

# **In-Vitro Diagnostics/IVD Market by Product and Service (Instrument, Kits), Technology (Immunoassay, MDx, Hematology, Urinalysis), Application (Diabetes, Oncology, Cardiology, Nephrology, Infectious Diseases) End User (Hospitals) - Global Forecast to 2026**

<https://marketpublishers.com/r/I0FB171E236EN.html>

Date: March 2022

Pages: 415

Price: US\$ 4,950.00 (Single User License)

ID: I0FB171E236EN

## **Abstracts**

The global IVD market is projected to reach USD 113.1 billion by 2026 from USD 98.2 billion in 2021, at a CAGR of 2.9% during the forecast period. The growth of the IVD market is mainly driven by the rising geriatric population and the subsequent growth in the prevalence of chronic and infectious diseases, increasing adoption of fully automated and POC instruments in developed regions, growing awareness regarding diseases diagnosis in developing regions, and growing R&D investments by industry players to launch new IVD products. Also, the development of disease-specific markers and tests is expected to offer potential growth opportunities to market players in the coming years. However, the unfavorable reimbursement scenario is expected to restrain the growth of this market during the forecast period.

“Reagents & kits segment accounted for the largest share in the IVD market.”

Based on product and service, the IVD market is segmented into reagents & kits, instruments, services, and data management software. The reagents & kits segment accounted for the largest share of 68.1% of the IVD market in 2020. Accessibility to a wide range of reagents and the need for reliable, specific, and faster detection of chronic diseases and genetic disorders in the early stages are expected to drive the growth of this segment.

“Oncology segment is expected to witness the fastest growth in the forecast period.”

Based on application, the IVD market is segmented into infectious diseases, diabetes, Oncology, cardiology, drug testing/ pharmacogenomics, HIV/AIDS, autoimmune diseases, nephrology and other applications. In 2020, infectious diseases accounted for 34.1% of the IVD market. The large share of this segment can be attributed to the rising prevalence of infectious diseases and multi-drug-resistant infectious diseases and the growing need for effective diagnostic tools for these diseases. However, the oncology segment is projected to grow at the highest CAGR of 6.6% during the forecast period. The increasing number of cancer cases across the globe, the growing demand for personalized medicine, and the availability of funding for cancer research are the major factors driving the market growth.

“Immunoassay/immunochemistry account for the largest share in the IVD market.”

Based on technology, the IVD market is segmented into immunoassay/immunochemistry, clinical chemistry, molecular diagnostics, hematology, microbiology, coagulation and hemostasis, urinalysis and other technologies. The immunoassay/immunochemistry segment accounted for 31% of the IVD technologies market in 2020. The growing preference for these technologies in clinical diagnostics over conventional methods and the ability of immunoassay/immunochemistry technologies to offer faster results with high sensitivity and accuracy are contributing to the growth of this market segment.

“Hospital laboratories accounted for the largest share of IVD market in 2020”

Based on the end user, the IVD market is segmented into hospital laboratories, clinical laboratories, academic institutes, POC (point-of-care) testing centers, patients, and other end users. In 2020, hospital laboratories accounted for the largest share of 47% of the IVD market, followed by clinical laboratories (23.8%) and POC testing centers (13%). Many diagnostic tests are carried out in hospitals. The acquisition of smaller physician practices and groups by hospitals is becoming a noticeable trend in the US healthcare industry; the continuation of this trend will support the IVD market for hospital laboratories.

“North America accounted for the largest share of the IVD market in 2020”

The IVD market is divided into five major regions—North America, Europe, Asia Pacific,

Latin America, and the Middle East & Africa. In 2020, North America accounted for the largest share of 39.8% of the IVD market, followed by Europe (28%), Asia Pacific (22.9%), Latin America (6.5%), and the Middle East & Africa (2.9%). The IVD market in North America is well established, with the US being the major market in this region. Growth in the North American market is mainly driven by the increasing per capita healthcare expenditure and technologically advanced healthcare infrastructure in the region. Initiatives taken by different government associations are also anticipated to boost market growth in the coming years.

A breakdown of the primary participants (supply-side) for the in vitro diagnostics market referred to for this report is provided below:

By Company Type: Tier 1–34%, Tier 2–46%, and Tier 3–20%

By Designation: C-level–35%, Director Level–25%, and Others–40%

By Region: North America–30%, Europe–45%, Asia Pacific–20%, Latin America–3%, and Middle East and Africa– 2%

Roche Diagnostics (Switzerland), Siemens Healthineers (Germany), Danaher Corporation (US), Abbott (US), and Thermo Fisher Scientific (US) are the leading players in this market. Other players in this market are Johnson & Johnson (US), Becton, Dickinson and Company (US), Bio-Rad Laboratories (US), Sysmex Corporation (Japan), bioMérieux (France), DiaSorin (Italy), Ortho Clinical Diagnostics (US), and QIAGEN N.V. (Netherlands).

Research Coverage:

The market study covers the in vitro diagnostics market across various segments. It aims at estimating the market size and the growth potential of this market across different segments by product and service, by technology, by application, by end user, and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market and provide information

regarding the closest approximations of the in vitro diagnostics market and its segments. This report will help stakeholders understand the competitive landscape, gain insights to position their businesses better, and plan suitable go-to-market strategies. The report will also help stakeholders in understanding the pulse of the market and gaining information on key market drivers, restraints, opportunities, and challenges.

## Contents

### 1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS AND EXCLUSIONS

1.3 MARKET SCOPE

FIGURE 1 IN VITRO DIAGNOSTICS MARKET SEGMENTATION

FIGURE 2 IN VITRO DIAGNOSTICS MARKET, BY GEOGRAPHY

1.4 YEARS CONSIDERED FOR THE STUDY

1.5 CURRENCY

TABLE 1 EXCHANGE RATES UTILIZED FOR THE CONVERSION TO USD

1.6 LIMITATIONS

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

2.1 RESEARCH APPROACH

FIGURE 3 RESEARCH DESIGN

2.1.1 SECONDARY RESEARCH

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY RESEARCH

2.1.3 PRIMARY SOURCES

FIGURE 4 KEY DATA FROM PRIMARY SOURCES

FIGURE 5 KEY INDUSTRY INSIGHTS

FIGURE 6 BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE AND DEMAND-SIDE PARTICIPANTS

FIGURE 7 BREAKDOWN OF PRIMARY INTERVIEWS (SUPPLY-SIDE): BY COMPANY TYPE, DESIGNATION, AND REGION

FIGURE 8 BREAKDOWN OF PRIMARY INTERVIEWS (DEMAND-SIDE): BY END USER, DESIGNATION, AND REGION

2.2 MARKET SIZE ESTIMATION

FIGURE 10 REVENUE SHARE ANALYSIS ILLUSTRATION: ROCHE DIAGNOSTICS (2020)

