

Emerging Infectious Disease Diagnostics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Laboratory Testing and Point of Care Testing), By Technology (Polymerase chain reaction, Immunodiagnosics, Isothermal Nucleic Acid Amplification Technology (INAAT), Next-Generation Sequencing (NGS), and Others), By Type of Infection (Bacterial, Viral, Fungal, and Others), By Disease Type (Respiratory Infections, Gastrointestinal Infections, Sexually Transmitted Infections (STIs), and Others), By End user (Hospitals & Clinics, Diagnostic laboratories, and Others), By Region and Competition, 2019-2029F

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Abstracts

Global Emerging Infectious Disease Diagnostics Market was valued at USD 15.24 Billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 8.55% through 2029. The Global Emerging Infectious Disease Diagnostics Market represents a sector dedicated to the development, production, and distribution of diagnostic tools and tests designed to detect novel and re-emerging infectious diseases. This market has gained immense significance due to the increasing occurrence of epidemics and pandemics, such as COVID-19, which require rapid and accurate diagnostics to effectively manage and contain outbreaks. The field is characterized by innovations in technology, such as molecular diagnostics and point-of-care testing devices, which are vital in enhancing the speed and efficiency of

disease detection and response strategies around the world.

Key Market Drivers

Increasing Prevalence of Infectious Diseases

The increasing prevalence of infectious diseases is a key driving force behind the growth and expansion of the global Emerging Infectious Disease Diagnostics Market. Infectious diseases are caused by pathogens such as bacteria, viruses, fungi, and parasites, and they can be transmitted from person to person or through vectors like mosquitoes or contaminated food and water.

The emergence of novel infectious diseases, such as COVID-19, Ebola, Zika, and others, has highlighted the importance of early detection and rapid response to contain outbreaks. These diseases can spread rapidly and have the potential to cause significant morbidity and mortality, leading to a growing demand for accurate and timely diagnostic tests to identify and manage them effectively. There are many other factors contributing to the increasing prevalence of infectious diseases including globalization, urbanization, climate change, and changes in human behavior.

Globalization has made it easier for infectious agents to spread from country to country through travel and trade. This makes it possible for pathogens to enter new countries and infect new people. Urbanization has increased the number of people living in cities, which creates an environment conducive to the transmission of infections. Climate change has changed the vectors' distribution and behavior, which has had an impact on vector-borne diseases such as malaria, dengue, etc. Changes in human behavior, such as deforestation and the consumption of wildlife, can increase the likelihood of zoonotic diseases jumping from animals to humans.

As a result of these factors, the burden of infectious diseases continues to rise, driving the demand for diagnostic solutions that can quickly and accurately identify these diseases. The global Emerging Infectious Disease Diagnostics Market encompasses a wide range of diagnostic technologies, including molecular diagnostics, serological tests, point-of-care testing, and advanced imaging techniques. Governments, healthcare organizations, and research institutions are actively investing in the development and implementation of these diagnostic tools to strengthen disease surveillance, improve outbreak preparedness, and enhance public health responses therefore, the increasing prevalence of infectious diseases presents

significant challenges to global health and underscores the importance of robust and efficient diagnostic solutions. The global Emerging Infectious Disease Diagnostics Market is propelled by the urgent need to detect and manage these diseases effectively, and ongoing advancements in diagnostic technologies will play a crucial role in curbing the impact of infectious diseases and safeguarding public health worldwide.

Increase In Funding from Private & Government Organizations

Government support and funding play an important role in expanding the market for diagnostics for infectious diseases. Governments can fund research and development of diagnostic technologies and implement targeted programs to develop new and effective diagnostic tools. In 2020, the Government of India announced the setting up of three new high throughput Indian Council of Medical Research (ICMR) laboratories in Kolkata, Mumbai, and Noida to increase the COVID-19 test capacity. In addition to COVID-19, these labs are used for other diagnosis tests for infectious diseases like HIV, hepatitis, tuberculosis, and dengue. Rising awareness of early diagnosis and treatment of infectious diseases and growing number of IT systems to develop advanced diagnostic equipment are expected to provide lucrative opportunities for expanding the global infectious disease diagnostics market in the coming years.

Government-sponsored grants and incentives also increase the cost and availability of diagnostics, allowing vulnerable populations to receive timely and high-quality diagnostics. Government-sponsored public health monitoring and control programs necessitate large-scale testing, increasing the need for diagnostics. Regulatory support from government agencies expedites the approval process for new diagnostic products, facilitating their entry into the market. Government initiatives focusing on epidemic preparedness and response boost the demand for diagnostics during outbreaks. Public awareness campaigns further stimulate the demand as they educate the population about the importance of early diagnosis.

