

Acute Care Syndromic Testing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Disease Type (Respiratory Diseases, Gastrointestinal Diseases, Genitourinary Diseases, Tropical Diseases, Others), By Target (Bacteria, Viruses, Fungi, Parasites), By Sample Type (Blood, Urine, Biofluids, Stool, Swabs, Others), By End User (Hospitals, Clinical and Diagnostic Laboratories, Research and Academic Institutions, Others), By Region, Competition

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Abstracts

The Global Acute Care Syndromic Testing Market achieved a valuation of USD 2.89 Billion in 2022 and is poised for substantial growth in the forecast period, projecting a Compound Annual Growth Rate (CAGR) of 5.56% through 2028 and expected to reach at USD 4.00 Billion in 2028. Acute Care Syndromic Testing serves as a diagnostic approach utilized in healthcare settings, particularly in emergency departments and acute care facilities, for swiftly identifying and diagnosing the underlying causes of acute symptoms or conditions in patients. This methodology involves simultaneously testing for multiple pathogens, including viruses, bacteria, and other microorganisms, that could be responsible for a patient's symptoms. The objective is to promptly narrow down potential causes and guide appropriate treatment decisions. Acute care syndromic testing proves particularly invaluable in scenarios where patients exhibit symptoms attributable to various infectious agents. It enables healthcare providers to make timely and well-informed decisions about patient care, isolation protocols, and treatment choices. This testing approach becomes especially critical during disease outbreaks or

pandemics, aiding healthcare systems in effectively managing and responding to a significant influx of patients presenting similar symptoms.

However, it is important to note that the specific types of tests used in acute care syndromic testing may encompass molecular assays (such as polymerase chain reaction or PCR tests), rapid antigen tests, serological tests (for detecting antibodies), and other diagnostic methods. The selection of tests depends on the suspected pathogens and the clinical context.

Key Market Drivers

1. Rise in Infectious Disease Outbreaks Boosts Market Growth:

The escalation of infectious disease outbreaks significantly fuels the expansion of the global acute care syndromic testing market. Outbreaks of infectious diseases generate an elevated demand for rapid and accurate diagnostic solutions, which acute care syndromic testing effectively addresses. This testing approach facilitates the quick identification of the responsible pathogens during outbreaks. Speedy diagnosis enables early detection and the timely implementation of containment strategies, such as isolating infected individuals and enforcing infection control measures. Acute care syndromic testing streamlines patient management by offering a comprehensive analysis of potential pathogens driving an outbreak, which in turn allows for appropriate care planning and treatment. Swiftly identifying the causative agent aids in limiting the spread of the outbreak within the community and healthcare settings. Acute care syndromic testing plays a role in identifying carriers, isolating cases, and curbing further transmission.

2. Increasing Demand for Timely Diagnostics Drives Growth:

The growing need for timely diagnostics plays a pivotal role in propelling the global acute care syndromic testing market. Timely diagnostics hold vital importance across various medical conditions, particularly in acute care settings where rapid and precise diagnosis can significantly influence patient outcomes. Prompt and accurate diagnosis is especially crucial in emergency departments and acute care facilities. Acute care syndromic testing provides a comprehensive assessment of potential pathogens, enabling healthcare providers to promptly pinpoint the cause of symptoms and initiate suitable treatment strategies. Acute care syndromic testing platforms are designed to deliver swift results, often within a matter of hours. This rapid turnaround time proves vital in situations where immediate diagnosis is imperative to prevent disease

progression and complications. Timely diagnostics enhance the efficiency of healthcare providers in managing patients' conditions, facilitating patient triage, isolation protocols, and targeted interventions. Unlike traditional diagnostic methods that can experience delays due to laboratory processing times and sample transportation, acute care syndromic testing mitigates the risk of such delays, ensuring timely diagnoses and treatments. Rapid diagnosis through this approach can lead to improved patient outcomes, with early initiation of appropriate therapies reducing the severity of illness, mortality rates, and complications.

