

In Vitro Diagnostics Quality Control Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Quality Controls, Data Management Solutions, Quality Assurance Services), By Application (Immunoassay, Hematology, Clinical Chemistry, Molecular Diagnostics, Coagulation, Microbiology, Others), By End-use (Hospitals & Clinics, Ambulatory Surgical Centers, Others) Region and Competition

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Abstracts

Global In Vitro Diagnostics Quality Control Market was valued at USD 988.02 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 1.54% through 2028. The Global In Vitro Diagnostics Quality Control Market represents a dynamic and essential sector within the broader healthcare industry, focused on ensuring the accuracy and reliability of diagnostic tests conducted outside the human body. In vitro diagnostics (IVD) quality control plays a pivotal role in guaranteeing the precision of clinical laboratory results, which, in turn, influences patient diagnoses and treatment decisions. This market is characterized by a diverse range of products and services designed to monitor the performance of diagnostic instruments, reagents, and test systems, ultimately enhancing patient safety and healthcare outcomes.

Key drivers behind the growth of the Global In Vitro Diagnostics Quality Control Market include the increasing prevalence of chronic diseases, a rising geriatric population, and the growing demand for advanced diagnostic technologies. Laboratories and healthcare institutions are under constant pressure to meet stringent regulatory requirements and maintain the highest standards of accuracy, prompting them to invest in quality control

solutions.

Market participants include established IVD quality control providers, as well as emerging companies leveraging innovative technologies and methodologies. Quality control products encompass a wide array of offerings, including quality control materials, software solutions, and data management systems. These tools enable laboratories to detect errors, standardize procedures, and troubleshoot issues in real-time, thereby improving the quality of diagnostic results.

Key Market Drivers

Rising Prevalence of Chronic Diseases

The rising prevalence of chronic diseases is a compelling driver behind the growing prominence of the Global In Vitro Diagnostics Quality Control Market. Chronic diseases, such as diabetes, cardiovascular conditions, cancer, and respiratory ailments, are becoming increasingly prevalent worldwide. These conditions necessitate frequent diagnostic testing, which is fundamental to disease management, early detection, and treatment evaluation. In this context, the demand for quality control solutions has surged, driven by the imperative need to maintain the integrity of diagnostic tests.

As the global population continues to age and lifestyles become increasingly sedentary, the incidence of chronic diseases has skyrocketed. The elderly population, in particular, faces a higher risk of chronic ailments, and they require routine diagnostic tests to monitor their health status and manage their conditions effectively. Reliable and accurate diagnostic results are non-negotiable for the elderly, who often have complex healthcare needs, further underscoring the significance of quality control in ensuring consistent and dependable diagnostic outcomes.

Furthermore, the advent of advanced diagnostic technologies has been a game-changer in the healthcare landscape. Modern diagnostic tools offer superior sensitivity and specificity, enabling the early detection of chronic diseases and more precise disease monitoring. However, these sophisticated technologies also introduce greater complexity, increasing the potential for errors or inconsistencies. Quality control materials and software solutions play a crucial role in validating and maintaining the performance of these advanced diagnostic tools. As healthcare providers and patients alike become more dependent on these technologies, the demand for quality control becomes even more pronounced.

Aging Population

The aging population is a significant catalyst behind the burgeoning Global In Vitro Diagnostics Quality Control Market. As the world's demographics evolve, with a notable increase in the elderly population, the demand for reliable and accurate diagnostic tests has witnessed a substantial upswing. The elderly are more susceptible to a wide range of health issues, including chronic diseases, and consequently require frequent diagnostic testing to monitor their health, assess disease progression, and evaluate treatment efficacy. This heightened need for diagnostic assessments in the aging demographic underscores the crucial role of quality control in maintaining the accuracy and dependability of these tests.

Elderly individuals typically have complex healthcare needs, and diagnostic results play a pivotal role in their healthcare management. Errors or inconsistencies in these results can lead to misdiagnoses, inappropriate treatments, and adverse health outcomes, making quality control solutions indispensable. Ensuring the reliability of diagnostic tests becomes not just a matter of healthcare efficiency but a fundamental issue of patient safety and well-being.

Moreover, with advances in healthcare and the ever-increasing reliance on diagnostic technologies, the aging population contributes to the expanding market for in vitro diagnostics quality control. These advanced diagnostic tools offer greater sensitivity, specificity, and automation, which are particularly valuable for elderly patients who may require more intensive monitoring. However, the increased complexity of these technologies can also introduce a higher potential for errors. Quality control materials, software solutions, and protocols help validate and maintain the performance of these advanced diagnostic tools, making them an essential component in delivering quality healthcare to the aging population.