Technology Advancement in The Field of Infectious Disease Diagnostics

Innovations in molecular biology and genomics, as well as automation, have had a major influence on the emerging diagnostic market for infectious diseases. Diagnostic methods have evolved to detect infectious agents more quickly and accurately. With the advent of next-generation sequencing (NGS), imaging technologies, and point of care (POC) diagnostic equipment, diagnostics have become faster and more sensitive, allowing for earlier detection of emerging pathogens. Telemedicine and digital health platforms have enhanced remote diagnosis and data sharing, enabling real-time

surveillance and response to outbreaks. These innovations attract increased investment from both public and private sectors, leading to the development of cutting-edge diagnostic solutions. As technology continues to evolve, it is likely to further drive the market by expanding capabilities, improving cost-effectiveness, and ultimately aiding in the control and containment of emerging infectious diseases. Neberg Diagnostic is a leading provider of top-of-the-line laboratories.

Expansion of Point-Of-Care Diagnostic Platforms

The expansion of point-of-care (POC) diagnostic platforms is significantly increasing the demand for emerging infectious disease diagnostics globally. These POC platforms offer rapid and convenient testing capabilities outside of traditional laboratory settings, enabling timely diagnosis and management of infectious diseases at the point of patient care. As emerging infectious diseases continue to pose significant public health threats, the need for rapid and accurate diagnostics is paramount for effective outbreak control and containment. POC diagnostic platforms empower healthcare providers to quickly identify infectious pathogens, initiate appropriate treatments, and implement infection control measures, thereby reducing transmission rates and mitigating the spread of disease. The growing availability and adoption of POC diagnostic platforms are driving demand for emerging infectious disease diagnostics, stimulating innovation in diagnostic technologies and expanding access to diagnostic testing in diverse healthcare settings globally.

Key Market Challenges

Limited Access to Diagnostic Tools

Limited access to diagnostic tools is a significant factor decreasing the demand for emerging infectious disease diagnostics globally. In many regions, particularly in low- and middle-income countries, healthcare systems face challenges in accessing and implementing advanced diagnostic technologies due to factors such as limited infrastructure, inadequate funding, and workforce shortages. As a result, healthcare providers often rely on conventional diagnostic methods that may lack sensitivity, specificity, and timeliness in detecting emerging infectious diseases.

Limited access to diagnostic tools hampers the ability to promptly diagnose and respond to outbreaks, leading to delays in containment efforts and exacerbating the spread of infectious pathogens. The high cost of acquiring and maintaining advanced diagnostic equipment poses a barrier to adoption, particularly in resource-

constrained settings. Addressing these challenges requires concerted efforts to improve access to affordable and portable diagnostic tools, strengthen laboratory capacity, and enhance training programs for healthcare personnel. By overcoming barriers to access, the demand for emerging infectious disease diagnostics can be bolstered, facilitating more effective disease surveillance, outbreak response, and public health interventions globally.

Genetic Mutation of Pathogens

The genetic mutation of pathogens presents a challenge that decreases the demand for emerging infectious disease diagnostics globally. Pathogens, especially viruses and bacteria, have the capacity to mutate rapidly, leading to the emergence of new strains or variants with altered characteristics. These genetic mutations can affect the accuracy and reliability of diagnostic tests designed to detect specific pathogens, as the genetic changes may impact the binding affinity of diagnostic reagents or alter the target sequences recognized by molecular assays.

Existing diagnostic tools may become less effective in identifying newly evolved strains, resulting in decreased demand for these diagnostics. The complexity of genetic mutations can complicate the development and validation of new diagnostic assays tailored to emerging pathogen variants, further dampening demand. Addressing the challenge of genetic mutation requires ongoing surveillance efforts, continuous refinement of diagnostic technologies, and agile response strategies to adapt to evolving pathogens, thereby ensuring the effectiveness of emerging infectious disease diagnostics in a dynamic global health landscape.

Key Market Trends

Integration of Artificial Intelligence in Diagnostics

The integration of artificial intelligence (AI) in diagnostics is significantly increasing the demand for emerging infectious disease diagnostics globally. AI-powered diagnostic systems leverage advanced algorithms and machine learning techniques to analyze complex datasets, identify patterns, and generate accurate diagnostic results with unprecedented speed and accuracy. In the context of emerging infectious diseases, where timely detection and rapid response are critical, AI-enabled diagnostics offer invaluable capabilities for early detection, outbreak surveillance, and predictive modeling. These AI-driven solutions enable healthcare providers to quickly identify novel pathogens, track disease transmission dynamics, and inform public health

interventions, thereby enhancing preparedness and response efforts. As the global burden of emerging infectious diseases continues to rise, fueled by factors such as urbanization, globalization, and climate change, the demand for AI-driven diagnostic solutions is surging. Consequently, there is growing investment in AI-based diagnostic technologies and increased adoption of these innovative tools in healthcare systems worldwide, driving market growth and fostering innovation in emerging infectious disease diagnostics.

