and primary diagnostic sites that lack full laboratory infrastructure; WHO data show that rapid molecular testing coverage remains materially below universal access in many high-burden countries. In sexual-health services, same-visit molecular testing for CT, NG and related pathogens can reduce delayed treatment and patient loss to follow-up. Additional high-value use cases include intrapartum GBS assessment, HCV RNA confirmation and rapid pharmacogenomic testing before antiplatelet or antibiotic therapy. These applications favor platforms that combine short turnaround, simple operation and broad assay menus rather than instruments optimized for a single episodic disease.

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Regional Insights

North America remains the most developed high-value regional market for Point-of-Care Molecular Diagnostic Cartridges, supported by a large installed base of molecular POCT instruments, extensive use of rapid respiratory testing and a regulatory pathway that allows selected tests to obtain CLIA-waived status for decentralized operation. The region also contains a high concentration of established and emerging manufacturers, supporting frequent product launches and menu expansion. Europe has a similarly advanced clinical environment but displays greater variation in procurement models and decentralized testing practices across countries; Germany, France, Italy, Belgium and the United Kingdom are notable centers of product development and manufacturing.

Asia-Pacific represents the strongest incremental volume opportunity. China has built a broad domestic molecular-diagnostics manufacturing base, while South Korea and Japan support established cartridge platforms and specialized near-patient products. India is particularly important for decentralized infectious-disease testing because portable PCR is being deployed at scale for tuberculosis and other public-health applications. Molbio reports exports to more than 85 countries, illustrating the growing role of India-based platforms in emerging markets. Southeast Asia also offers expansion potential through infectious-disease programs and decentralized diagnostic networks. Africa is primarily a demand-side opportunity rather than a major manufacturing cluster, with tuberculosis and other communicable-disease programs creating long-term need for affordable, portable molecular testing.

Competitive Landscape Analysis

The verified core competitive landscape comprises 27 manufacturers and combines multinational diagnostics groups with regional molecular-POCT specialists. Large established participants such as Cepheid, Roche Molecular Systems, BioFire Diagnostics, Abbott Diagnostics Scarborough, DiaSorin Molecular and Bosch Healthcare Solutions compete through extensive regulatory experience, installed instrument bases, assay development capabilities and established clinical channels. SD BIOSENSOR has strengthened the Asian molecular POCT position through the STANDARD M10 platform, while Molbio Diagnostics has developed a differentiated model centered on portable PCR and high-volume deployment in decentralized and public-health environments. Chinese manufacturers including Wondfo, Sansure Biotech, Coyote Bioscience, Ustar Biotechnologies, Xi’an Tianlong and other confirmed producers increasingly compete on integrated cartridge design, domestic manufacturing and expanding assay menus. The market is therefore not characterized by a single

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competitive model: global groups emphasize installed-base scale and broad clinical access, regional producers emphasize cost, portability and localized menus, while smaller specialists compete in multiplex respiratory testing, pharmacogenomics and other focused applications. Competitive advantage increasingly depends on the combination of assay breadth, cartridge manufacturing scale, regulatory reach, analyzer utilization and recurring test economics rather than instrument performance alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Point-of-Care Molecular Diagnostic Cartridges Industry Forecast” looks at past sales and reviews total world Point-of-Care Molecular Diagnostic Cartridges sales in 2025, providing a comprehensive analysis by region and market sector of projected Point-of-Care Molecular Diagnostic Cartridges sales for 2026 through 2032. With Point-of-Care Molecular Diagnostic Cartridges sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Point-of-Care Molecular Diagnostic Cartridges industry.

This Insight Report provides a comprehensive analysis of the global Point-of-Care Molecular Diagnostic Cartridges landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Point-of-Care Molecular Diagnostic Cartridges portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Point-of-Care Molecular Diagnostic Cartridges market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Point-of-Care Molecular Diagnostic Cartridges and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Point-of-Care Molecular Diagnostic Cartridges.

This report presents a comprehensive overview, market shares, and growth opportunities of Point-of-Care Molecular Diagnostic Cartridges market by product type, application, key manufacturers and key regions and countries.

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Market Segmentation

Segmentation by Type:

PCR Molecular Diagnostic Cartridge

Isothermal Amplification Molecular Diagnostic Cartridge

Other

Segmentation by Analyte Multiplexing Level:

Single Analyte Cartridge

Multiplex Cartridge

Other

Segmentation by Application:

Respiratory Infection Diagnosis

Tuberculosis Diagnosis

Sexually Transmitted Infection Diagnosis

Vaginal Infection Diagnosis

Maternal Perinatal Infection Screening

Blood Borne Viral Infection Diagnosis

Pharmacogenomic Therapy Guidance

Other

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa

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Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Cepheid

Roche Molecular Systems, Inc.

BioFire Diagnostics, LLC

Abbott Diagnostics Scarborough, Inc.

LEX Diagnostics Limited

DiaSorin Molecular LLC

Bosch Healthcare Solutions GmbH

SD BIOSENSOR, Inc.

Guangzhou Wondfo Biotech Co., Ltd.

Sansure Biotech Inc.