3. Increased Adoption of Point-of-Care Testing Drives Growth:

The heightened adoption of point-of-care (POC) testing serves as a significant driver for the growth of the global acute care syndromic testing market. Point-of-Care Testing refers to diagnostic testing performed at or near the patient's location, facilitating immediate results that guide swift clinical decision-making. Acute care syndromic testing, when integrated into POC platforms, enables the rapid identification of pathogens responsible for acute symptoms, resulting in more timely and suitable interventions. POC testing eliminates the need to transport samples to centralized laboratories, reducing turnaround times for results. In environments like acute care settings where time sensitivity is paramount, POC testing accelerates the initiation of appropriate therapies. Traditional laboratory testing often entails sending samples to central labs, leading to extended waiting times for results. POC testing obviates the need for sample transportation and processing delays, ensuring that patients receive rapid diagnoses. POC testing facilitates comprehensive patient care at the point of care, minimizing the necessity for patients to move within a facility for testing. This proves especially valuable for critically ill patients with limited mobility. POC testing optimizes healthcare resource allocation by reducing the requirement for additional tests, consultations, and procedures. This can yield cost savings and enhance healthcare efficiency. During emergencies, POC testing offers crucial diagnostic information rapidly, empowering healthcare providers to make informed decisions and prioritize patient care.

Key Market Challenges

1. Competition from other Diagnostic Tests:

Syndromic testing contends with other diagnostic tests such as molecular diagnostics and serological diagnostics. These tests may provide more accurate information about the underlying cause of syndromes. Molecular diagnostics can pinpoint the specific

pathogen causing the syndrome, while serological diagnostics can detect the presence of antibodies to the pathogen. These insights can guide diagnoses and treatment decisions. Healthcare providers may be accustomed to employing traditional diagnostic methods they are already familiar with, potentially leading to reluctance in adopting newer syndromic testing approaches. Diagnostic methods that have a long-standing history and established reliability may hold favor with healthcare professionals, making it challenging for syndromic testing to gain acceptance.

2. Quality Control and Standardization:

Quality control and standardization pose significant challenges in the global acute care syndromic testing market. Ensuring consistent and accurate results across different syndromic testing platforms and assays is essential for the reliability and reproducibility of diagnostic outcomes. Syndromic testing platforms may employ diverse technologies, chemistries, and reagents, which can lead to variability in assay performance. Variances in sensitivity, specificity, and limit of detection can impact result accuracy and reliability. Syndromic testing may be conducted in various laboratory settings, including clinical laboratories, hospitals, and point-of-care facilities. Inter-laboratory variability in testing procedures, equipment, and personnel expertise can affect result consistency. Syndromic testing assays targeting multiple pathogens simultaneously need to minimize cross-reactivity or interference between different targets. Cross-reactivity can yield false-positive or false-negative results.

3. Integration with Healthcare Systems:

Integrating syndromic testing technologies into existing healthcare systems and workflows is a significant challenge in the global acute care syndromic testing market. Seamless integration is crucial to maximize the benefits and widespread adoption of these technologies. Syndromic testing platforms need to be compatible with existing healthcare information systems, electronic health records (EHRs), and laboratory information management systems (LIMS). Ensuring smooth data exchange and interoperability can be technically complex. Syndromic testing generates substantial data that requires secure management, storage, and access by relevant healthcare professionals. Establishing robust data management and connectivity solutions is essential. Designing user-friendly interfaces that enable healthcare providers to easily access and interpret syndromic testing results within their existing workflow presents its own challenges. The design of user interfaces must prioritize usability and efficiency. Healthcare personnel, including clinicians, laboratory technicians, and IT staff, require training to effectively use and integrate syndromic testing technologies. Training

programs must be comprehensive and ongoing. Introducing new technologies often necessitates changes to established clinical and laboratory workflows. Overcoming resistance to change and ensuring a smooth transition are crucial for successful integration.