Advancements in Diagnostic Technologies

Advancements in diagnostic technologies are playing a pivotal role in propelling the growth of the Global In Vitro Diagnostics Quality Control Market. Modern diagnostic instruments and methodologies have undergone a rapid transformation, offering unprecedented levels of sensitivity, specificity, and automation. These innovative technologies are revolutionizing healthcare, allowing for quicker and more accurate diagnosis and monitoring of diseases. However, this progress also introduces greater complexity, increasing the potential for errors and inconsistencies in diagnostic results. Quality control measures, such as quality control materials and software solutions, have

become indispensable in ensuring that these cutting-edge diagnostic tools maintain their accuracy and precision.

One of the key drivers behind this trend is the adoption of molecular diagnostics, including PCR-based tests, DNA sequencing, and next-generation sequencing (NGS). These techniques have revolutionized the field of diagnostics by enabling the detection of genetic and molecular markers with remarkable precision. However, the inherent complexity of these methods demands rigorous quality control to validate the results, ensuring that they are reliable and reproducible.

Automation and robotics have also significantly impacted diagnostic laboratories. Automated platforms for sample handling, analysis, and result reporting have not only improved efficiency but have also reduced human error. These systems, however, require stringent quality control to ensure that they consistently deliver accurate and reliable results, maintaining patient safety and trust.

Furthermore, advancements in point-of-care (POC) diagnostic technologies have expanded the reach of diagnostics outside traditional laboratory settings. POC devices, such as portable analyzers and wearable sensors, are becoming more sophisticated, enabling rapid and real-time diagnostic testing. However, as these technologies become more complex and multifunctional, the need for quality control and assurance is heightened to guarantee the precision of results, especially in scenarios where immediate medical decisions are made.

Artificial intelligence (AI) and machine learning have also made their mark on diagnostics. These technologies can enhance the interpretation of diagnostic data, detect patterns and anomalies, and optimize laboratory workflows. Nevertheless, they require rigorous validation and continuous quality control to ensure that AI-driven diagnostics deliver accurate and reliable results, all while reducing the potential for bias or errors.

Key Market Challenges

Regulatory Complexity and Stringency

The Global In Vitro Diagnostics Quality Control Market plays a vital role in ensuring the accuracy and reliability of diagnostic tests, serving as a linchpin in the healthcare system. However, a significant challenge that hampers its growth and effectiveness is the regulatory complexity and stringency that surrounds the in vitro diagnostics (IVD)

industry.

Regulations governing IVD quality control are multifaceted, intricate, and subject to continual evolution. This complexity is primarily rooted in the need to safeguard patient safety by ensuring that diagnostic tests meet rigorous standards of accuracy and reliability. While stringent regulations are undoubtedly essential, they can present a myriad of challenges for manufacturers and stakeholders in the IVD quality control market.

One of the primary issues is the extensive documentation and reporting requirements that regulatory bodies impose on IVD quality control providers. The approval process for new quality control products can be time-consuming and expensive, involving rigorous testing and validation procedures. The stringent compliance measures necessitate substantial resources and expertise, contributing to the overall high cost of quality control solutions.

Furthermore, regulatory variations exist not only between countries but also between different regions within countries. This lack of uniformity complicates the global landscape, making it challenging for manufacturers to develop and maintain quality control solutions that adhere to the specific requirements of various markets. These disparities can result in delays, additional costs, and increased complexities for quality control providers, which in turn impact their ability to serve a global clientele efficiently.

Complexity of Diagnostic Technologies

The Global In Vitro Diagnostics Quality Control Market plays a vital role in ensuring the precision and reliability of diagnostic tests within the clinical laboratory setting. However, it faces a significant challenge posed by the complexity of diagnostic technologies. While diagnostic advancements have revolutionized healthcare, they have simultaneously introduced increased intricacy into the quality control process, which can hinder market growth.

Modern diagnostic technologies encompass a wide array of sophisticated instruments, automation systems, and molecular techniques that offer unparalleled accuracy and specificity. These technologies have empowered healthcare professionals to make more precise diagnoses and monitor diseases more effectively. Nevertheless, the complexity of these advanced diagnostic tools necessitates equally complex quality control measures to ensure they continue to function accurately.