Molbio Diagnostics Limited

MIZUHO MEDY Co., Ltd.

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Coyote Bioscience Co., Ltd.

Rocgene Beijing Scientific Instruments Co., Ltd.

Credo Diagnostics Biomedical Pte. Ltd.

miDiagnostics NV

GeneReach Biotechnology Corp.

Ustar Biotechnologies Hangzhou Ltd.

BIONEER CORPORATION

Diagnostics for the Real World Ltd.

Xi'an Tianlong Science and Technology Co., Ltd.

Baebies, Inc.

Autonomous Medical Devices Incorporated

Nuclein, LLC

Genedrive Diagnostics Ltd

Igenesis Shanghai Co., Ltd.

Guangzhou Pluslife Biotech Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Point-of-Care Molecular Diagnostic Cartridges market?

What factors are driving Point-of-Care Molecular Diagnostic Cartridges market

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growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Point-of-Care Molecular Diagnostic Cartridges market opportunities vary by end market size?

How does Point-of-Care Molecular Diagnostic Cartridges break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Point-of-Care Molecular Diagnostic Cartridges Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Point-of-Care Molecular Diagnostic Cartridges by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Point-of-Care Molecular Diagnostic Cartridges by Country/Region, 2021, 2025 & 2032
2.2 Point-of-Care Molecular Diagnostic Cartridges Segment by Type
  2.2.1 PCR Molecular Diagnostic Cartridge
  2.2.2 Isothermal Amplification Molecular Diagnostic Cartridge
  2.2.3 Other
  2.2.4 Point-of-Care Molecular Diagnostic Cartridges Sales by Type
    2.2.4.1 Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Point-of-Care Molecular Diagnostic Cartridges Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Type (2021-2026)
2.3 Point-of-Care Molecular Diagnostic Cartridges Segment by Analyte Multiplexing Level
  2.3.1 Single Analyte Cartridge
  2.3.2 Multiplex Cartridge
  2.3.3 Other
  2.3.4 Point-of-Care Molecular Diagnostic Cartridges Sales by Analyte Multiplexing Level

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2.3.4.1 Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Analyte Multiplexing Level (2021-2026)
2.3.4.2 Global Point-of-Care Molecular Diagnostic Cartridges Revenue and Market Share by Analyte Multiplexing Level (2021-2026)
2.3.4.3 Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Analyte Multiplexing Level (2021-2026)
2.4 Point-of-Care Molecular Diagnostic Cartridges Segment by Application
2.4.1 Respiratory Infection Diagnosis
2.4.2 Tuberculosis Diagnosis
2.4.3 Sexually Transmitted Infection Diagnosis
2.4.4 Vaginal Infection Diagnosis
2.4.5 Maternal Perinatal Infection Screening
2.4.6 Blood Borne Viral Infection Diagnosis
2.4.7 Pharmacogenomic Therapy Guidance
2.4.8 Other
2.4.9 Point-of-Care Molecular Diagnostic Cartridges Sales by Application
2.4.9.1 Global Point-of-Care Molecular Diagnostic Cartridges Sale Market Share by Application (2021-2026)
2.4.9.2 Global Point-of-Care Molecular Diagnostic Cartridges Revenue and Market Share by Application (2021-2026)
2.4.9.3 Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Point-of-Care Molecular Diagnostic Cartridges Breakdown Data by Company
3.1.1 Global Point-of-Care Molecular Diagnostic Cartridges Annual Sales by Company (2021-2026)
3.1.2 Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Company (2021-2026)
3.2 Global Point-of-Care Molecular Diagnostic Cartridges Annual Revenue by Company (2021-2026)
3.2.1 Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Company (2021-2026)
3.2.2 Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Company (2021-2026)
3.3 Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Company
3.4 Key Manufacturers Point-of-Care Molecular Diagnostic Cartridges Producing Area Distribution, Sales Area, Product Type

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info@marketpublishers.com

3.4.1 Key Manufacturers Point-of-Care Molecular Diagnostic Cartridges Product Location Distribution
3.4.2 Players Point-of-Care Molecular Diagnostic Cartridges Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR POINT-OF-CARE MOLECULAR DIAGNOSTIC CARTRIDGES BY GEOGRAPHIC REGION

4.1 World Historic Point-of-Care Molecular Diagnostic Cartridges Market Size by Geographic Region (2021-2026)
4.1.1 Global Point-of-Care Molecular Diagnostic Cartridges Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Point-of-Care Molecular Diagnostic Cartridges Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Point-of-Care Molecular Diagnostic Cartridges Market Size by Country/Region (2021-2026)
4.2.1 Global Point-of-Care Molecular Diagnostic Cartridges Annual Sales by Country/Region (2021-2026)
4.2.2 Global Point-of-Care Molecular Diagnostic Cartridges Annual Revenue by Country/Region (2021-2026)
4.3 Americas Point-of-Care Molecular Diagnostic Cartridges Sales Growth
4.4 APAC Point-of-Care Molecular Diagnostic Cartridges Sales Growth
4.5 Europe Point-of-Care Molecular Diagnostic Cartridges Sales Growth
4.6 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales Growth