FIGURE 11 SUPPLY-SIDE ANALYSIS: IN VITRO DIAGNOSTICS MARKET (2020)

FIGURE 13 CAGR PROJECTIONS FROM THE ANALYSIS OF MARKET DRIVERS, RESTRAINTS, OPPORTUNITIES & CHALLENGES OF THE IVD INDUSTRY

(2021-2026)

FIGURE 14 CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS OF THE IN VITRO DIAGNOSTICS MARKET

2.3 DATA TRIANGULATION APPROACH

2.4 MARKET SHARE ESTIMATION

2.5 ASSUMPTIONS FOR THE STUDY

2.6 LIMITATIONS

2.6.1 METHODOLOGY-RELATED LIMITATIONS

2.6.2 SCOPE-RELATED LIMITATIONS

2.7 RISK ASSESSMENT

TABLE 2 RISK ASSESSMENT: IN VITRO DIAGNOSTICS MARKET

### **3 EXECUTIVE SUMMARY**

### **4 PREMIUM INSIGHTS**

4.1 IN VITRO DIAGNOSTICS MARKET OVERVIEW

4.2 ASIA PACIFIC: IN VITRO DIAGNOSTICS MARKET, BY PRODUCT & SERVICE AND COUNTRY (2020)

4.3 IN VITRO DIAGNOSTICS MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES

4.4 GEOGRAPHIC MIX: IN VITRO DIAGNOSTICS MARKET

4.5 IN VITRO DIAGNOSTICS MARKET: DEVELOPED VS. DEVELOPING MARKETS

### **5 MARKET OVERVIEW**

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 25 IN VITRO DIAGNOSTICS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Rising geriatric population and subsequent growth in the prevalence of chronic and infectious diseases

TABLE 3 ESTIMATED INCREASE IN THE GERIATRIC POPULATION, BY REGION (2019–2050)

FIGURE 26 CHINA: NUMBER OF PEOPLE WITH DIABETES MELLITUS, 2000–2045 (IN MILLIONS)

5.2.1.2 Shift from centralized to point-of-care testing

5.2.1.3 Growing awareness and initiatives to increase healthcare accessibility in

developing countries

5.2.1.4 Changing technological landscape

TABLE 4 IN VITRO DIAGNOSTICS MARKET: RECENT PRODUCT LAUNCHES

5.2.2 RESTRAINTS

5.2.2.1 Unfavorable reimbursement scenario

5.2.3 OPPORTUNITIES

5.2.3.1 Development of disease-specific biomarkers and tests

TABLE 5 CANCER BIOMARKERS AND USES IN CLINICAL PRACTICE

5.2.3.2 Growing significance of companion diagnostics

5.2.3.3 Growth opportunities in emerging countries

FIGURE 27 ANNUAL PER CAPITA HEALTH EXPENDITURE IN DEVELOPING COUNTRIES, 2019 (USD MILLION)

5.2.4 CHALLENGES

5.2.4.1 Changing regulatory landscape in the EU

FIGURE 28 IVDR: KEY AREAS OF IMPACT

5.2.4.2 Operational barriers faced in conducting diagnostic tests

## **6 INDUSTRY INSIGHTS**

### **6.1 INDUSTRY TRENDS**

6.1.1 AUTOMATION OF CLINICAL LABORATORY TECHNIQUES

6.1.2 MICROFLUIDICS-BASED POC AND LAB-ON-A-CHIP DIAGNOSTIC DEVICES FOR LABORATORY TESTING

6.1.3 GROWING NUMBER OF REAGENT RENTAL AGREEMENTS

### **6.2 PORTER'S FIVE FORCES ANALYSIS**

TABLE 6 PORTER'S FIVE FORCES ANALYSIS: IN VITRO DIAGNOSTICS MARKET

6.2.1 INTENSITY OF COMPETITIVE RIVALRY

6.2.2 BARGAINING POWER OF SUPPLIERS

6.2.3 BARGAINING POWER OF BUYERS

6.2.4 THREAT OF NEW ENTRANTS

6.2.5 THREAT FROM SUBSTITUTES

### **6.3 REGULATORY ANALYSIS**

6.3.1 US

TABLE 7 US: CLASSIFICATION OF IN VITRO DIAGNOSTIC DEVICES

FIGURE 29 US: REGULATORY PROCESS FOR IVD DEVICES

6.3.2 CANADA

FIGURE 30 CANADA: REGULATORY PROCESS FOR IVD DEVICES IN CANADA

6.3.3 EUROPE

TABLE 8 EUROPE: CLASSIFICATION OF IVD DEVICES

**FIGURE 31 EUROPE: IVDR TIMELINE****6.3.4 JAPAN****FIGURE 32 REGULATORY PROCESS FOR IVD DEVICES IN JAPAN****TABLE 9 JAPAN: CLASSIFICATION OF IVD REAGENTS****TABLE 10 JAPAN: TIME, COST, AND COMPLEXITY OF REGISTRATION PROCESS****6.3.5 CHINA****TABLE 11 CHINA: TIME, COST, AND COMPLEXITY OF REGISTRATION PROCESS****6.3.6 INDIA****FIGURE 33 INDIA: REGULATORY PROCESS FOR IVD DEVICES****6.3.7 INDONESIA****TABLE 12 INDONESIA: REGISTRATION PROCESS FOR IVD DEVICES****6.3.8 RUSSIA****TABLE 13 RUSSIA: CLASSIFICATION OF IVD DEVICES****6.3.9 SAUDI ARABIA****TABLE 14 SAUDI ARABIA: TIME, COST, AND COMPLEXITY OF REGISTRATION PROCESS****6.3.10 MEXICO****FIGURE 34 MEXICO: REGULATORY PROCESS FOR IVD DEVICES****TABLE 15 MEXICO: TIME, COST, AND COMPLEXITY OF REGISTRATION PROCESS****6.3.11 BRAZIL****FIGURE 35 BRAZIL: REGULATORY PROCESS FOR IVD DEVICES****6.3.12 SOUTH KOREA****TABLE 16 SOUTH KOREA: TIME, COST, AND COMPLEXITY OF REGISTRATION PROCESS****6.4 PATENT ANALYSIS****FIGURE 36 TOP PATENT OWNERS AND APPLICANTS: IN VITRO DIAGNOSTICS MARKET (JANUARY 2011–DECEMBER 2021)****FIGURE 37 PATENT ANALYSIS: IN VITRO DIAGNOSTICS MARKET (JANUARY 2011–DECEMBER 2021)****6.5 TRADE ANALYSIS****6.5.1 TRADE ANALYSIS FOR DIAGNOSTICS AND LABORATORY REAGENTS****TABLE 17 IMPORT DATA FOR DIAGNOSTIC AND LABORATORY REAGENTS, BY COUNTRY 2016–2020 (USD MILLION)****TABLE 18 IMPORT DATA FOR DIAGNOSTIC AND LABORATORY REAGENTS, BY COUNTRY 2016–2020 (TONS)****6.6 ECOSYSTEM ANALYSIS****FIGURE 38 ECOSYSTEM ANALYSIS: IN VITRO DIAGNOSTICS MARKET****6.7 VALUE CHAIN ANALYSIS**