One of the primary challenges associated with these technologies is the development and maintenance of quality control materials and procedures that match their sophistication. Diagnostic methods, such as next-generation sequencing (NGS), PCR-based tests, and genetic assays, rely on unique reagents and calibration standards that must be meticulously formulated and validated. The specialized nature of these materials increases their cost, which can be a financial barrier for smaller laboratories or healthcare facilities.

Automation and robotics are another aspect of the diagnostic complexity challenge. Automated platforms have streamlined the diagnostic process, reduced human error and increasing throughput.

Key Market Trends

Rise of Point-of-Care (POC) Testing

The rise of Point-of-Care (POC) testing is a significant trend that is strongly boosting the Global In Vitro Diagnostics Quality Control Market. POC testing has gained momentum in recent years as it enables rapid, on-site diagnostic assessments, delivering results in real time and often at the patient's bedside. This trend is reshaping the landscape of healthcare delivery, and with it, the demand for specialized quality control solutions that cater to the unique needs of decentralized testing environments.

POC testing offers several advantages, such as reduced turnaround times for results, increased accessibility, and the potential for immediate medical decision-making. However, these benefits come with the inherent challenge of maintaining the accuracy and reliability of diagnostic tests performed outside the controlled environment of a central laboratory.

Quality control is paramount in POC testing to ensure that test results are consistent, precise, and dependable. The stringent requirements for quality control in POC testing are driven by the need to guarantee the accuracy of medical decisions made at the point of care, whether for diagnosing infectious diseases, monitoring chronic conditions, or evaluating the effectiveness of treatments.

To meet these quality control demands, the In Vitro Diagnostics Quality Control Market has adapted by developing a range of products and services tailored to the unique aspects of POC testing. These include specialized quality control materials and software designed to validate the performance of POC devices and maintain the

integrity of testing processes.

The global prevalence of POC testing is expected to continue its ascent, driven by the need for rapid diagnostics, especially in scenarios where immediate medical decisions are crucial, such as emergency departments, ambulances, and remote or resource-limited settings. This growth in POC testing will, in turn, fuel the demand for quality control solutions that can effectively ensure the reliability of these decentralized tests.

Molecular Diagnostics and Genetic Testing

Molecular diagnostics and genetic testing have emerged as powerful drivers behind the growth of the Global In Vitro Diagnostics Quality Control Market. These advanced diagnostic techniques have revolutionized healthcare by offering precise insights into an individual's genetic makeup and disease predisposition, enabling personalized medicine and early disease detection. However, the complexity and precision required by these molecular methods create a significant demand for quality control solutions, thus propelling the quality control market forward.

Molecular diagnostics, which include PCR-based tests, DNA sequencing, and next-generation sequencing (NGS), offer unprecedented levels of sensitivity and specificity in disease detection. These tests rely on the identification of genetic and molecular markers, making them essential for detecting genetic disorders, hereditary conditions, and various diseases such as cancer, infectious diseases, and autoimmune disorders. The intricacy of molecular diagnostics necessitates the use of specialized quality control materials and protocols to validate the accuracy and reliability of these tests.

Genetic testing, a subset of molecular diagnostics, has witnessed a surge in demand due to its capacity to provide valuable genetic information to individuals. From assessing one's risk of hereditary diseases to guiding personalized treatments, genetic testing is a powerful tool. However, the complexity of genetic testing processes requires rigorous quality control practices to ensure that results are accurate and reliable. The development and maintenance of quality control materials specific to genetic testing are essential to meet this growing demand.

Quality control in molecular diagnostics and genetic testing serves the critical role of safeguarding patient safety and the integrity of diagnostic results. Errors or inconsistencies in these tests can lead to misdiagnoses, inappropriate treatments, and adverse health outcomes. Therefore, healthcare professionals, laboratories, and quality control providers are increasingly recognizing the importance of quality control

measures in maintaining the precision and reliability of diagnostic results.

Segmental Insights

Type Insights

Based on the Type, Quality Control emerged as the dominant segment in the global market for Global In Vitro Diagnostics Quality Control Market in 2022. Quality control is fundamentally about ensuring that diagnostic tests are accurate and reliable. In the realm of in vitro diagnostics, where patient care decisions are often made based on the results of these tests, accuracy and reliability are of paramount importance. Quality control measures validate the precision of these tests, making them a non-negotiable component in the diagnostic process. Regulatory bodies worldwide have established stringent quality standards for diagnostic laboratories and manufacturers. Compliance with these regulations is not optional but mandatory. Quality control is a foundational requirement for meeting these standards, and failure to comply can result in severe consequences, including product recalls and legal penalties. This regulatory compliance is a significant driver of demand for quality control in the IVD market.

