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IVD Raw Material Market by Product Type (Proteins, Beads, Particles, Antibodies), Technology (Immunoassay, Hematology), Application (Infectious Disease, Diabetes), Supply Source, Origin (Biological, Synthetic), End User (CROs) - Global Forecast to 2031

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Abstracts

The IVD raw material market is projected to grow from USD 21.5 billion in 2026 to USD 31.1 billion by 2031, growing at a CAGR of 7.7%. The increasing prevalence of chronic and infectious diseases, the rising demand for early and accurate disease diagnosis, and the expanding adoption of advanced diagnostic technologies. The growing use of molecular diagnostic techniques such as PCR, NGS, FISH, and LAMP is increasing demand for high-quality oligonucleotides, nucleic acids, enzymes, and other specialized raw materials. At the same time, the rapid expansion of point-of-care testing is driving the need for antibodies, antigens, membranes, labels, and detection materials used in rapid diagnostic assays. Furthermore, advancements in recombinant technologies, protein engineering, and assay development are improving the performance, sensitivity, and reliability of diagnostic tests. These innovations are enabling diagnostic manufacturers to develop more accurate and efficient testing solutions, thereby supporting the growth of the global IVD raw material market.

“The infectious disease testing segment is expected to account for the largest share of the IVD raw material market, by application, during the forecast period.”

Based on application, the IVD raw material market is segmented into infectious disease testing, oncology/cancer markers, cardiac markers, diabetes & metabolic disorders, autoimmune disease, blood screening, women's health & fertility, genetic & rare disease testing, and others. The infectious disease testing segment accounts for the largest market share due to the high global burden of infectious diseases and the increasing

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demand for rapid, accurate, and large-scale diagnostic testing. Diagnostic manufacturers extensively use raw materials such as antibodies, antigens, enzymes, oligonucleotides, nucleic acids, and detection reagents to develop immunoassays, molecular diagnostic tests, and point-of-care testing solutions for detecting bacterial, viral, fungal, and parasitic infections. Additionally, growing investments in public health programs, increasing awareness of early disease diagnosis, and the continued adoption of advanced molecular diagnostic technologies are driving demand for high-quality IVD raw materials in infectious disease testing, making it the largest application segment of the market.

“The immunoassay segment has the largest market share in the IVD raw material market during the forecast period.”

The global IVD raw material market can be segmented by technology into immunoassay, molecular diagnostics, clinical chemistry, hematology, microbiology & culture, coagulation, point-of-care testing, flow cytometry, and others. Among these, the immunoassay segment accounted for the largest market share. Immunoassay-based diagnostics remain a fundamental component of routine disease testing due to their high sensitivity, specificity, cost-effectiveness, and broad application across infectious diseases, oncology, cardiac markers, autoimmune disorders, and hormone testing. The widespread adoption of immunoassay platforms has generated substantial demand for critical raw materials, including antibodies, antigens, proteins, enzymes, labels, and detection reagents. Furthermore, continuous advancements in assay development, increasing diagnostic testing volumes, growing demand for rapid and accurate diagnostic solutions, and the expansion of automated immunoassay analyzers are expected to support the continued adoption of immunoassay technologies, thereby driving demand for IVD raw materials worldwide.

“Asia Pacific: The fastest-growing market for IVD raw material from 2026 to 2031”

The global IVD raw material market is segmented into North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. The Asia Pacific is projected to grow at the highest regional CAGR from 2026 to 2031. The region's growth is driven by the increasing prevalence of chronic and infectious diseases, expanding healthcare infrastructure, rising investments in diagnostic technologies, and growing demand for early and accurate disease diagnosis. China is strengthening its domestic diagnostic manufacturing capabilities through healthcare modernization initiatives and increased investment in biotechnology and life sciences. India is witnessing significant growth in diagnostic testing volumes, supported by the expansion of clinical laboratories and molecular diagnostic facilities, as well as the adoption of point-of-care testing. Additionally, Japan's advanced healthcare system, aging population, and strong focus on precision medicine continue to drive demand for high-quality diagnostic assays and the raw materials required for their development. These factors are expected to support the rapid growth of the IVD raw material market across the Asia Pacific region during the forecast period.

The break-up of the profile of primary participants in the IVD raw market:

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

By Designation: C-level Executives - 27%, Directors – 18%, and Others - 55%

By Region: North America - 51%, Europe - 21%, Asia Pacific - 18%, Latin America – 6%, and Middle East & Africa - 4%

Merck KGaA (Germany), Thermo Fisher Scientific Inc. (U.S.), Medix Biochemica (Finland), Bio-Techne Corporation (U.S.), Fapon Biotech Inc. (China), Meridian Bioscience, Inc. (U.S.), BBI Solutions (U.K.), Toyobo Co., Ltd. (Japan), Roche CustomBiotech (Switzerland), Integrated DNA Technologies, Inc. (U.S.), Cytiva (U.S.), Sartorius AG (Germany), LGC Biosearch Technologies (U.S.), Fitzgerald Industries International (U.S.), and Bangs Laboratories, Inc. (U.S.) are some of the key players operating in the global IVD raw material market.

Research Coverage:

This research report categorizes the IVD raw material market by product type (antibodies, antigens & proteins, enzymes & substrates, oligonucleotides & nucleic acids, beads & particles, membranes, labels & detection materials, buffers & diluents, and others), by technology (immunoassay, molecular diagnostics, clinical chemistry, hematology, microbiology & culture, coagulation, point-of-care testing, flow cytometry, and others), by application (infectious disease testing, oncology/cancer markers, cardiac markers, diabetes & metabolic disorders, autoimmune disease, blood screening, women's health & fertility, genetic & rare disease testing, and others), by supply source (in-house manufacturing [captive] and third-party supply [merchant]), by source/origin (biological/natural source, recombinant/synthetic, and others), by end user (IVD manufacturers, contract research organizations, academic & research institutes, pharmaceutical & biotech companies, and others), and by region (North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, opportunities, and challenges influencing the growth of the IVD raw material market. A detailed analysis of the key industry players has been conducted to provide insights into their business overview, product portfolios, key strategies such as acquisitions, partnerships, collaborations, capacity expansions, and product launches, as well as recent developments associated with the IVD raw material market. Competitive analysis of emerging companies and market participants within the IVD raw materials ecosystem is also covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall IVD raw material market and the subsegments. This report will help stakeholders understand the competitive landscape and gain deeper insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights into the following pointers:

Analysis of key drivers (increasing geriatric population and subsequent rise in chronic diseases, growing awareness of early disease diagnosis in emerging economies, emergence of rapid point-of-care [POC] technologies and rising adoption of automated analyzers, and growing preference for personalized medicine), restraints (unfavorable reimbursement scenario, stringent regulatory requirements), opportunities (introduction of disease-specific biomarkers and tests, increasing significance of companion diagnostics, growth opportunities in developing countries, improvements in immunoassay diagnostic technologies, and the growing digitalization trend), and challenges (maintaining batch-to-batch consistency and quality of raw materials, and supply chain disruptions affecting the availability of critical biological and synthetic reagents) influencing the growth of the IVD raw material market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the IVD raw material market

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Market Development: Comprehensive information about lucrative markets—the report analyzes the IVD raw material market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the IVD raw material market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product portfolios of leading players such as Merck KGaA (Germany), Thermo Fisher Scientific Inc. (U.S.), Medix Biochemica (Finland), Bio-Techne Corporation (U.S.), and Fapon Biotech Inc. (China), among others

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