FIGURE 39 VALUE CHAIN ANALYSIS: IN VITRO DIAGNOSTICS MARKET

6.8 SUPPLY CHAIN ANALYSIS

FIGURE 40 SUPPLY CHAIN ANALYSIS: IN VITRO DIAGNOSTICS MARKET

6.9 COVID-19 IMPACT ANALYSIS

6.9.1 COVID-19 HEALTH ASSESSMENT

6.9.2 COVID-19 ECONOMIC ASSESSMENT

6.9.3 ASSESSMENT OF THE IMPACT OF COVID-19 ON THE ECONOMIC SCENARIO

FIGURE 41 CRITERIA IMPACTING THE GLOBAL ECONOMY

6.9.4 ASSESSMENT OF THE IMPACT OF COVID-19 ON THE ECONOMIC SCENARIO IN THE IN VITRO DIAGNOSTICS MARKET

FIGURE 42 COVID-19 IMPACT ON GLOBAL IN VITRO DIAGNOSTICS MARKET

FIGURE 43 ROCHE DIAGNOSTICS: IMPACT OF COVID-19

FIGURE 44 ABBOTT LABORATORIES, INC.: IMPACT OF COVID-19

6.10 PRICING ANALYSIS

TABLE 19 AVERAGE SELLING PRICE (USD): IMMUNOASSAY ANALYZERS

TABLE 20 AVERAGE SELLING PRICE (USD): LATERAL FLOW ANALYZERS

TABLE 21 AVERAGE SELLING PRICE (USD): MOLECULAR DIAGNOSTICS

6.11 TECHNOLOGY ANALYSIS

6.11.1 KEY TECHNOLOGIES: IN VITRO DIAGNOSTICS MARKET

6.11.2 ADJACENT TECHNOLOGIES: IN VITRO DIAGNOSTICS MARKET

6.12 ADJACENT MARKET ANALYSIS

FIGURE 45 MICROFLUIDICS MARKET: MARKET OVERVIEW

6.13 CASE STUDY

FIGURE 46 CASE STUDY: MARKET ASSESSMENT AND CONSUMER BUYING BEHAVIOUR IN INDIA

## **7 IN VITRO DIAGNOSTICS MARKET, BY PRODUCT & SERVICE**

7.1 INTRODUCTION

TABLE 22 IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

7.2 REAGENTS & KITS

7.2.1 TECHNOLOGICAL ADVANCES LIKE RAPID DIAGNOSTICS ARE EXPECTED TO BOOST THE GROWTH OF THIS SEGMENT

TABLE 23 IVD REAGENTS & KITS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 24 IVD REAGENTS & KITS MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

7.3 INSTRUMENTS

TABLE 25 IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 26 IVD INSTRUMENTS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 27 IVD INSTRUMENTS MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

#### 7.3.1 FULLY AUTOMATED INSTRUMENTS

7.3.1.1 Rising incidence of various diseases and the increasing need to process heavy sample load to drive the market growth

TABLE 28 FULLY AUTOMATED IVD INSTRUMENTS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 7.3.2 SEMI-AUTOMATED INSTRUMENTS

7.3.2.1 Compact design and cost-effectiveness over automated analyzers are expected to increase the market growth of this segment

TABLE 29 SEMI-AUTOMATED IVD INSTRUMENTS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 7.3.3 OTHER INSTRUMENTS

TABLE 30 OTHER IVD INSTRUMENTS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

### 7.4 DATA MANAGEMENT SOFTWARE

#### 7.4.1 NEED FOR LABORATORY AUTOMATION DRIVES MARKET GROWTH

TABLE 31 KEY DATA MANAGEMENT SOFTWARE SOLUTIONS AVAILABLE IN THE MARKET

TABLE 32 IVD DATA MANAGEMENT SOFTWARE MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 33 IVD DATA MANAGEMENT SOFTWARE MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

### 7.5 SERVICES

7.5.1 GROWING COMPETITIVENESS AND THE INCREASING NEED TO OFFER VALUE-ADDED SERVICES TO BOOST THE MARKET GROWTH

TABLE 34 IVD SERVICES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 35 IVD SERVICES MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

## 8 IN VITRO DIAGNOSTICS MARKET, BY TECHNOLOGY

### 8.1 INTRODUCTION

TABLE 36 IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

### 8.2 IMMUNOASSAY/IMMUNOCHEMISTRY

TABLE 37 IMMUNOASSAY/IMMUNOCHEMISTRY ANALYZERS AVAILABLE IN THE MARKET

TABLE 38 IVD MARKET FOR IMMUNOASSAY/IMMUNOCHEMISTRY, BY COUNTRY,

2019–2026 (USD MILLION)

TABLE 39 IVD MARKET FOR IMMUNOASSAY/IMMUNOCHEMISTRY, BY TYPE, 2019–2026 (USD MILLION)

#### 8.2.1 ENZYME-LINKED IMMUNOSORBENT ASSAYS

TABLE 40 ELISA ANALYZERS AVAILABLE IN THE MARKET

TABLE 41 ELISA MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 42 ELISA MARKET, BY TYPE, 2019–2026 (USD MILLION)

##### 8.2.1.1 Chemiluminescence immunoassays

8.2.1.1.1 CLIAs hold the largest share of the ELISA market

TABLE 43 CHEMILUMINESCENCE IMMUNOASSAY SYSTEMS AVAILABLE IN THE MARKET

TABLE 44 CHEMILUMINESCENCE IMMUNOASSAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.2.1.2 Fluorescence immunoassays

8.2.1.2.1 Rapid processing, high sensitivity, and low cost have driven the adoption of FIAs

TABLE 45 FLUORESCENCE IMMUNOASSAY SYSTEMS AVAILABLE IN THE MARKET

TABLE 46 FLUORESCENCE IMMUNOASSAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.2.1.3 Colorimetric immunoassays

