

# **Opportunities & Gaps in the American IVD Market - by Products & Services (Equipment, Reagents, Services, other), by Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, others), by Therapeutic Area (Infectious Diseases, Tropical Diseases, Lifestyle Disease, Neurology, Oncology, others), by End User (Hospital, Hospital Bed Side, Home Users, Research Labs), By Domestic Versus Global Competition, and by Key Export/Import Destinations**

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## **Abstracts**

The report covers comprehensive view of North, Central and South American IVD market in 2018 and gives insights till 2025, considering the growth trends, domestic and global competition, import/ export trends, disease epidemiology, products and services, technologies and the end user pattern. The report gives a 360 overview of the market and a comparative scenario between north, central and southern American IVD market in 2018.

The American In Vitro Diagnostics (IVD) Market Insights

The North American market is the biggest IVD market, globally and also the biggest consumption market. The San Francisco Bay Area may be often considered as a natural home to well established IVD device leaders responsible for spearheading industry advancements including Bio-Rad, Roche and Thermo Fisher and many other promising startups breaking into the market. Currently it has approximately 30% share of the global market and would exceed the share by 2020, growing at a CAGR of 3.57%

from 2019 till 2025.

In North America, some of the most common routine tests that are conducted in laboratories include cholesterol level tests, HIV tests, pap tests, pregnancy tests, tests to detect infectious diseases and substance abuse tests. Clinical lab testing is also used to monitor other diseases and drug treatments. Specialty testing, which is often more expensive than routine tests cover tests in genetics, immunology, oncology, endocrinology, and other segments. The clinical laboratory market is highly competitive with hundreds of providers. North America has presence of some of the major global players in the world that are headquartered in USA.

Convenient Centers are the new IVD Walk-in Clinics in North America especially the United States. As per the growing trend in 2017-2018, IVD service providers such as Quest Diagnostics (Quest) and Laboratory Corporation of America (LabCorp) and few other laboratories have been actively promoting patient service centers in grocery stores and retail pharmacies. In 2017, Quest had announced plans to open patient services centers with several retailers, particularly in the states of Texas and Florida. Similarly, LabCorp disclosed an agreement with the Walgreens Boots Alliance.

US is one of the leaders in the market which is moving towards value based model, there are few clinical laboratories in the southwestern United States which are looking at how to prevent early term delivery. The San Francisco Bay Area is home to well-established IVD device leaders responsible for spearheading industry advancements including Bio-Rad, Roche and Thermo Fisher and many other promising startups breaking into the market.

Compared to North, Central and South American IVD market enjoys a little over 3% of the global IVD market share. Although the market is small, with limited resources and infrastructure, but it offers opportunities in the form of high disease presence (which requires testing), medical tourism (Peru, Brazil, Argentina get high traffic from USA every year). The report from Stratview research also looks at the smaller market in South America such as Peru while including the bigger markets such as Mexico, Argentina and Brazil.

In South America, markets varies depending on the demand from the population, for e.g. In Brazilian IVD market, 77% of the population rely on the public health care system which makes it challenging for the government to expand its services and reduce the exam time. While in Central America, if we consider markets such as Mexico, the scenario is different and we observe them as early adopters of technology. Public

laboratories are subsidized by the government and usually acquire molecular diagnostics (MoIDx) equipment through reagent rentals rather than outright purchases. This is variable in the private laboratories, but purchasing methods are more dependent on the workload, the type of instrument and the decision makers (typically including the laboratory director and governing board in private laboratories and purchasing departments in public laboratories).

### Research Methodology

Our reports offer high-quality insights and are the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's internal database and statistical tools. More than 1,000 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles have been leveraged to gather the data. About 20 detailed primary interviews with the market players across the value chain in all four regions and industry experts have been executed to obtain both the qualitative and quantitative insights.

### American In Vitro Diagnostics Market Segmentation Central and South America

#### By Long Term Growth Forecast

By Products and Services (2018-2025) (Equipment, Reagents, Services, etc)

By Technology (2018-2025) (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)

By Therapeutic Area (2018-2025) (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)

By End User (2018-2025) (Hospital, Hospital Bed Side, Home Users, Research Labs)

By Domestic Versus Global Competition

By Key Export/Import Destinations

### Mexico IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)

By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)

By Therapeutic Area (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)

By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)

By Domestic Competition

By Global Competition  
Are You Planning To Invest in 2019-2020?

Argentina IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)  
By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)  
By Therapeutic Area (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)  
By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)  
By Domestic Competition  
By Global Competition  
Are You Planning To Invest in 2019-2020

Brazil IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)  
By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)  
By Therapeutic Area (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)  
By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)  
By Domestic Competition  
By Global Competition  
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Peru IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)  
By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)  
By Therapeutic Area (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)  
By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)  
By Domestic Competition  
By Global Competition  
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North America

By Long Term Growth Forecast

*Opportunities & Gaps in the American IVD Market - by Products & Services (Equipment, Reagents, Services, other...*

By Products and Services (2018-2025) (Equipment, Reagents, Services, etc)

Top Three Opportunistic Segments

By Technology (2018-2025) (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)

Top Three Opportunistic Segments

By Therapeutic Area (2018-2025) (Tropical Diseases, Lifestyle Disease, Neurology, Oncology, etc)

Top Three Opportunistic Segments

By End User (2018-2025) (Hospital, Hospital Bed Side, Home Users, Research Labs)

Top Three Opportunistic Segments

By Domestic Versus Global Competition

By Key Export/Import Destinations

USA IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)

By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)

By Therapeutic Area (Infectious Diseases, Lifestyle Disease, Neurology, Oncology, etc)

By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)

By Domestic Versus Global Competition

By Global Competition

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Canada IVD Market – Long Term Growth Forecast (2018e-2025f)

By Products & Services (Equipment, Reagents, Services, etc)

By Technology (Immunology, Molecular Diagnostics, POCT, Microbiology, Hematology, etc)

By Therapeutic Area (Infectious Diseases, Lifestyle Disease, Neurology, Oncology, etc)

By End User (Hospital, Hospital Bed Side, Home Users, Research Labs)

By Domestic Competition

By Global Competition

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