Application Insights

Based on the Application, Clinical Chemistry emerged as the dominant segment in the global market for Global In Vitro Diagnostics Quality Control Market in 2022. Clinical chemistry is a broad field that encompasses the analysis of various biochemical components in blood, urine, and other bodily fluids. These tests are conducted frequently in clinical laboratories for routine health assessments, disease diagnosis, and monitoring of various conditions. The high frequency of clinical chemistry tests results in a consistent and substantial demand for quality control materials and services. Clinical chemistry tests are often subject to strict regulatory requirements to ensure their accuracy and reliability. Compliance with these regulations is essential for the approval and operation of diagnostic tests, making quality control an integral part of the process. This regulatory framework contributes to the high demand for quality control in clinical chemistry.

Regional Insights

North America emerged as the dominant player in the global In Vitro Diagnostics Quality Control Market in 2022, holding the largest market share. North America boasts a well-developed and advanced healthcare infrastructure, with a high concentration of clinical

laboratories, hospitals, and diagnostic facilities. This infrastructure is equipped with state-of-the-art diagnostic technologies and equipment, which require quality control measures to ensure their accuracy and reliability. The region is a hub for medical innovation and technological advancements. It is home to many leading manufacturers and providers of diagnostic instruments and quality control solutions. These companies continuously invest in research and development to stay at the forefront of diagnostic technology, driving the demand for quality control materials and services.

Key Market Players

F. Hoffmann-La Roche Ltd

Alere, Inc.

Abbott Laboratories Inc.

Hologic, Inc. (Gen-Probe)

Qiagen N.V.

Bio-Rad Laboratories, Inc.

Quidel Corp.

bioMerieux, Inc.

Sysmex Corporation

Thermo Fisher Scientific, Inc.

Report Scope:

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

Global In Vitro Diagnostics Quality Control Market, By Type:

Quality Controls

Data Management Solutions

Quality Assurance Services

Global In Vitro Diagnostics Quality Control Market, By Application:

Immunoassay

Hematology

Clinical Chemistry

Molecular Diagnostics

Coagulation

Microbiology

Others

Global In Vitro Diagnostics Quality Control Market, By End-use:

Hospitals & Clinics

Ambulatory Surgical Centers

Others

Global In Vitro Diagnostics Quality Control 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 In Vitro Diagnostics Quality Control Market.

Available Customizations:

Global In Vitro Diagnostics Quality Control 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. GLOBAL IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Type (Quality Controls, Data Management Solutions, Quality Assurance Services)
 - 4.2.2. By Application (Immunoassay, Hematology, Clinical Chemistry, Molecular Diagnostics, Coagulation, Microbiology, Others)
 - 4.2.3. By End-use (Hospitals & Clinics, Ambulatory Surgical Centers, Others)
 - 4.2.4. By Region