8.2.1.3.1 Despite widespread use, demand for colorimetric immunoassays has declined due to low sensitivity

TABLE 47 COLORIMETRIC IMMUNOASSAY SYSTEMS AVAILABLE IN THE MARKET

TABLE 48 COLORIMETRIC IMMUNOASSAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.2.2 RADIOIMMUNOASSAYS

8.2.2.1 Small sample volumes, rapid processing times offset by high cost and potential health hazards

TABLE 49 RADIOIMMUNOASSAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.2.3 RAPID TESTS

8.2.3.1 COVID-19 pandemic drove demand for rapid tests

TABLE 50 RAPID TESTS AVAILABLE IN THE MARKET

TABLE 51 RAPID TESTS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.2.4 WESTERN BLOTTING

8.2.4.1 Western blotting is the gold standard for result validation

TABLE 52 WESTERN BLOTTING SYSTEMS AVAILABLE IN THE MARKET

TABLE 53 WESTERN BLOTTING MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.2.5 ENZYME-LINKED IMMUNOSPOT ASSAYS

8.2.5.1 High sensitivity, functionality, and adaptability support the growth of ELISPOT  
TABLE 54 ELISPOT ASSAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

### 8.3 CLINICAL CHEMISTRY

TABLE 55 CLINICAL CHEMISTRY ANALYZERS FOR HIGH AND MID-VOLUME LABORATORIES

TABLE 56 CLINICAL CHEMISTRY ANALYZERS FOR LOW-VOLUME LABORATORIES

TABLE 57 BLOOD GAS ANALYZERS AVAILABLE IN THE MARKET

TABLE 58 IVD MARKET FOR CLINICAL CHEMISTRY, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 59 CLINICAL CHEMISTRY MARKET, BY TYPE, 2019–2026 (USD MILLION)

#### 8.3.1 BASIC METABOLIC PANELS

8.3.1.1 Basic metabolic panels hold the largest share of the clinical chemistry market  
TABLE 60 BASIC METABOLIC PANELS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.2 LIVER PANELS

8.3.2.1 Growing liver disease burden and alcohol consumption driving market growth  
TABLE 61 LIVER PANELS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.3 RENAL PROFILES

8.3.3.1 Rising kidney disease prevalence ensures demand for renal profiles  
TABLE 62 RENAL PROFILES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.4 LIPID PROFILES

8.3.4.1 Growth in CVD caseload supports the adoption of lipid panels  
TABLE 63 LIPID PROFILES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.5 THYROID FUNCTION PANELS

8.3.5.1 Rising awareness and incidence of thyroid diseases drive the market  
TABLE 64 THYROID FUNCTION PANELS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.6 ELECTROLYTE PANELS

8.3.6.1 Focus on preventive healthcare to favor the market for electrolyte panels  
TABLE 65 ELECTROLYTE PANELS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.3.7 SPECIALTY CHEMICAL TESTS

8.3.7.1 Includes tests not prescribed regularly, such as protein tests, drugs-of-abuse tests, and therapeutic drug monitoring

TABLE 66 SPECIALTY CHEMICAL TESTS MARKET, BY COUNTRY, 2019–2026

(USD MILLION)

#### 8.4 MOLECULAR DIAGNOSTICS

TABLE 67 AUTOMATED MOLECULAR DIAGNOSTIC PLATFORMS AVAILABLE IN THE MARKET

TABLE 68 IVD MARKET FOR MOLECULAR DIAGNOSTICS, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 69 MOLECULAR DIAGNOSTICS MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

##### 8.4.1 POLYMERASE CHAIN REACTION

8.4.1.1 PCR dominates the molecular diagnostics market

TABLE 70 PCR INSTRUMENTS AVAILABLE IN THE MARKET

TABLE 71 PCR MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.4.2 ISOTHERMAL NUCLEIC ACID AMPLIFICATION TECHNOLOGY

8.4.2.1 Growing popularity of INAAT and NAAT for infectious disease diagnostics to support market growth

TABLE 72 INAAT MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.4.3 HYBRIDIZATION

8.4.3.1 Advanced in hybridization and automation have driven the adoption of hybridization technologies

TABLE 73 HYBRIDIZATION MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.4.4 DNA SEQUENCING & NEXT-GENERATION SEQUENCING

8.4.4.1 Growing use in personalized medicine and declining costs

TABLE 74 NGS INSTRUMENTS AVAILABLE IN THE MARKET

TABLE 75 DNA SEQUENCING & NGS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.4.5 MICROARRAYS

8.4.5.1 Advantages of microarrays—high throughput, resolution, and sensitivity—drive their adoption

TABLE 76 MICROARRAYS MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

##### 8.4.6 OTHER MDX TECHNOLOGIES

TABLE 77 OTHER MOLECULAR DIAGNOSTIC TECHNOLOGIES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.5 HEMATOLOGY

8.5.1 INCREASING ADOPTION OF AUTOMATED HEMATOLOGY ANALYZERS IS EXPECTED TO DRIVE THE MARKET GROWTH

TABLE 78 HEMATOLOGY ANALYZERS AVAILABLE IN THE MARKET

TABLE 79 IVD MARKET FOR HEMATOLOGY, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.6 MICROBIOLOGY

#### 8.6.1 RISING PREVALENCE OF INFECTIOUS DISEASES WILL BOOST THE GROWTH OF THIS SEGMENT

TABLE 80 MICROBIOLOGY INSTRUMENTS AVAILABLE IN THE MARKET

TABLE 81 IVD MARKET FOR MICROBIOLOGY, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.7 COAGULATION & HEMOSTASIS

8.7.1 INCREASING NUMBER OF SURGERIES AND GROWING USE OF ANTICOAGULATION THERAPY WILL DRIVE THE MARKET GROWTH FOR THIS SEGMENT

TABLE 82 COAGULATION ANALYZERS AVAILABLE IN THE MARKET

TABLE 83 POINT-OF-CARE/SELF-MONITORING COAGULATION ANALYZERS AVAILABLE IN THE MARKET

TABLE 84 IVD MARKET FOR COAGULATION & HEMOSTASIS, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.8 URINALYSIS

8.8.1 RISING PREVALENCE OF DIABETES AND KIDNEY DISORDERS WILL HAVE A POSITIVE IMPACT ON THE GROWTH OF THIS SEGMENT

TABLE 85 URINALYSIS INSTRUMENTS AVAILABLE IN THE MARKET

TABLE 86 IVD MARKET FOR URINALYSIS, BY COUNTRY, 2019–2026 (USD MILLION)