5 AMERICAS

5.1 Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Country
5.1.1 Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Country (2021-2026)
5.1.2 Americas Point-of-Care Molecular Diagnostic Cartridges Revenue by Country (2021-2026)
5.2 Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026)
5.3 Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026)

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5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Region
6.1.1 APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Region (2021-2026)
6.1.2 APAC Point-of-Care Molecular Diagnostic Cartridges Revenue by Region (2021-2026)
6.2 APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026)
6.3 APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Point-of-Care Molecular Diagnostic Cartridges by Country
7.1.1 Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Country (2021-2026)
7.1.2 Europe Point-of-Care Molecular Diagnostic Cartridges Revenue by Country (2021-2026)
7.2 Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026)
7.3 Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

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8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges by Country
8.1.1 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Country (2021-2026)
8.1.2 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Revenue by Country (2021-2026)
8.2 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026)
8.3 Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Point-of-Care Molecular Diagnostic Cartridges
10.3 Manufacturing Process Analysis of Point-of-Care Molecular Diagnostic Cartridges
10.4 Industry Chain Structure of Point-of-Care Molecular Diagnostic Cartridges

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Point-of-Care Molecular Diagnostic Cartridges Distributors
11.3 Point-of-Care Molecular Diagnostic Cartridges Customer

+357 96 030922
info@marketpublishers.com

12 WORLD FORECAST REVIEW FOR POINT-OF-CARE MOLECULAR DIAGNOSTIC CARTRIDGES BY GEOGRAPHIC REGION

12.1 Global Point-of-Care Molecular Diagnostic Cartridges Market Size Forecast by Region
12.1.1 Global Point-of-Care Molecular Diagnostic Cartridges Forecast by Region (2027-2032)
12.1.2 Global Point-of-Care Molecular Diagnostic Cartridges Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Point-of-Care Molecular Diagnostic Cartridges Forecast by Type (2027-2032)
12.7 Global Point-of-Care Molecular Diagnostic Cartridges Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Cepheid
13.1.1 Cepheid Company Information
13.1.2 Cepheid Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.1.3 Cepheid Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Cepheid Main Business Overview
13.1.5 Cepheid Latest Developments
13.2 Roche Molecular Systems, Inc.
13.2.1 Roche Molecular Systems, Inc. Company Information
13.2.2 Roche Molecular Systems, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.2.3 Roche Molecular Systems, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Roche Molecular Systems, Inc. Main Business Overview
13.2.5 Roche Molecular Systems, Inc. Latest Developments
13.3 BioFire Diagnostics, LLC
13.3.1 BioFire Diagnostics, LLC Company Information
13.3.2 BioFire Diagnostics, LLC Point-of-Care Molecular Diagnostic Cartridges

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Product Portfolios and Specifications
13.3.3 BioFire Diagnostics, LLC Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 BioFire Diagnostics, LLC Main Business Overview
13.3.5 BioFire Diagnostics, LLC Latest Developments
13.4 Abbott Diagnostics Scarborough, Inc.
13.4.1 Abbott Diagnostics Scarborough, Inc. Company Information
13.4.2 Abbott Diagnostics Scarborough, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.4.3 Abbott Diagnostics Scarborough, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Abbott Diagnostics Scarborough, Inc. Main Business Overview
13.4.5 Abbott Diagnostics Scarborough, Inc. Latest Developments
13.5 LEX Diagnostics Limited
13.5.1 LEX Diagnostics Limited Company Information
13.5.2 LEX Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.5.3 LEX Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 LEX Diagnostics Limited Main Business Overview
13.5.5 LEX Diagnostics Limited Latest Developments
13.6 DiaSorin Molecular LLC
13.6.1 DiaSorin Molecular LLC Company Information
13.6.2 DiaSorin Molecular LLC Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.6.3 DiaSorin Molecular LLC Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 DiaSorin Molecular LLC Main Business Overview
13.6.5 DiaSorin Molecular LLC Latest Developments
13.7 Bosch Healthcare Solutions GmbH
13.7.1 Bosch Healthcare Solutions GmbH Company Information
13.7.2 Bosch Healthcare Solutions GmbH Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.7.3 Bosch Healthcare Solutions GmbH Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Bosch Healthcare Solutions GmbH Main Business Overview
13.7.5 Bosch Healthcare Solutions GmbH Latest Developments
13.8 SD BIOSENSOR, Inc.
13.8.1 SD BIOSENSOR, Inc. Company Information