Key Market Trends

1. Rise of Point-of-Care Testing (POCT):

The rise of Point-of-Care Testing (POCT) emerges as a significant trend in the global Acute Care Syndromic Testing Market. Point-of-Care Testing pertains to diagnostic testing conducted at or near the patient's location, delivering rapid results that guide immediate clinical decision-making. POCT empowers healthcare providers to swiftly diagnose and initiate treatment plans, particularly in acute care settings where time sensitivity is paramount. Acute care syndromic testing, when adapted for POCT platforms, facilitates the prompt identification of pathogens responsible for acute symptoms, resulting in more timely and suitable interventions. Syndromic testing at the point of care eliminates the need to send samples to centralized laboratories, thereby reducing turnaround times for results. This rapidity is crucial in managing acute conditions and outbreaks, where swift decisions are essential. Point-of-care syndromic testing enables healthcare providers to make well-informed decisions at the bedside. Immediate results guide isolation measures, treatment choices, and patient management strategies, collectively enhancing overall care. During situations like infectious disease outbreaks, POCT-based acute care syndromic testing contributes to rapid containment by swiftly identifying cases and implementing appropriate control measures to forestall further spread. POCT optimizes resource allocation by negating the need for unnecessary transfers, repeat tests, and prolonged hospital stays. This efficiency is particularly pertinent in acute care scenarios marked by resource constraints. In the face of events like large gatherings or disaster responses, point-of-care syndromic testing can offer rapid screening for infectious diseases, aiding in swift identification and management of potential outbreaks. POCT can be especially advantageous in remote or underserved regions with limited access to central laboratories. Acute care syndromic testing at the point of care bridges diagnostic gaps, enhancing real-time disease surveillance, early detection of emerging pathogens, and timely public health responses.

Segmental Insights

Disease Type Insights

In 2022, the Respiratory Diseases Segment dominated the Acute Care Syndromic Testing Market and is projected to continue its expansion in the upcoming years. Respiratory diseases are among the leading global causes of death. According to the World Health Organization (WHO), respiratory diseases accounted for an estimated 4.1 million deaths in 2019. Respiratory diseases often manifest rapidly, making diagnosis and treatment challenging. Syndromic testing plays a crucial role in identifying the root cause of these diseases and initiating treatment promptly. Given that respiratory diseases often share common symptoms such as cough, fever, and shortness of breath, acute care syndromic testing proves instrumental in distinguishing between various respiratory pathogens and guiding appropriate treatment strategies. The significance of respiratory diseases in terms of public health impact, rapid transmission, and widespread consequences underscores the importance of effective outbreak management and containment through acute care syndromic testing. This segment is anticipated to experience the highest Compound Annual Growth Rate (CAGR) from 2023 to 2030.

Target Insights

In 2022, the Bacteria Segment took precedence in the Acute Care Syndromic Testing Market and is forecasted to maintain its growth momentum in the years ahead. Bacteria are simple cells containing genetic information in a singular loop, and they can cause a range of infections affecting both humans and animals. Bacterial infections can manifest in various body parts, including the skin, brain, lungs, blood, and others. Bacterial infections often progress rapidly, posing challenges for diagnosis and treatment. Acute care syndromic testing plays a pivotal role in identifying the underlying cause of bacterial infections, facilitating early intervention. Given that bacterial infections can be contagious, prompt diagnosis becomes essential to prevent disease transmission. With its rapid results, syndromic testing proves effective in enhancing patient outcomes.

Sample Insight

In 2022, the Swabs Segment dominated the Acute Care Syndromic Testing Market and is projected to sustain its growth trajectory in the future. Nasopharyngeal swabs are particularly efficient in collecting samples from the upper respiratory tract, where various respiratory pathogens, including viruses like influenza and coronaviruses, are commonly found. Nasopharyngeal swabs provide direct access to the nasopharynx, often the initial site of infection for many respiratory viruses. This proximity enhances the sensitivity of pathogen detection.

End-User Insight

In 2022, the Hospital Segment held a prominent position in the Acute Care Syndromic Testing Market and is expected to continue expanding. Hospitals constitute primary settings for managing acute medical conditions, emergencies, and outbreaks. Syndromic testing proves particularly indispensable in these environments for promptly diagnosing and managing patients with urgent healthcare needs. Hospitals accommodate a diverse patient population and often handle high patient volumes, making them pivotal for syndromic testing. Rapidly identifying a wide array of pathogens is critical for patient care and infection control. Hospital emergency departments encounter a significant influx of acute cases, and syndromic testing streamlines triage and decision-making in such situations, enabling timely interventions.