#### 8.9 OTHER TECHNOLOGIES

TABLE 87 BLOOD GLUCOSE TESTING SYSTEMS AVAILABLE IN THE MARKET

TABLE 88 TISSUE PROCESSORS, EMBEDDERS, MICROTOMES, AND STAINERS AVAILABLE IN THE MARKET

TABLE 89 IVD MARKET FOR OTHER TECHNOLOGIES, BY COUNTRY, 2019–2026 (USD MILLION)

### **9 IN VITRO DIAGNOSTICS MARKET, BY APPLICATION**

#### 9.1 INTRODUCTION

TABLE 90 IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

#### 9.2 INFECTIOUS DISEASES

9.2.1 INFECTIOUS DISEASES ACCOUNTED FOR THE LARGEST MARKET SHARE IN 2020

TABLE 91 IVD MARKET FOR INFECTIOUS DISEASES, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.3 DIABETES

9.3.1 DIABETES PATIENTS REQUIRE CONSTANT MONITORING

TABLE 92 GLOBAL DIABETIC PATIENT POPULATION, 2019 VS. 2030 (MILLION)

TABLE 93 IVD MARKET FOR DIABETES, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.4 ONCOLOGY

9.4.1 ADVANCEMENTS IN MOLECULAR DIAGNOSTICS WILL AID THE EARLY DIAGNOSIS OF CANCER

TABLE 94 IVD MARKET FOR ONCOLOGY, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.5 CARDIOLOGY

9.5.1 INCREASING DISEASE BURDEN OF CVD TO DRIVE THE MARKET GROWTH

TABLE 95 IVD MARKET FOR CARDIOLOGY, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.6 DRUG TESTING/PHARMACOGENOMICS

9.6.1 INCREASING CONSUMPTION OF ILLICIT DRUGS WILL LEAD TO AN INCREASE IN TOXICOLOGY TESTING

TABLE 96 IVD MARKET FOR DRUG TESTING/PHARMACOGENOMICS, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.7 HIV/AIDS

9.7.1 HIGH PREVALENCE OF AIDS IS EXPECTED TO BOOST THE MARKET GROWTH

TABLE 97 IVD MARKET FOR HIV/AIDS, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.8 AUTOIMMUNE DISEASES

9.8.1 DEVELOPMENT OF NOVEL DISEASE-SPECIFIC BIOMARKERS WILL HAVE A POSITIVE IMPACT ON THE MARKET GROWTH

TABLE 98 IVD MARKET FOR AUTOIMMUNE DISEASES, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.9 NEPHROLOGY

9.9.1 INCREASING PREVALENCE OF CHRONIC KIDNEY DISEASES IS EXPECTED TO DRIVE THE MARKET GROWTH FOR THIS SEGMENT

TABLE 99 IVD MARKET FOR NEPHROLOGY, BY COUNTRY, 2019–2026 (USD MILLION)

#### 9.10 OTHER APPLICATIONS

9.10.1 INCREASING DEMAND FOR SELF-MONITORING KITS IS LIKELY TO HAVE A POSITIVE IMPACT ON THE MARKET GROWTH

TABLE 100 IVD MARKET FOR OTHER APPLICATIONS, BY COUNTRY, 2019–2026 (USD MILLION)

## **10 IN VITRO DIAGNOSTICS MARKET, BY END USER**

### 10.1 INTRODUCTION

TABLE 101 IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

## 10.2 HOSPITAL LABORATORIES

10.2.1 GROWING PATIENT POPULATION AND REIMBURSEMENT POLICIES FOR DIAGNOSTIC TESTS WILL DRIVE THE MARKET GROWTH

TABLE 102 IVD MARKET FOR HOSPITAL LABORATORIES, BY COUNTRY, 2019–2026 (USD MILLION)

## 10.3 CLINICAL LABORATORIES

TABLE 103 IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

TABLE 104 IVD MARKET FOR CLINICAL LABORATORIES, BY COUNTRY

### **2019–2026 (USD MILLION)**

#### 10.3.1 LARGE/REFERENCE LABORATORIES

10.3.1.1 Rising infectious disease burden and demand for larger testing capacities will drive the growth of this segment

TABLE 105 LARGE/REFERENCE LABORATORIES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 10.3.2 MEDIUM-SIZED LABORATORIES

10.3.2.1 Increasing use of automated instruments to drive market growth

TABLE 106 MEDIUM-SIZED LABORATORIES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

#### 10.3.3 SMALL LABORATORIES

10.3.3.1 Increasing adoption of semi-automated instruments and low-end point-of-care devices will boost segment growth

TABLE 107 SMALL LABORATORIES MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

## 10.4 POINT-OF-CARE TESTING CENTERS

10.4.1 GROWING USE OF POC DEVICES IN HOSPITALS AND CLINICAL LABORATORIES IS EXPECTED TO PROPEL THE GROWTH OF THIS SEGMENT

TABLE 108 IVD MARKET FOR POINT-OF-CARE TESTING CENTERS, BY COUNTRY, 2019–2026 (USD MILLION)

## 10.5 PATIENTS

10.5.1 INCREASING ADOPTION OF PATIENT SELF-TESTING KITS TO DRIVE THE MARKET GROWTH

TABLE 109 IVD MARKET FOR PATIENTS, BY COUNTRY, 2019–2026 (USD MILLION)

## 10.6 ACADEMIC INSTITUTES

10.6.1 INCREASING INDUSTRY-ACADEMIA COLLABORATIONS FOR PRODUCT



**DEVELOPMENT SUPPORTS MARKET GROWTH****TABLE 110 IVD MARKET FOR ACADEMIC INSTITUTES, BY COUNTRY, 2019–2026  
(USD MILLION)****10.7 OTHER END USERS****TABLE 111 IVD MARKET FOR OTHER END USERS, BY COUNTRY, 2019–2026  
(USD MILLION)****11 IN VITRO DIAGNOSTICS MARKET, BY REGION****11.1 INTRODUCTION****TABLE 112 IVD MARKET, BY REGION, 2019–2026 (USD MILLION)****11.2 NORTH AMERICA****FIGURE 47 NORTH AMERICA: IVD MARKET SNAPSHOT****TABLE 113 NORTH AMERICA: IVD MARKET, BY COUNTRY, 2019–2026 (USD  
MILLION)****TABLE 114 NORTH AMERICA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026  
(USD MILLION)****TABLE 115 NORTH AMERICA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026  
(USD MILLION)****TABLE 116 NORTH AMERICA: IVD MARKET, BY APPLICATION, 2019–2026 (USD  
MILLION)****TABLE 117 NORTH AMERICA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD  
MILLION)****TABLE 118 NORTH AMERICA: IVD MARKET, BY END USER, 2019–2026 (USD  
MILLION)****TABLE 119 NORTH AMERICA: IVD MARKET FOR CLINICAL LABORATORIES, BY  
TYPE, 2019–2026 (USD MILLION)****11.2.1 US****11.2.1.1 The US dominates the North American Market****TABLE 120 US: MACROECONOMIC INDICATORS****TABLE 121 US: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD  
MILLION)****TABLE 122 US: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)****TABLE 123 US: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)****TABLE 124 US: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)****TABLE 125 US: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)****TABLE 126 US: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026  
(USD MILLION)****11.2.2 CANADA**