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13.8.2 SD BIOSENSOR, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.8.3 SD BIOSENSOR, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 SD BIOSENSOR, Inc. Main Business Overview
13.8.5 SD BIOSENSOR, Inc. Latest Developments
13.9 Guangzhou Wondfo Biotech Co., Ltd.
13.9.1 Guangzhou Wondfo Biotech Co., Ltd. Company Information
13.9.2 Guangzhou Wondfo Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.9.3 Guangzhou Wondfo Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Guangzhou Wondfo Biotech Co., Ltd. Main Business Overview
13.9.5 Guangzhou Wondfo Biotech Co., Ltd. Latest Developments
13.10 Sansure Biotech Inc.
13.10.1 Sansure Biotech Inc. Company Information
13.10.2 Sansure Biotech Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.10.3 Sansure Biotech Inc. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Sansure Biotech Inc. Main Business Overview
13.10.5 Sansure Biotech Inc. Latest Developments
13.11 Molbio Diagnostics Limited
13.11.1 Molbio Diagnostics Limited Company Information
13.11.2 Molbio Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.11.3 Molbio Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Molbio Diagnostics Limited Main Business Overview
13.11.5 Molbio Diagnostics Limited Latest Developments
13.12 MIZUHO MEDY Co., Ltd.
13.12.1 MIZUHO MEDY Co., Ltd. Company Information
13.12.2 MIZUHO MEDY Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.12.3 MIZUHO MEDY Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 MIZUHO MEDY Co., Ltd. Main Business Overview
13.12.5 MIZUHO MEDY Co., Ltd. Latest Developments
13.13 Coyote Bioscience Co., Ltd.

+357 96 030922
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13.13.1 Coyote Bioscience Co., Ltd. Company Information
13.13.2 Coyote Bioscience Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.13.3 Coyote Bioscience Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Coyote Bioscience Co., Ltd. Main Business Overview
13.13.5 Coyote Bioscience Co., Ltd. Latest Developments
13.14 Rocgene Beijing Scientific Instruments Co., Ltd.
13.14.1 Rocgene Beijing Scientific Instruments Co., Ltd. Company Information
13.14.2 Rocgene Beijing Scientific Instruments Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.14.3 Rocgene Beijing Scientific Instruments Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Rocgene Beijing Scientific Instruments Co., Ltd. Main Business Overview
13.14.5 Rocgene Beijing Scientific Instruments Co., Ltd. Latest Developments
13.15 Credo Diagnostics Biomedical Pte. Ltd.
13.15.1 Credo Diagnostics Biomedical Pte. Ltd. Company Information
13.15.2 Credo Diagnostics Biomedical Pte. Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.15.3 Credo Diagnostics Biomedical Pte. Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Credo Diagnostics Biomedical Pte. Ltd. Main Business Overview
13.15.5 Credo Diagnostics Biomedical Pte. Ltd. Latest Developments
13.16 miDiagnostics NV
13.16.1 miDiagnostics NV Company Information
13.16.2 miDiagnostics NV Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.16.3 miDiagnostics NV Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 miDiagnostics NV Main Business Overview
13.16.5 miDiagnostics NV Latest Developments
13.17 GeneReach Biotechnology Corp.
13.17.1 GeneReach Biotechnology Corp. Company Information
13.17.2 GeneReach Biotechnology Corp. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.17.3 GeneReach Biotechnology Corp. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 GeneReach Biotechnology Corp. Main Business Overview
13.17.5 GeneReach Biotechnology Corp. Latest Developments

+357 96 030922
info@marketpublishers.com

13.18 Ustar Biotechnologies Hangzhou Ltd.
13.18.1 Ustar Biotechnologies Hangzhou Ltd. Company Information
13.18.2 Ustar Biotechnologies Hangzhou Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.18.3 Ustar Biotechnologies Hangzhou Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Ustar Biotechnologies Hangzhou Ltd. Main Business Overview
13.18.5 Ustar Biotechnologies Hangzhou Ltd. Latest Developments
13.19 BIONEER CORPORATION
13.19.1 BIONEER CORPORATION Company Information
13.19.2 BIONEER CORPORATION Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.19.3 BIONEER CORPORATION Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 BIONEER CORPORATION Main Business Overview
13.19.5 BIONEER CORPORATION Latest Developments
13.20 Diagnostics for the Real World Ltd.
13.20.1 Diagnostics for the Real World Ltd. Company Information
13.20.2 Diagnostics for the Real World Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.20.3 Diagnostics for the Real World Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Diagnostics for the Real World Ltd. Main Business Overview
13.20.5 Diagnostics for the Real World Ltd. Latest Developments
13.21 Xi'an Tianlong Science and Technology Co., Ltd.
13.21.1 Xi'an Tianlong Science and Technology Co., Ltd. Company Information
13.21.2 Xi'an Tianlong Science and Technology Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.21.3 Xi'an Tianlong Science and Technology Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Xi'an Tianlong Science and Technology Co., Ltd. Main Business Overview
13.21.5 Xi'an Tianlong Science and Technology Co., Ltd. Latest Developments
13.22 Baebies, Inc.
13.22.1 Baebies, Inc. Company Information
13.22.2 Baebies, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.22.3 Baebies, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Baebies, Inc. Main Business Overview

