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ASEAN Point of Care Diagnostics Market by Product (Infectious Disease (TB, Hepatitis, STDs, HAIs), Glucose, Cardiometabolic, Pregnancy, Coagulation), Technology (Lateral Flow Assays, Biochemistry, MDx), End User (Home Care, Hospitals) - Forecast to 2030

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Abstracts

The ASEAN point of care diagnostics market is expected to grow from USD 1.08 billion in 2025 to reach USD 1.36 billion in 2030, at a CAGR of 4.7% during the forecast period. Favorable government policies and funding investments drive the demand for Point of Care (POC) testing in the ASEAN region. Governments in these countries are increasingly supporting adopting such technologies to improve health access, reduce costs, and enhance patient outcomes. Through strategic partnerships, research initiatives, and nationwide screening campaigns, ASEAN governments promote using POC technologies to make healthcare accessible, lower costs, and improve patient outcomes. In several developing nations within the region, where health infrastructure is relatively underdeveloped, authorities encourage using POC devices to decentralize laboratory-based diagnostics and expand access to testing. These supportive initiatives are fostering the growth of POC diagnostics and creating new market opportunities for diagnostic firms in the ASEAN region.

“The infectious disease testing products segment is expected to register the highest growth rate in the ASEAN point of care diagnostics market, by product.”

Based on product, the ASEAN point of care diagnostics market is segmented into infectious disease testing products, glucose monitoring products, cardiometabolic testing products, coagulation monitoring products, pregnancy & fertility testing products,

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urinalysis testing products, cancer marker testing products, cholesterol testing products, hematology testing products, fecal occult testing products, drugs-of-abuse testing products, and other POC products. Among them, the infectious disease testing products segment is expected to grow at the highest CAGR, primarily driven by the region’s continuous efforts towards enhancing disease surveillance and outbreak control. Recurrent outbreaks of infectious diseases, in addition to the requirement for rapid diagnosis in both urban & rural healthcare facilities, are fueling the demand for effective POC solutions. Additionally, the rapid development of advanced molecular platforms and immunoassays will facilitate the effective and smooth identification of infectious diseases, further expanding adoption among ASEAN countries.

“By technology, the Biochemistry segment accounted for the largest market share in the ASEAN point of care diagnostics market in 2024.”

The ASEAN point of care diagnostics market is segmented by technology into lateral flow assays (immunoassays), rapid tests (molecular diagnostics), and biochemistry. In 2024, the Biochemistry segment accounted for the largest share of the market owing to its extensive usability in a variety of routine & essential diagnostic tests such as blood glucose checks, electrolyte analysis, liver function tests, and kidney function tests. The high prevalence of chronic & lifestyle-associated diseases like diabetes, cardiovascular disease, and kidney disorders in the ASEAN countries has also substantially necessitated the need for point-of-care testing solutions based on biochemistry. Moreover, the ease of operation, cost-effectiveness, and shorter turnaround time of biochemistry analyzers make them appropriate for decentralized healthcare environments such as community clinics, primary health centers, and emergency departments. The growing demand for early disease detection & diagnosis has further supported the implementation of biochemistry-based POC solutions in the ASEAN market.

“Vietnam is the fastest-growing market for point of care diagnostics in the ASEAN region”

The ASEAN market for point of care diagnostics is categorized into Vietnam, Laos, Cambodia, Malaysia, Myanmar, Philippines, Singapore, Thailand, Indonesia, and Brunei. Vietnam is expected to grow at the highest CAGR during the forecast period. Vietnam’s strong focus on strengthening its primary healthcare network and expanding nationwide screening programs—especially after the COVID-19 pandemic—has significantly increased the adoption of point-of-care diagnostic solutions in public and private healthcare facilities. Additionally, the country is committed to improving the early detection and management of infectious diseases, bolstered by its robust disease surveillance and monitoring systems, which will support long-term market growth. As reflected in its Joint External Evaluation and Global Health Security Index scores, Vietnam's impressive performance in global health security indicators highlights the healthcare system's growing capacity to implement point-of-care diagnostics in the coming years.

The break-up of the profile of primary participants in the ASEAN point of care diagnostics market:

By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 – 30%

By Designation: C-level - 27%, D-level - 18%, and Others - 55%

The key players in this market are Abbott (US), F. Hoffmann-La Roche Ltd. (Switzerland), Siemens Healthineers AG (Germany), Sysmex Corporation (Japan), Danaher Corporation (US), BD (US), QuidelOrtho Corporation (US), Cardinal Health (US), AccuBioTech Co., Ltd. (China), EKF Diagnostics Holdings plc (UK), bioM?rieux (France), Thermo Fisher Scientific Inc. (US), BIOSYNEX SA (France), PTS Diagnostics (US), LifeScan IP Holdings, LLC (US), SD Biosensor, INC. (South Korea), CTK Biotech, Inc. (US), Wondfo (China), Trinity Biotech (Ireland), SEKISUI Diagnostics (US), Werfen (Spain), ARKRAY, Inc. (US), Xiamen Boson Biotech Co., Ltd. (China), Credo Diagnostics Biomedical Pte. Ltd. (Singapore), Anbio Biotechnology Inc. (Germany), and SG Diagnostics (Singapore).

Research Coverage:

This research report categorizes the ASEAN point of care diagnostics market by product (infectious disease testing products, glucose monitoring products, cardiometabolic testing products, coagulation monitoring products, pregnancy & fertility testing products, urinalysis testing products, cancer marker testing products, cholesterol testing products, hematology testing products, fecal occult testing products, drugs-of-abuse testing products, and other POC products), by technology [lateral flow assays (immunoassays), rapid tests (molecular diagnostics), and biochemistry], by end user (clinical laboratories, hospitals and critical care centers, outpatient settings and ambulatory care centers, home care settings, and other end users) and by country (Vietnam, Laos, Cambodia, Malaysia, Myanmar, Philippines, Singapore, Thailand, Indonesia, and Brunei). The report provides comprehensive information on the key

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factors influencing the growth of the ASEAN point-of-care diagnostics market, including drivers, restraints, opportunities, and challenges. It includes a detailed analysis of the major industry players, offering insights into their business overviews, solutions, key strategies, acquisitions, and agreements. Additionally, the report discusses new product and service launches and recent developments in the point-of-care diagnostics market. A competitive analysis of emerging startups within the ASEAN point-of-care diagnostics ecosystem is also included.

Reasons to buy this report:

The report will help market leaders and new entrants with information on the closest approximations of the revenue numbers for the ASEAN point of care diagnostics market and its subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, opportunities, and challenges.

The report provides insights into the following points:

Analysis of key drivers [Rising incidence of infectious diseases, increasing prevalence of chronic diseases, favorable government initiatives for POC testing, and the rising number of Public-Private Partnerships (PPPs)], opportunities (Gradual shift toward decentralized healthcare systems and availability of POC tests with multiplexing capabilities), restraints (Pricing pressure on manufacturers and stringent regulatory approval process for product commercialization), and challenges (Shortage of skilled healthcare providers and premium pricing of novel platforms) that influence the growth of the ASEAN point of care diagnostics market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the ASEAN point of care diagnostics market.

Market Development: Comprehensive information about lucrative markets—the report analyses the ASEAN point of care diagnostics market across various countries.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the ASEAN point of care diagnostics market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Abbott (US), F. Hoffmann-La Roche Ltd. (Switzerland), Siemens Healthineers AG (Germany), Sysmex Corporation (Japan), and Danaher Corporation (US).

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