11.2.2.1 Increasing prevalence of chronic illness and implementation of favorable government initiatives drive the market in Canada

TABLE 127 CANADA: ESTIMATED PREVALENCE OF DIABETES

TABLE 128 CANADA: MACROECONOMIC INDICATORS

TABLE 129 CANADA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 130 CANADA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 131 CANADA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 132 CANADA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 133 CANADA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 134 CANADA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

### 11.3 EUROPE

TABLE 135 EUROPE: IVD MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 136 EUROPE: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 137 EUROPE: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 138 EUROPE: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 139 EUROPE: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 140 EUROPE: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 141 EUROPE: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.3.1 GERMANY

11.3.1.1 Increasing healthcare expenditure to drive the market growth in Germany

TABLE 142 GERMANY: MACROECONOMIC INDICATORS

TABLE 143 GERMANY: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 144 GERMANY: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 145 GERMANY: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 146 GERMANY: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 147 GERMANY: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 148 GERMANY: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.3.2 FRANCE

11.3.2.1 Rising R&D Expenditure in France to drive market growth

TABLE 149 FRANCE: MACROECONOMIC INDICATORS

TABLE 150 FRANCE: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 151 FRANCE: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 152 FRANCE: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 153 FRANCE: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 154 FRANCE: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 155 FRANCE: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

### 11.3.3 UK

11.3.3.1 The increasing number of accredited diagnostic laboratories propels market growth for in vitro diagnostics in the UK

TABLE 156 UK: MACROECONOMIC INDICATORS

TABLE 157 UK: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 158 UK: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 159 UK: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 160 UK: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 161 UK: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 162 UK: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

### 11.3.4 ITALY

11.3.4.1 Adoption of advanced diagnostic technologies to drive market growth in Italy

TABLE 163 ITALY: MACROECONOMIC INDICATORS

TABLE 164 ITALY: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 165 ITALY: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 166 ITALY: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 167 ITALY: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 168 ITALY: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 169 ITALY: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

### 11.3.5 SPAIN

11.3.5.1 Growth of the geriatric population and rising demand for testing support the market in Spain

TABLE 170 SPAIN: MACROECONOMIC INDICATORS

TABLE 171 SPAIN: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD

MILLION)

TABLE 172 SPAIN: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 173 SPAIN: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 174 SPAIN: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 175 SPAIN: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 176 SPAIN: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.3.6 RUSSIA

11.3.6.1 Increasing access to quality healthcare will support market growth in Russia

TABLE 177 RUSSIA: MACROECONOMIC INDICATORS

TABLE 178 RUSSIA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 179 RUSSIA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 180 RUSSIA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 181 RUSSIA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 182 RUSSIA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 183 RUSSIA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.3.7 REST OF EUROPE

TABLE 184 ROE: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 185 ROE: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 186 ROE: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 187 ROE: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 188 ROE: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 189 ROE: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4 ASIA PACIFIC

FIGURE 48 ASIA PACIFIC: IVD MARKET SNAPSHOT

TABLE 190 ASIA PACIFIC: IVD MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 191 ASIA PACIFIC: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 192 ASIA PACIFIC: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 193 ASIA PACIFIC: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 194 ASIA PACIFIC: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 195 ASIA PACIFIC: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 196 ASIA PACIFIC: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.1 JAPAN

11.4.1.1 Universal healthcare reimbursement policy to drive market growth in Japan

TABLE 197 JAPAN: MACROECONOMIC INDICATORS

TABLE 198 JAPAN: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 199 JAPAN: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 200 JAPAN: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 201 JAPAN: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 202 JAPAN: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 203 JAPAN: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.2 CHINA

11.4.2.1 Growing public access to modern healthcare and the outbreak of COVID-19 to drive market growth

TABLE 204 CHINA: MACROECONOMIC INDICATORS

TABLE 205 CHINA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 206 CHINA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 207 CHINA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 208 CHINA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 209 CHINA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 210 CHINA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.3 INDIA

11.4.3.1 Increasing private & public investments in the country's healthcare system will drive market growth

TABLE 211 INDIA: MACROECONOMIC INDICATORS

TABLE 212 INDIA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 213 INDIA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 214 INDIA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 215 INDIA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 216 INDIA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 217 INDIA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.4 SOUTH KOREA

11.4.4.1 Increased geriatric population coupled with a parallel increase in chronic illnesses to drive the market growth

TABLE 218 SOUTH KOREA: MACROECONOMIC INDICATORS

TABLE 219 SOUTH KOREA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 220 SOUTH KOREA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 221 SOUTH KOREA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 222 SOUTH KOREA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 223 SOUTH KOREA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 224 SOUTH KOREA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.5 INDONESIA

11.4.5.1 Increasing insurance penetration and rising burden of infectious diseases to drive market growth

TABLE 225 INDONESIA: MACROECONOMIC INDICATORS

TABLE 226 INDONESIA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 227 INDONESIA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 228 INDONESIA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 229 INDONESIA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 230 INDONESIA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 231 INDONESIA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.4.6 REST OF ASIA PACIFIC

TABLE 232 ROAPAC: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 233 ROAPAC: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 234 ROAPAC: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 235 ROAPAC: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 236 ROAPAC: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 237 ROAPAC: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.5 LATIN AMERICA

TABLE 238 LATIN AMERICA: IVD MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 239 LATIN AMERICA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 240 LATIN AMERICA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 241 LATIN AMERICA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 242 LATIN AMERICA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 243 LATIN AMERICA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 244 LATIN AMERICA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

##### 11.5.1 BRAZIL

11.5.1.1 Improving healthcare infrastructure in Brazil to drive the growth of the IVD market

TABLE 245 BRAZIL: MACROECONOMIC INDICATORS

TABLE 246 BRAZIL: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 247 BRAZIL: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 248 BRAZIL: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 249 BRAZIL: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 250 BRAZIL: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 251 BRAZIL: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