+357 96 030922
info@marketpublishers.com

13.22.5 Baebies, Inc. Latest Developments
13.23 Autonomous Medical Devices Incorporated
13.23.1 Autonomous Medical Devices Incorporated Company Information
13.23.2 Autonomous Medical Devices Incorporated Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.23.3 Autonomous Medical Devices Incorporated Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 Autonomous Medical Devices Incorporated Main Business Overview
13.23.5 Autonomous Medical Devices Incorporated Latest Developments
13.24 Nuclein, LLC
13.24.1 Nuclein, LLC Company Information
13.24.2 Nuclein, LLC Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.24.3 Nuclein, LLC Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 Nuclein, LLC Main Business Overview
13.24.5 Nuclein, LLC Latest Developments
13.25 Genedrive Diagnostics Ltd
13.25.1 Genedrive Diagnostics Ltd Company Information
13.25.2 Genedrive Diagnostics Ltd Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.25.3 Genedrive Diagnostics Ltd Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 Genedrive Diagnostics Ltd Main Business Overview
13.25.5 Genedrive Diagnostics Ltd Latest Developments
13.26 Igenesis Shanghai Co., Ltd.
13.26.1 Igenesis Shanghai Co., Ltd. Company Information
13.26.2 Igenesis Shanghai Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.26.3 Igenesis Shanghai Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 Igenesis Shanghai Co., Ltd. Main Business Overview
13.26.5 Igenesis Shanghai Co., Ltd. Latest Developments
13.27 Guangzhou Pluslife Biotech Co., Ltd.
13.27.1 Guangzhou Pluslife Biotech Co., Ltd. Company Information
13.27.2 Guangzhou Pluslife Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
13.27.3 Guangzhou Pluslife Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales, Revenue, Price and Gross Margin (2021-2026)

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info@marketpublishers.com

13.27.4 Guangzhou Pluslife Biotech Co., Ltd. Main Business Overview
13.27.5 Guangzhou Pluslife Biotech Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Point-of-Care Molecular Diagnostic Cartridges Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Point-of-Care Molecular Diagnostic Cartridges Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of PCR Molecular Diagnostic Cartridge
Table 4. Major Players of Isothermal Amplification Molecular Diagnostic Cartridge
Table 5. Major Players of Other
Table 6. Global Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026) & (Units)
Table 7. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type (2021-2026)
Table 8. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Type (2021-2026) & ($ million)
Table 9. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Type (2021-2026)
Table 10. Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of Single Analyte Cartridge
Table 12. Major Players of Multiplex Cartridge
Table 13. Major Players of Other
Table 14. Global Point-of-Care Molecular Diagnostic Cartridges Sales by Analyte Multiplexing Level (2021-2026) & (Units)
Table 15. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Analyte Multiplexing Level (2021-2026)
Table 16. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Analyte Multiplexing Level (2021-2026) & ($ million)
Table 17. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Analyte Multiplexing Level (2021-2026)
Table 18. Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Analyte Multiplexing Level (2021-2026) & (US$/Unit)
Table 19. Global Point-of-Care Molecular Diagnostic Cartridges Sale by Application (2021-2026) & (Units)
Table 20. Global Point-of-Care Molecular Diagnostic Cartridges Sale Market Share by Application (2021-2026)
Table 21. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Application

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(2021-2026) & ($ million)
Table 22. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Application (2021-2026)
Table 23. Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Application (2021-2026) & (US$/Unit)
Table 24. Global Point-of-Care Molecular Diagnostic Cartridges Sales by Company (2021-2026) & (Units)
Table 25. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Company (2021-2026)
Table 26. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Company (2021-2026) & ($ millions)
Table 27. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Company (2021-2026)
Table 28. Global Point-of-Care Molecular Diagnostic Cartridges Sale Price by Company (2021-2026) & (US$/Unit)
Table 29. Key Manufacturers Point-of-Care Molecular Diagnostic Cartridges Producing Area Distribution and Sales Area
Table 30. Players Point-of-Care Molecular Diagnostic Cartridges Products Offered
Table 31. Point-of-Care Molecular Diagnostic Cartridges Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 32. New Products and Potential Entrants
Table 33. Market M&A Activity & Strategy
Table 34. Global Point-of-Care Molecular Diagnostic Cartridges Sales by Geographic Region (2021-2026) & (Units)
Table 35. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share Geographic Region (2021-2026)
Table 36. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Geographic Region (2021-2026) & ($ millions)
Table 37. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Geographic Region (2021-2026)
Table 38. Global Point-of-Care Molecular Diagnostic Cartridges Sales by Country/Region (2021-2026) & (Units)
Table 39. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country/Region (2021-2026)
Table 40. Global Point-of-Care Molecular Diagnostic Cartridges Revenue by Country/Region (2021-2026) & ($ millions)
Table 41. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Country/Region (2021-2026)
Table 42. Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Country

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(2021-2026) & (Units)
Table 43. Americas Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country (2021-2026)
Table 44. Americas Point-of-Care Molecular Diagnostic Cartridges Revenue by Country (2021-2026) & ($ millions)
Table 45. Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026) & (Units)
Table 46. Americas Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026) & (Units)
Table 47. APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Region (2021-2026) & (Units)
Table 48. APAC Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Region (2021-2026)
Table 49. APAC Point-of-Care Molecular Diagnostic Cartridges Revenue by Region (2021-2026) & ($ millions)
Table 50. APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026) & (Units)
Table 51. APAC Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026) & (Units)
Table 52. Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Country (2021-2026) & (Units)
Table 53. Europe Point-of-Care Molecular Diagnostic Cartridges Revenue by Country (2021-2026) & ($ millions)
Table 54. Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026) & (Units)
Table 55. Europe Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026) & (Units)
Table 56. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Country (2021-2026) & (Units)
Table 57. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Country (2021-2026)
Table 58. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Type (2021-2026) & (Units)
Table 59. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales by Application (2021-2026) & (Units)
Table 60. Key Market Drivers & Growth Opportunities of Point-of-Care Molecular Diagnostic Cartridges
Table 61. Key Market Challenges & Risks of Point-of-Care Molecular Diagnostic Cartridges