Regional Insights

North America has established itself as a frontrunner in the Global Acute Care Syndromic Testing Market. The United States and Canada, in particular, possess advanced and well-developed healthcare infrastructure that fosters the swift adoption and integration of innovative diagnostic technologies, including acute care syndromic testing. The region is a hub for technological innovation and healthcare research, driving the development of cutting-edge syndromic testing platforms and solutions.

Please feel free to reach out for further information or additional insights.

Key Market Players

Abbott Laboratories

Becton, Dickinson and Company

Biocartis NV

bioMérieux SA (BioFire Diagnostics)

Danaher Corporation (Cepheid, Inc.)

DiaSorin S.p.A (Luminex Corporation)

Eurofins Scientific (Eurofins Viracor)

Hologic Inc.

Laboratory Corporation of America Holdings.

QIAGEN N.V.

QuantuMDx Group Ltd

Report Scope:

In this report, the Global Acute Care Syndromic Testing Markets Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Acute Care Syndromic Testing Market, By Disease Type:

Respiratory Diseases

Gastrointestinal Diseases

Genitourinary Diseases

Tropical Diseases

Others

Acute Care Syndromic Testing Market, By Target:

Bacteria

Fungi

Viruses

Parasites

Acute Care Syndromic Testing Market, By Sample Type:

Blood

Urine

Biofluids

Stool

Swabs

Others

Acute Care Syndromic Testing Market, By End User:

Hospitals

Clinical & Diagnostics Laboratories

Research & Academic Institutions

Others

Global Acute Care Syndromic Testing Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

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Acute Care Syndromic Testing Market.

Available Customizations:

Global Acute Care Syndromic Testing Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Disease Type (Respiratory Diseases, Gastrointestinal Diseases, Genitourinary Diseases, Tropical Diseases, Others)
 - 5.2.2. By Target (Bacteria, Viruses, Fungi, Parasites)

- 5.2.3. By Sample Type (Blood, Urine, Biofluids, Stool, Swabs, Others)
- 5.2.4. By End User (Hospitals, Clinical & Diagnostics Laboratories, Research & Academic Institutions, Others)
- 5.2.5. By Company (2022)
- 5.2.6. By Region
- 5.3. Market Map

6. NORTH AMERICA ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Disease Type
 - 6.2.2. By Target
 - 6.2.3. By Sample Type
 - 6.2.4. By End User
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Acute Care Syndromic Testing Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Disease Type
 - 6.3.1.2.2. By Target
 - 6.3.1.2.3. By Sample Type
 - 6.3.1.2.4. By End User
 - 6.3.2. Mexico Acute Care Syndromic Testing Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Disease Type
 - 6.3.2.2.2. By Target
 - 6.3.2.2.3. By Sample Type
 - 6.3.2.2.4. By End User
 - 6.3.3. Canada Acute Care Syndromic Testing Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Disease Type

- 6.3.3.2.2. By Target
- 6.3.3.2.3. By Sample Type
- 6.3.3.2.4. By End User

7. EUROPE ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Disease Type
 - 7.2.2. By Target
 - 7.2.3. By Sample Type
 - 7.2.4. By End User
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France Acute Care Syndromic Testing Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Disease Type
 - 7.3.1.2.2. By Target
 - 7.3.1.2.3. By Sample Type
 - 7.3.1.2.4. By End User
 - 7.3.2. Germany Acute Care Syndromic Testing Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Disease Type
 - 7.3.2.2.2. By Target
 - 7.3.2.2.3. By Sample Type
 - 7.3.2.2.4. By End User
 - 7.3.3. United Kingdom Acute Care Syndromic Testing Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Disease Type
 - 7.3.3.2.2. By Target
 - 7.3.3.2.3. By Sample Type
 - 7.3.3.2.4. By End User

7.3.4. Italy Acute Care Syndromic Testing Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Disease Type

7.3.4.2.2. By Target

7.3.4.2.3. By Sample Type

7.3.4.2.4. By End User

7.3.5. Spain Acute Care Syndromic Testing Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Disease Type

7.3.5.2.2. By Target

7.3.5.2.3. By Sample Type

7.3.5.2.4. By End User

8. ASIA-PACIFIC ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Disease Type

8.2.2. By Target

8.2.3. By Sample Type

8.2.4. By End User

8.2.5. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Acute Care Syndromic Testing Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Disease Type