##### 11.5.2 MEXICO

11.5.2.1 Improving accessibility and affordability of healthcare services to drive market growth for in vitro diagnostics

TABLE 252 MEXICO: MACROECONOMIC INDICATORS

TABLE 253 MEXICO: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 254 MEXICO: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 255 MEXICO: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 256 MEXICO: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 257 MEXICO: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 258 MEXICO: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.5.3 REST OF LATIN AMERICA

TABLE 259 ROLA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 260 ROLA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 261 ROLA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 262 ROLA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 263 ROLA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 264 ROLA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.6 MIDDLE EAST & AFRICA

TABLE 265 MIDDLE EAST & AFRICA: IVD MARKET, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 266 MIDDLE EAST & AFRICA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 267 MIDDLE EAST & AFRICA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 268 MIDDLE EAST & AFRICA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 269 MIDDLE EAST & AFRICA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 270 MIDDLE EAST & AFRICA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 271 MIDDLE EAST & AFRICA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

##### 11.6.1 SAUDI ARABIA

11.6.1.1 High incidence of lifestyle diseases coupled with increasing healthcare budget is to drive market growth

TABLE 272 SAUDI ARABIA: MACROECONOMIC INDICATORS

TABLE 273 SAUDI ARABIA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026



(USD MILLION)

TABLE 274 SAUDI ARABIA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026

(USD MILLION)

TABLE 275 SAUDI ARABIA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 276 SAUDI ARABIA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 277 SAUDI ARABIA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 278 SAUDI ARABIA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

#### 11.6.2 REST OF MIDDLE EAST & AFRICA

TABLE 279 ROMEA: IVD MARKET, BY PRODUCT & SERVICE, 2019–2026 (USD MILLION)

TABLE 280 ROMEA: IVD INSTRUMENTS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 281 ROMEA: IVD MARKET, BY TECHNOLOGY, 2019–2026 (USD MILLION)

TABLE 282 ROMEA: IVD MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 283 ROMEA: IVD MARKET, BY END USER, 2019–2026 (USD MILLION)

TABLE 284 ROMEA: IVD MARKET FOR CLINICAL LABORATORIES, BY TYPE, 2019–2026 (USD MILLION)

## 12 COMPETITIVE LANDSCAPE

### 12.1 OVERVIEW

### 12.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

### 12.3 REVENUE SHARE ANALYSIS FOR KEY PLAYERS IN THE IN VITRO DIAGNOSTICS MARKET

### 12.4 MARKET SHARE ANALYSIS

#### TABLE 285 IN VITRO DIAGNOSTICS MARKET: DEGREE OF COMPETITION

##### 12.4.1 MARKET SHARE ANALYSIS, BY TECHNOLOGY

###### 12.4.1.1 Clinical chemistry

FIGURE 52 CLINICAL CHEMISTRY MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

###### 12.4.1.2 Immunochemistry/immunoassay analyzers

FIGURE 53 IMMUNOASSAYS MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

###### 12.4.1.3 Microbiology

FIGURE 54 MICROBIOLOGY MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

###### 12.4.1.4 Molecular diagnostics

FIGURE 55 MOLECULAR DIAGNOSTICS MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

12.4.1.5 Hematology

FIGURE 56 HEMATOLOGY MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

12.4.1.6 Coagulation & hemostasis

FIGURE 57 COAGULATION & HEMOSTASIS MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

12.4.1.7 Urinalysis

FIGURE 58 URINALYSIS MARKET SHARE ANALYSIS, BY KEY PLAYER (2020)

12.5 R&D ASSESSMENT OF KEY PLAYERS

12.6 GEOGRAPHIC REVENUE ASSESSMENT OF KEY PLAYERS

FIGURE 59 IN VITRO DIAGNOSTICS MARKET: GEOGRAPHIC REVENUE MIX

12.7 COMPANY EVALUATION QUADRANT

12.7.1 STARS

12.7.2 PERVASIVE PLAYERS

12.7.3 EMERGING LEADERS

12.7.4 PARTICIPANTS

FIGURE 60 IN VITRO DIAGNOSTICS MARKET: COMPANY EVALUATION MATRIX, 2020

12.8 COMPETITIVE LEADERSHIP MAPPING FOR SMES & START-UPS

12.8.1 PROGRESSIVE COMPANIES

12.8.2 DYNAMIC COMPANIES

12.8.3 STARTING BLOCKS

12.8.4 RESPONSIVE COMPANIES

FIGURE 61 IN VITRO DIAGNOSTICS MARKET: COMPANY EVALUATION MATRIX FOR SMES & START-UPS

12.9 COMPETITIVE BENCHMARKING

TABLE 286 OVERALL COMPANY FOOTPRINT

TABLE 287 COMPANY FOOTPRINT: BY PRODUCT AND SERVICE

TABLE 288 COMPANY FOOTPRINT: BY TECHNOLOGY

TABLE 289 COMPANY FOOTPRINT: BY APPLICATION

TABLE 290 COMPANY FOOTPRINT: BY END USER

12.10 COMPETITIVE SCENARIO

12.10.1 PRODUCT LAUNCHES & APPROVALS

TABLE 291 PRODUCT LAUNCHES & APPROVALS, 2020–2022

12.10.2 DEALS

TABLE 292 DEALS, 2021

12.10.3 OTHER DEVELOPMENTS

TABLE 293 OTHER DEVELOPMENTS, 2021

## 13 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, MNM view)\*

### 13.1 KEY PLAYERS

#### 13.1.1 ROCHE DIAGNOSTICS

TABLE 294 ROCHE DIAGNOSTICS: BUSINESS OVERVIEW

FIGURE 62 ROCHE DIAGNOSTICS: COMPANY SNAPSHOT (2020)

TABLE 295 PRODUCT LAUNCHES AND APPROVALS

TABLE 296 DEALS

#### 13.1.2 DANAHER CORPORATION

TABLE 297 DANAHER CORPORATION: BUSINESS OVERVIEW

FIGURE 63 DANAHER CORPORATION: COMPANY SNAPSHOT (2020)

TABLE 298 DEALS

#### 13.1.3 ABBOTT LABORATORIES, INC.

TABLE 299 ABBOTT LABORATORIES: BUSINESS OVERVIEW

FIGURE 64 ABBOTT LABORATORIES: COMPANY SNAPSHOT (2020)

TABLE 300 PRODUCT LAUNCHES AND APPROVALS

TABLE 301 DEALS

#### 13.1.4 SIEMENS HEALTHINEERS

TABLE 302 SIEMENS HEALTHINEERS: BUSINESS OVERVIEW

FIGURE 65 SIEMENS HEALTHINEERS: COMPANY SNAPSHOT (2021)