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Table 62. Key Industry Trends of Point-of-Care Molecular Diagnostic Cartridges
Table 63. Point-of-Care Molecular Diagnostic Cartridges Raw Material
Table 64. Key Suppliers of Raw Materials
Table 65. Point-of-Care Molecular Diagnostic Cartridges Distributors List
Table 66. Point-of-Care Molecular Diagnostic Cartridges Customer List
Table 67. Global Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Region (2027-2032) & (Units)
Table 68. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Forecast by Region (2027-2032) & ($ millions)
Table 69. Americas Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Country (2027-2032) & (Units)
Table 70. Americas Point-of-Care Molecular Diagnostic Cartridges Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 71. APAC Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Region (2027-2032) & (Units)
Table 72. APAC Point-of-Care Molecular Diagnostic Cartridges Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 73. Europe Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Country (2027-2032) & (Units)
Table 74. Europe Point-of-Care Molecular Diagnostic Cartridges Revenue Forecast by Country (2027-2032) & ($ millions)
Table 75. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Country (2027-2032) & (Units)
Table 76. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. Global Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Type (2027-2032) & (Units)
Table 78. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Forecast by Type (2027-2032) & ($ millions)
Table 79. Global Point-of-Care Molecular Diagnostic Cartridges Sales Forecast by Application (2027-2032) & (Units)
Table 80. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Forecast by Application (2027-2032) & ($ millions)
Table 81. Cepheid Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 82. Cepheid Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 83. Cepheid Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 84. Cepheid Main Business
Table 85. Cepheid Latest Developments
Table 86. Roche Molecular Systems, Inc. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 87. Roche Molecular Systems, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 88. Roche Molecular Systems, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 89. Roche Molecular Systems, Inc. Main Business
Table 90. Roche Molecular Systems, Inc. Latest Developments
Table 91. BioFire Diagnostics, LLC Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 92. BioFire Diagnostics, LLC Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 93. BioFire Diagnostics, LLC Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 94. BioFire Diagnostics, LLC Main Business
Table 95. BioFire Diagnostics, LLC Latest Developments
Table 96. Abbott Diagnostics Scarborough, Inc. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 97. Abbott Diagnostics Scarborough, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 98. Abbott Diagnostics Scarborough, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 99. Abbott Diagnostics Scarborough, Inc. Main Business
Table 100. Abbott Diagnostics Scarborough, Inc. Latest Developments
Table 101. LEX Diagnostics Limited Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 102. LEX Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 103. LEX Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 104. LEX Diagnostics Limited Main Business
Table 105. LEX Diagnostics Limited Latest Developments
Table 106. DiaSorin Molecular LLC Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 107. DiaSorin Molecular LLC Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications

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Table 108. DiaSorin Molecular LLC Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 109. DiaSorin Molecular LLC Main Business
Table 110. DiaSorin Molecular LLC Latest Developments
Table 111. Bosch Healthcare Solutions GmbH Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 112. Bosch Healthcare Solutions GmbH Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 113. Bosch Healthcare Solutions GmbH Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 114. Bosch Healthcare Solutions GmbH Main Business
Table 115. Bosch Healthcare Solutions GmbH Latest Developments
Table 116. SD BIOSENSOR, Inc. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 117. SD BIOSENSOR, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 118. SD BIOSENSOR, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 119. SD BIOSENSOR, Inc. Main Business
Table 120. SD BIOSENSOR, Inc. Latest Developments
Table 121. Guangzhou Wondfo Biotech Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 122. Guangzhou Wondfo Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 123. Guangzhou Wondfo Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 124. Guangzhou Wondfo Biotech Co., Ltd. Main Business
Table 125. Guangzhou Wondfo Biotech Co., Ltd. Latest Developments
Table 126. Sansure Biotech Inc. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 127. Sansure Biotech Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 128. Sansure Biotech Inc. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 129. Sansure Biotech Inc. Main Business
Table 130. Sansure Biotech Inc. Latest Developments
Table 131. Molbio Diagnostics Limited Basic Information, Point-of-Care Molecular

+357 96 030922
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Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 132. Molbio Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 133. Molbio Diagnostics Limited Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 134. Molbio Diagnostics Limited Main Business
Table 135. Molbio Diagnostics Limited Latest Developments
Table 136. MIZUHO MEDY Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 137. MIZUHO MEDY Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 138. MIZUHO MEDY Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 139. MIZUHO MEDY Co., Ltd. Main Business
Table 140. MIZUHO MEDY Co., Ltd. Latest Developments
Table 141. Coyote Bioscience Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 142. Coyote Bioscience Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 143. Coyote Bioscience Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 144. Coyote Bioscience Co., Ltd. Main Business
Table 145. Coyote Bioscience Co., Ltd. Latest Developments
Table 146. Rocgene Beijing Scientific Instruments Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 147. Rocgene Beijing Scientific Instruments Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 148. Rocgene Beijing Scientific Instruments Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 149. Rocgene Beijing Scientific Instruments Co., Ltd. Main Business
Table 150. Rocgene Beijing Scientific Instruments Co., Ltd. Latest Developments
Table 151. Credo Diagnostics Biomedical Pte. Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 152. Credo Diagnostics Biomedical Pte. Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 153. Credo Diagnostics Biomedical Pte. Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin

+357 96 030922
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(2021-2026)
Table 154. Credo Diagnostics Biomedical Pte. Ltd. Main Business
Table 155. Credo Diagnostics Biomedical Pte. Ltd. Latest Developments
Table 156. miDiagnostics NV Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 157. miDiagnostics NV Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 158. miDiagnostics NV Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 159. miDiagnostics NV Main Business
Table 160. miDiagnostics NV Latest Developments
Table 161. GeneReach Biotechnology Corp. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 162. GeneReach Biotechnology Corp. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 163. GeneReach Biotechnology Corp. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 164. GeneReach Biotechnology Corp. Main Business
Table 165. GeneReach Biotechnology Corp. Latest Developments
Table 166. Ustar Biotechnologies Hangzhou Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 167. Ustar Biotechnologies Hangzhou Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 168. Ustar Biotechnologies Hangzhou Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 169. Ustar Biotechnologies Hangzhou Ltd. Main Business
Table 170. Ustar Biotechnologies Hangzhou Ltd. Latest Developments
Table 171. BIONEER CORPORATION Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 172. BIONEER CORPORATION Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 173. BIONEER CORPORATION Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 174. BIONEER CORPORATION Main Business
Table 175. BIONEER CORPORATION Latest Developments
Table 176. Diagnostics for the Real World Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
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Table 177. Diagnostics for the Real World Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 178. Diagnostics for the Real World Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 179. Diagnostics for the Real World Ltd. Main Business
Table 180. Diagnostics for the Real World Ltd. Latest Developments
Table 181. Xi'an Tianlong Science and Technology Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 182. Xi'an Tianlong Science and Technology Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 183. Xi'an Tianlong Science and Technology Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 184. Xi'an Tianlong Science and Technology Co., Ltd. Main Business
Table 185. Xi'an Tianlong Science and Technology Co., Ltd. Latest Developments
Table 186. Baebies, Inc. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 187. Baebies, Inc. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 188. Baebies, Inc. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 189. Baebies, Inc. Main Business
Table 190. Baebies, Inc. Latest Developments
Table 191. Autonomous Medical Devices Incorporated Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 192. Autonomous Medical Devices Incorporated Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 193. Autonomous Medical Devices Incorporated Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 194. Autonomous Medical Devices Incorporated Main Business
Table 195. Autonomous Medical Devices Incorporated Latest Developments
Table 196. Nuclein, LLC Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 197. Nuclein, LLC Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 198. Nuclein, LLC Point-of-Care Molecular Diagnostic Cartridges Sales (Units),

+357 96 030922
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Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 199. Nuclein, LLC Main Business
Table 200. Nuclein, LLC Latest Developments
Table 201. Genedrive Diagnostics Ltd Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 202. Genedrive Diagnostics Ltd Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 203. Genedrive Diagnostics Ltd Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 204. Genedrive Diagnostics Ltd Main Business
Table 205. Genedrive Diagnostics Ltd Latest Developments
Table 206. Igenesis Shanghai Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 207. Igenesis Shanghai Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 208. Igenesis Shanghai Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 209. Igenesis Shanghai Co., Ltd. Main Business
Table 210. Igenesis Shanghai Co., Ltd. Latest Developments
Table 211. Guangzhou Pluslife Biotech Co., Ltd. Basic Information, Point-of-Care Molecular Diagnostic Cartridges Manufacturing Base, Sales Area and Its Competitors
Table 212. Guangzhou Pluslife Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Product Portfolios and Specifications
Table 213. Guangzhou Pluslife Biotech Co., Ltd. Point-of-Care Molecular Diagnostic Cartridges Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 214. Guangzhou Pluslife Biotech Co., Ltd. Main Business
Table 215. Guangzhou Pluslife Biotech Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Point-of-Care Molecular Diagnostic Cartridges
Figure 2. Point-of-Care Molecular Diagnostic Cartridges Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Point-of-Care Molecular Diagnostic Cartridges Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Point-of-Care Molecular Diagnostic Cartridges Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country/Region (2025)
Figure 10. Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of PCR Molecular Diagnostic Cartridge
Figure 12. Product Picture of Isothermal Amplification Molecular Diagnostic Cartridge
Figure 13. Product Picture of Other
Figure 14. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type in 2026
Figure 15. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of Single Analyte Cartridge
Figure 17. Product Picture of Multiplex Cartridge
Figure 18. Product Picture of Other
Figure 19. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Analyte Multiplexing Level in 2026
Figure 20. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Analyte Multiplexing Level (2021-2026)
Figure 21. Point-of-Care Molecular Diagnostic Cartridges Consumed in Respiratory Infection Diagnosis
Figure 22. Global Point-of-Care Molecular Diagnostic Cartridges Market: Respiratory Infection Diagnosis (2021-2026) & (Units)
Figure 23. Point-of-Care Molecular Diagnostic Cartridges Consumed in Tuberculosis Diagnosis