Escalating Number of Hospital-Acquired Infections

The escalating number of hospital-acquired infections is significantly increasing the demand for emerging infectious disease diagnostics globally. Hospital-acquired infections (HAIs) pose a significant threat to patient safety, leading to increased morbidity, mortality, and healthcare costs. With the emergence of multidrug-resistant pathogens and the persistence of healthcare-associated outbreaks, there is a growing urgency to implement robust diagnostic strategies for early detection and effective management of these infections. Emerging infectious disease diagnostics play a crucial role in identifying and controlling HAIs by enabling healthcare providers to quickly identify the causative pathogens, determine antimicrobial susceptibilities, and implement targeted infection control measures. As healthcare facilities strive to enhance infection prevention and control practices to mitigate the risk of HAIs, there is a heightened demand for advanced diagnostic technologies capable of rapidly and accurately detecting both known and novel pathogens associated with hospital-acquired infections. The escalating number of HAIs is driving the adoption of emerging infectious disease diagnostics globally, underscoring the critical role of diagnostic innovation in safeguarding patient health and improving healthcare outcomes.

Segmental Insights

Application Insights

Based on the Application, Laboratory Testing has traditionally emerged as the fastest growing segment in the market due to its high level of accuracy, ability to handle large test volumes, and the availability of advanced testing capabilities. In recent times, Point of Care Testing (POCT) has garnered significant attention due to its swift diagnostic capabilities, convenience, and its pivotal role in facilitating prompt decision-making directly at the patient's side.

Point of Care Testing enables healthcare providers to swiftly obtain test results at the

patient's bedside, enabling immediate treatment decisions and minimizing the interval between testing and diagnosis. This is particularly advantageous in emergency scenarios or in settings with limited resources, where time is of the essence. Despite the rising popularity of POCT, Laboratory Testing maintains a significant market share. This is partly attributed to technological advancements that have enhanced the speed and effectiveness of laboratory tests, alongside the intricate nature of certain tests that require sophisticated laboratory equipment and expertise. Laboratory testing offers a comprehensive analysis of samples, facilitating a thorough assessment of a patient's condition.

End User Insights

Based on the end user segment, the global Emerging Infectious Disease Diagnostics Market is currently dominated by hospitals & clinics, which serve as critical hubs for infectious disease detection and treatment. These healthcare establishments serve as vital hubs in delivering comprehensive resources for swift testing, precise diagnosis, and optimal patient management. With a considerable influx of patients, hospitals and clinics are well-prepared to address the urgent demand for infection control protocols, safeguarding the safety and welfare of both patients and healthcare staff. Their commitment to delivering high-quality care and their capacity to adjust to emerging infectious disease threats are key factors contributing substantially to the dominant position of hospitals and clinics in the market.

Regional Insights

The North American region currently dominates the Global Emerging Infectious Disease Diagnostics Market. This dominance is attributed to several factors, including an advanced healthcare infrastructure that enables efficient diagnosis and treatment of infectious diseases. The region's high healthcare expenditure signifies the commitment towards ensuring the well-being of its population. North America has a strong presence of leading diagnostic companies that constantly innovate and develop cutting-edge diagnostic solutions. This, coupled with the increased incidence of infectious diseases, creates a conducive environment for the growth of the diagnostics market in the region.

The swift adoption of advanced technologies in diagnostics, such as molecular diagnostics and point-of-care testing, plays a crucial role in sustaining North America's market leadership. These technologies allow for rapid and accurate detection of infectious diseases, enabling timely intervention and effective disease management. The combination of advanced healthcare infrastructure, high healthcare expenditure,

presence of leading diagnostic companies, increased incidence of infectious diseases, and the adoption of advanced technologies positions North America at the forefront of the Emerging Infectious Disease Diagnostics Market.

Key Market Players

BioMérieux SA

Bio-Rad Laboratories, Inc.

Becton Dickinson & Company

Agilent Technologies, Inc.

Abbott Laboratories, Inc

ThermoFisher Scientific, Inc

Roche Diagnostics Corporation

DiaSorin SpA

F. Hoffmann-La Roche Ltd.

Danaher Corporation

Report Scope:

In this report, the Global Emerging Infectious Disease Diagnostics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Emerging Infectious Disease Diagnostics Market, By Application:

Laboratory Testing

Point of Care Testing

Emerging Infectious Disease Diagnostics Market, By Technology:

Polymerase Chain Reaction

Immunodiagnosics

Isothermal Nucleic Acid Amplification Technology (INAAT)

Next-Generation Sequencing (NGS)

Others

Emerging Infectious Disease Diagnostics Market, By Type of Infection:

Bacterial

Viral

Fungal

Others

Emerging Infectious Disease Diagnostics Market, By Disease Type:

Respiratory Infections

Gastrointestinal Infections

Sexually Transmitted Infections (STIs)

Others

Emerging Infectious Disease Diagnostics Market, By End User:

Hospitals & Clinics

Diagnostic laboratories

Others

Emerging Infectious Disease Diagnostics Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

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 Emerging Infectious Disease Diagnostics Market.

Available Customizations:

Global Emerging Infectious Disease Diagnostics market report with the given market data, TechSci 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).

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