TABLE 303 PRODUCT LAUNCHES AND APPROVALS

TABLE 304 DEALS

TABLE 305 OTHER DEVELOPMENTS

#### 13.1.5 SYSMEX CORPORATION

TABLE 306 SYSMEX CORPORATION: BUSINESS OVERVIEW

FIGURE 66 SYSMEX CORPORATION: COMPANY SNAPSHOT (2020)

TABLE 307 PRODUCT LAUNCHES AND APPROVALS

TABLE 308 DEALS

TABLE 309 OTHER DEVELOPMENTS

#### 13.1.6 THERMO FISHER SCIENTIFIC, INC.

TABLE 310 THERMO FISHER SCIENTIFIC, INC.: BUSINESS OVERVIEW

FIGURE 67 THERMO FISHER SCIENTIFIC, INC.: COMPANY SNAPSHOT (2020)

TABLE 311 PRODUCT LAUNCHES AND APPROVALS

TABLE 312 DEALS

TABLE 313 OTHER DEVELOPMENTS

#### 13.1.7 BECTON, DICKINSON AND COMPANY

TABLE 314 BD: BUSINESS OVERVIEW

FIGURE 68 BD: COMPANY SNAPSHOT (2021)

TABLE 315 PRODUCT LAUNCHES AND APPROVALS

TABLE 316 DEALS

13.1.8 BIOM?RIEUX SA

TABLE 317 BIOM?RIEUX SA: BUSINESS OVERVIEW

FIGURE 69 BIOM?RIEUX SA: COMPANY SNAPSHOT (2020)

TABLE 318 PRODUCT LAUNCHES AND APPROVALS

TABLE 319 DEALS

13.1.9 BIO-RAD LABORATORIES, INC.

TABLE 320 BIO-RAD LABORATORIES, INC.: BUSINESS OVERVIEW

FIGURE 70 BIO-RAD LABORATORIES, INC.: COMPANY SNAPSHOT (2020)

TABLE 321 PRODUCT LAUNCHES AND APPROVALS

TABLE 322 DEALS

13.1.10 JOHNSON & JOHNSON

TABLE 323 JOHNSON & JOHNSON: BUSINESS OVERVIEW

FIGURE 71 JOHNSON & JOHNSON: COMPANY SNAPSHOT (2020)

13.1.11 AGILENT TECHNOLOGIES, INC.

TABLE 324 AGILENT TECHNOLOGIES, INC.: BUSINESS OVERVIEW

FIGURE 72 AGILENT TECHNOLOGIES, INC.: COMPANY SNAPSHOT (2020)

TABLE 325 PRODUCT LAUNCHES AND APPROVALS

TABLE 326 DEALS

13.1.12 QIAGEN N.V.

TABLE 327 QIAGEN N.V.: BUSINESS OVERVIEW

FIGURE 73 QIAGEN N.V.: COMPANY SNAPSHOT (2020)

TABLE 328 PRODUCT LAUNCHES, ENHANCEMENTS, AND APPROVALS

TABLE 329 DEALS

TABLE 330 OTHER DEVELOPMENTS

13.1.13 QUIDEL CORPORATION

TABLE 331 QUIDEL CORPORATION: BUSINESS OVERVIEW

FIGURE 74 QUIDEL CORPORATION: COMPANY SNAPSHOT (2020)

TABLE 332 PRODUCT LAUNCHES AND APPROVALS

TABLE 333 DEALS

TABLE 334 OTHER DEVELOPMENTS

13.1.14 DIASORIN S.P.A.

TABLE 335 DIASORIN S.P.A.: BUSINESS OVERVIEW

FIGURE 75 DIASORIN S.P.A.: COMPANY SNAPSHOT (2020)

TABLE 336 PRODUCT LAUNCHES AND APPROVALS

TABLE 337 DEALS

TABLE 338 OTHER DEVELOPMENTS

### 13.1.15 ILLUMINA, INC.

TABLE 339 ILLUMINA, INC.: BUSINESS OVERVIEW

FIGURE 76 ILLUMINA, INC.: COMPANY SNAPSHOT (2020)

TABLE 340 PRODUCT REGISTRATIONS, LAUNCHES, AND APPROVALS

TABLE 341 DEALS

TABLE 342 OTHER DEVELOPMENTS

\*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

### 13.2 OTHER PLAYERS

#### 13.2.1 ORTHO CLINICAL DIAGNOSTICS HOLDINGS PLC

TABLE 343 ORTHO CLINICAL DIAGNOSTICS HOLDINGS PLC: BUSINESS OVERVIEW

FIGURE 77 ORTHO CLINICAL DIAGNOSTICS HOLDINGS PLC: COMPANY SNAPSHOT (2020)

#### 13.2.2 PERKINELMER INC.

TABLE 344 PERKINELMER, INC.: BUSINESS OVERVIEW

FIGURE 78 PERKINELMER, INC.: COMPANY SNAPSHOT (2020)

#### 13.2.3 CHEMBIO DIAGNOSTICS, INC.

TABLE 345 CHEMBIO DIAGNOSTICS, INC.: BUSINESS OVERVIEW

FIGURE 79 CHEMBIO DIAGNOSTICS, INC.: COMPANY SNAPSHOT (2020)

#### 13.2.4 HOLOGIC, INC.

TABLE 346 HOLOGIC, INC.: BUSINESS OVERVIEW

FIGURE 80 HOLOGIC, INC.: COMPANY SNAPSHOT (2021)

#### 13.2.5 SURMODICS, INC.

TABLE 347 SURMODICS, INC.: BUSINESS OVERVIEW

FIGURE 81 SURMODICS, INC.: COMPANY SNAPSHOT (2020)

#### 13.2.6 SPEEDX PTY. LTD.

#### 13.2.7 GENSPEED BIOTECH GMBH

#### 13.2.8 ACCELERATE DIAGNOSTICS, INC.

#### 13.2.9 MERCK KGAA

#### 13.2.10 CARIS LIFE SCIENCES, INC.

## 14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.3 AVAILABLE CUSTOMIZATIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

## I would like to order

Product name: In-Vitro Diagnostics/IVD Market by Product and Service (Instrument, Kits), Technology (Immunoassay, MDx, Hematology, Urinalysis), Application (Diabetes, Oncology, Cardiology, Nephrology, Infectious Diseases) End User (Hospitals) - Global Forecast to 2026

Product link: <https://marketpublishers.com/r/I0FB171E236EN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/I0FB171E236EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below  
and fax the completed form to +44 20 7900 3970