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Figure 24. Global Point-of-Care Molecular Diagnostic Cartridges Market: Tuberculosis Diagnosis (2021-2026) & (Units)
Figure 25. Point-of-Care Molecular Diagnostic Cartridges Consumed in Sexually Transmitted Infection Diagnosis
Figure 26. Global Point-of-Care Molecular Diagnostic Cartridges Market: Sexually Transmitted Infection Diagnosis (2021-2026) & (Units)
Figure 27. Point-of-Care Molecular Diagnostic Cartridges Consumed in Vaginal Infection Diagnosis
Figure 28. Global Point-of-Care Molecular Diagnostic Cartridges Market: Vaginal Infection Diagnosis (2021-2026) & (Units)
Figure 29. Point-of-Care Molecular Diagnostic Cartridges Consumed in Maternal Perinatal Infection Screening
Figure 30. Global Point-of-Care Molecular Diagnostic Cartridges Market: Maternal Perinatal Infection Screening (2021-2026) & (Units)
Figure 31. Point-of-Care Molecular Diagnostic Cartridges Consumed in Blood Borne Viral Infection Diagnosis
Figure 32. Global Point-of-Care Molecular Diagnostic Cartridges Market: Blood Borne Viral Infection Diagnosis (2021-2026) & (Units)
Figure 33. Point-of-Care Molecular Diagnostic Cartridges Consumed in Pharmacogenomic Therapy Guidance
Figure 34. Global Point-of-Care Molecular Diagnostic Cartridges Market: Pharmacogenomic Therapy Guidance (2021-2026) & (Units)
Figure 35. Point-of-Care Molecular Diagnostic Cartridges Consumed in Other
Figure 36. Global Point-of-Care Molecular Diagnostic Cartridges Market: Other (2021-2026) & (Units)
Figure 37. Global Point-of-Care Molecular Diagnostic Cartridges Sale Market Share by Application (2025)
Figure 38. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Application in 2025
Figure 39. Point-of-Care Molecular Diagnostic Cartridges Sales by Company in 2025 (Units)
Figure 40. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Company in 2025
Figure 41. Point-of-Care Molecular Diagnostic Cartridges Revenue by Company in 2025 ($ millions)
Figure 42. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Company in 2025
Figure 43. Global Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Geographic Region (2021-2026)

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Figure 44. Global Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Geographic Region in 2025
Figure 45. Americas Point-of-Care Molecular Diagnostic Cartridges Sales 2021-2026 (Units)
Figure 46. Americas Point-of-Care Molecular Diagnostic Cartridges Revenue 2021-2026 ($ millions)
Figure 47. APAC Point-of-Care Molecular Diagnostic Cartridges Sales 2021-2026 (Units)
Figure 48. APAC Point-of-Care Molecular Diagnostic Cartridges Revenue 2021-2026 ($ millions)
Figure 49. Europe Point-of-Care Molecular Diagnostic Cartridges Sales 2021-2026 (Units)
Figure 50. Europe Point-of-Care Molecular Diagnostic Cartridges Revenue 2021-2026 ($ millions)
Figure 51. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales 2021-2026 (Units)
Figure 52. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Revenue 2021-2026 ($ millions)
Figure 53. Americas Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country in 2025
Figure 54. Americas Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Country (2021-2026)
Figure 55. Americas Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type (2021-2026)
Figure 56. Americas Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Application (2021-2026)
Figure 57. United States Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 58. Canada Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 59. Mexico Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 60. Brazil Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 61. APAC Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Region in 2025
Figure 62. APAC Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Region (2021-2026)
Figure 63. APAC Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by

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Type (2021-2026)
Figure 64. APAC Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Application (2021-2026)
Figure 65. China Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 66. Japan Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 67. South Korea Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 68. Southeast Asia Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 69. India Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 70. Australia Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 71. China Taiwan Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 72. Europe Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country in 2025
Figure 73. Europe Point-of-Care Molecular Diagnostic Cartridges Revenue Market Share by Country (2021-2026)
Figure 74. Europe Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type (2021-2026)
Figure 75. Europe Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Application (2021-2026)
Figure 76. Germany Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 77. France Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 78. UK Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 79. Italy Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 80. Russia Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 81. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Country (2021-2026)
Figure 82. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Type (2021-2026)

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Figure 83. Middle East & Africa Point-of-Care Molecular Diagnostic Cartridges Sales Market Share by Application (2021-2026)
Figure 84. Egypt Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 85. South Africa Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 86. Israel Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 87. Turkey Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 88. GCC Countries Point-of-Care Molecular Diagnostic Cartridges Revenue Growth 2021-2026 ($ millions)
Figure 89. Manufacturing Cost Structure Analysis of Point-of-Care Molecular Diagnostic Cartridges in 2026
Figure 90. Manufacturing Process Analysis of Point-of-Care Molecular Diagnostic Cartridges
Figure 91. Industry Chain Structure of Point-of-Care Molecular Diagnostic Cartridges
Figure 92. Channels of Distribution

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