8.3.1.2.2. By Target

8.3.1.2.3. By Sample Type

8.3.1.2.4. By End User

8.3.2. India Acute Care Syndromic Testing Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Disease Type
 - 8.3.2.2.2. By Target
 - 8.3.2.2.3. By Sample Type
 - 8.3.2.2.4. By End User
- 8.3.3. South Korea Acute Care Syndromic Testing Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Disease Type
 - 8.3.3.2.2. By Target
 - 8.3.3.2.3. By Sample Type
 - 8.3.3.2.4. By End User
- 8.3.4. Japan Acute Care Syndromic Testing Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Disease Type
 - 8.3.4.2.2. By Target
 - 8.3.4.2.3. By Sample Type
 - 8.3.4.2.4. By End User
- 8.3.5. Australia Acute Care Syndromic Testing Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Disease Type
 - 8.3.5.2.2. By Target
 - 8.3.5.2.3. By Sample Type
 - 8.3.5.2.4. By End User

9. SOUTH AMERICA ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Disease Type
 - 9.2.2. By Target
 - 9.2.3. By Sample Type
 - 9.2.4. By End User

9.2.5. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Acute Care Syndromic Testing Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Disease Type

9.3.1.2.2. By Target

9.3.1.2.3. By Sample Type

9.3.1.2.4. By End User

9.3.2. Argentina Acute Care Syndromic Testing Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Disease Type

9.3.2.2.2. By Target

9.3.2.2.3. By Sample Type

9.3.2.2.4. By End User

9.3.3. Colombia Acute Care Syndromic Testing Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Disease Type

9.3.3.2.2. By Target

9.3.3.2.3. By Sample Type

9.3.3.2.4. By End User

10. MIDDLE EAST AND AFRICA ACUTE CARE SYNDROMIC TESTING MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Disease Type

10.2.2. By Target

10.2.3. By Sample Type

10.2.4. By End User

10.2.5. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Acute Care Syndromic Testing Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Disease Type

10.3.1.2.2. By Target

10.3.1.2.3. By Sample Type

10.3.1.2.4. By End User

10.3.2. Saudi Arabia Acute Care Syndromic Testing Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Disease Type

10.3.2.2.2. By Target

10.3.2.2.3. By Sample Type

10.3.2.2.4. By End User

10.3.3. UAE Acute Care Syndromic Testing Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Disease Type

10.3.3.2.2. By Target

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Recent Developments

12.2. Product Launches

12.3. Mergers & Acquisitions

13. PESTLE ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

15. COMPETITIVE LANDSCAPE

- 15.1. Business Overview
- 15.2. Company Snapshot
- 15.3. Products & Services
- 15.4. Financials (In case of listed companies)
- 15.5. Recent Developments
- 15.6. SWOT Analysis
 - 15.6.1. Abbott Laboratories
 - 15.6.2. Becton, Dickinson and Company
 - 15.6.3. Biocartis NV
 - 15.6.4. bioMerieux SA (BioFire Diagnostics)
 - 15.6.5. Danaher Corporation (Cepheid, Inc.)
 - 15.6.6. DiaSorin S.p.A (Luminex Corporation)
 - 15.6.7. Eurofins Scientific (Eurofins Viracor)
 - 15.6.8. Karius
 - 15.6.9. Laboratory Corporation of America Holdings.
 - 15.6.10. QIAGEN N.V.
 - 15.6.11. QuantuMDx Group Ltd.

16. STRATEGIC RECOMMENDATIONS

I would like to order

Product name: Acute Care Syndromic Testing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Disease Type (Respiratory Diseases, Gastrointestinal Diseases, Genitourinary Diseases, Tropical Diseases, Others), By Target (Bacteria, Viruses, Fungi, Parasites), By Sample Type (Blood, Urine, Biofluids, Stool, Swabs, Others), By End User (Hospitals, Clinical and Diagnostic Laboratories, Research and Academic Institutions, Others), By Region, Competition

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