4.2.5. By Company (2022)

4.3. Market Map

4.3.1. By Type

4.3.2. By Application

4.3.3. By End-use

4.3.4. By Region

5. ASIA PACIFIC IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Type

5.2.2. By Application

5.2.3. By End-use

5.2.4. By Country

5.3. Asia Pacific: Country Analysis

5.3.1. China In Vitro Diagnostics Quality Control Market Outlook

5.3.1.1. Market Size & Forecast

5.3.1.1.1. By Value

5.3.1.2. Market Share & Forecast

5.3.1.2.1. By Type

5.3.1.2.2. By Application

5.3.1.2.3. By End-use

5.3.2. India In Vitro Diagnostics Quality Control Market Outlook

5.3.2.1. Market Size & Forecast

5.3.2.1.1. By Value

5.3.2.2. Market Share & Forecast

5.3.2.2.1. By Type

5.3.2.2.2. By Application

5.3.2.2.3. By End-use

5.3.3. Australia In Vitro Diagnostics Quality Control Market Outlook

5.3.3.1. Market Size & Forecast

5.3.3.1.1. By Value

5.3.3.2. Market Share & Forecast

5.3.3.2.1. By Type

5.3.3.2.2. By Application

5.3.3.2.3. By End-use

5.3.4. Japan In Vitro Diagnostics Quality Control Market Outlook

5.3.4.1. Market Size & Forecast

5.3.4.1.1. By Value

5.3.4.2. Market Share & Forecast

5.3.4.2.1. By Type

5.3.4.2.2. By Application

5.3.4.2.3. By End-use

5.3.5. South Korea In Vitro Diagnostics Quality Control Market Outlook

5.3.5.1. Market Size & Forecast

5.3.5.1.1. By Value

5.3.5.2. Market Share & Forecast

5.3.5.2.1. By Type

5.3.5.2.2. By Application

5.3.5.2.3. By End-use

6. EUROPE IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Type

6.2.2. By Application

6.2.3. By End-use

6.2.4. By Country

6.3. Europe: Country Analysis

6.3.1. France In Vitro Diagnostics Quality Control 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 Type

6.3.1.2.2. By Application

6.3.1.2.3. By End-use

6.3.2. Germany In Vitro Diagnostics Quality Control 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 Type

6.3.2.2.2. By Application

6.3.2.2.3. By End-use

6.3.3. Spain In Vitro Diagnostics Quality Control 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 Type

6.3.3.2.2. By Application

6.3.3.2.3. By End-use

6.3.4. Italy In Vitro Diagnostics Quality Control Market Outlook

6.3.4.1. Market Size & Forecast

6.3.4.1.1. By Value

6.3.4.2. Market Share & Forecast

6.3.4.2.1. By Type

6.3.4.2.2. By Application

6.3.4.2.3. By End-use

6.3.5. United Kingdom In Vitro Diagnostics Quality Control Market Outlook

6.3.5.1. Market Size & Forecast

6.3.5.1.1. By Value

6.3.5.2. Market Share & Forecast

6.3.5.2.1. By Type

6.3.5.2.2. By Application

6.3.5.2.3. By End-use

7. NORTH AMERICA IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Type

7.2.2. By Application

7.2.3. By End-use

7.2.4. By Country

7.3. North America: Country Analysis

7.3.1. United States In Vitro Diagnostics Quality Control 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 Type

7.3.1.2.2. By Application

- 7.3.1.2.3. By End-use
- 7.3.2. Mexico In Vitro Diagnostics Quality Control 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 Type
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By End-use
- 7.3.3. Canada In Vitro Diagnostics Quality Control 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 Type
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By End-use

8. SOUTH AMERICA IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Application
 - 8.2.3. By End-use
 - 8.2.4. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil In Vitro Diagnostics Quality Control 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 Type
 - 8.3.1.2.2. By Application
 - 8.3.1.2.3. By End-use
 - 8.3.2. Argentina In Vitro Diagnostics Quality Control 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 Type

- 8.3.2.2.2. By Application
- 8.3.2.2.3. By End-use
- 8.3.3. Colombia In Vitro Diagnostics Quality Control 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 Type
 - 8.3.3.2.2. By Application
 - 8.3.3.2.3. By End-use

9. MIDDLE EAST AND AFRICA IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Application
 - 9.2.3. By End-use
 - 9.2.4. By Country
- 9.3. MEA: Country Analysis
 - 9.3.1. South Africa In Vitro Diagnostics Quality Control 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 Type
 - 9.3.1.2.2. By Application
 - 9.3.1.2.3. By End-use
 - 9.3.2. Saudi Arabia In Vitro Diagnostics Quality Control 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 Type
 - 9.3.2.2.2. By Application
 - 9.3.2.2.3. By End-use
 - 9.3.3. UAE In Vitro Diagnostics Quality Control 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 Type
- 9.3.3.2.2. By Application
- 9.3.3.2.3. By End-use

10. MARKET DYNAMICS

- 10.1. Drivers
- 10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Developments
- 11.2. Product Launches
- 11.3. Mergers & Acquisitions

12. GLOBAL IN VITRO DIAGNOSTICS QUALITY CONTROL MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Product

14. COMPETITIVE LANDSCAPE

- 14.1. F. Hoffmann-La Roche Ltd.
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Financials (In case of listed)
 - 14.1.5. Recent Developments
 - 14.1.6. SWOT Analysis
- 14.2. Alere, Inc.
- 14.3. Abbott Laboratories Inc.
- 14.4. Hologic, Inc. (Gen-Probe)

- 14.5. Qiagen N.V.
- 14.6. Bio-Rad Laboratories, Inc.
- 14.7. Quidel Corp.
- 14.8. bioMerieux, Inc.
- 14.9. Sysmex Corporation
- 14.10. Thermo Fisher Scientific, Inc.

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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