

Neglected Tropical Diseases Diagnosis Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Disease (Dengue, Chikungunya, Rabies, Buruli Ulcer, Yaws, Lymphatic Filariasis, Taeniasis/Cysticercosis, Dracunculiasis, others), By Diagnostic Method (Conventional, Molecular/Modern), By Service Type (Centralized Service, POC Service), By End Use (Clinical Labs, Hospital & Clinics, Home Healthcare), by region, and Competition

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Abstracts

Global Neglected Tropical Diseases Diagnosis Market has valued at USD 6.20 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 4.09% through 2028. Neglected Tropical Diseases (NTDs) refer to a group of infectious diseases that primarily affect populations in low-income and tropical or subtropical regions of the world. These diseases are characterized by their prevalence in marginalized and impoverished communities, often lacking access to adequate healthcare, clean water, sanitation, and preventive measures. NTDs disproportionately affect the world's poorest and most marginalized populations, particularly those living in rural or urban slum areas. These communities often lack access to basic healthcare services. NTDs are caused by a variety of infectious agents, including bacteria, viruses, parasites, and protozoa. The transmission of these diseases is often linked to environmental factors and vectors, such as mosquitoes or flies. NTD advocacy groups and awareness campaigns have played a significant role in increasing public and political awareness about these diseases. This has resulted in greater support for

diagnosis and treatment efforts.

Global health organizations and initiatives, such as the World Health Organization (WHO), the World Bank, and the Global Fund, have prioritized the control and elimination of NTDs. Their support and funding drive research and diagnostic efforts. Growing awareness of NTDs has led to increased funding from governments, philanthropic organizations, and private sector entities. This financial support fuels research and development in diagnostics. Ongoing research in molecular biology, immunology, and diagnostics technology has led to the development of innovative and more accurate diagnostic tests for NTDs. Technological advancements, such as molecular diagnostics, point-of-care testing, and telemedicine, are driving improvements in NTDs diagnosis. These technologies enhance the accuracy and accessibility of diagnostic tools. The pharmaceutical industry's involvement in NTDs diagnosis is increasing, with more companies developing diagnostic tools and contributing to research and development efforts.

Key Market Drivers

Advancements in Diagnostics

Molecular techniques such as Polymerase Chain Reaction (PCR) and Nucleic Acid Amplification Tests (NAATs) have revolutionized NTDs diagnosis. They allow for the detection of the genetic material of pathogens with high sensitivity and specificity. Molecular diagnostics are particularly useful for diseases like Chagas disease and Leishmaniasis. Point-of-Care Testing (POCT) devices have been developed for various NTDs, enabling rapid and on-site diagnosis. These portable devices are especially valuable in remote and resource-limited settings where access to centralized laboratories is limited. Examples include rapid diagnostic tests for malaria and dengue. Serological tests detect specific antibodies produced by the immune system in response to infection. Advances in serological assays have improved their accuracy and made them more widely available for diagnosing diseases like schistosomiasis and lymphatic filariasis. Some NTDs can be diagnosed by detecting specific antigens produced by the pathogens. Antigen detection tests are valuable for diseases like African sleeping sickness and urinary schistosomiasis.

The use of telemedicine and mobile health applications has expanded access to NTDs diagnosis. Healthcare workers can capture images of symptoms, which are then sent to experts for remote diagnosis and consultation. Multiplex assays allow for the simultaneous detection of multiple pathogens or disease markers in a single test. These

assays are cost-effective and efficient for screening and surveillance programs targeting several NTDs simultaneously. Advances in biotechnology have led to the development of novel diagnostic platforms and biomarkers, such as microarrays and biosensors, which can enhance the accuracy and speed of NTDs diagnosis. Data analytics and artificial intelligence are being employed to analyze large datasets related to NTDs. These technologies can assist in identifying disease patterns, tracking outbreaks, and predicting disease spread. Innovations in sample collection and preservation techniques help ensure the integrity of specimens, particularly in resource-limited settings where sample transportation may be challenging. Collaborations between governments, non-governmental organizations (NGOs), and the private sector have accelerated the development and deployment of advanced diagnostic tools for NTDs. This factor will help in the development of the Global Neglected Tropical Diseases Diagnosis Market.

Increasing Pharmaceutical Industry Engagement

Pharmaceutical companies often invest in research and development efforts to discover and develop drugs and vaccines for NTDs. To develop effective treatments, accurate and early diagnosis is essential to identify the target population for clinical trials and monitor treatment efficacy. This drives the demand for advanced diagnostic tools and technologies. In some cases, pharmaceutical companies develop companion diagnostics alongside new drugs or vaccines. These diagnostics are designed to identify specific biomarkers or patient profiles that indicate the suitability of the drug or vaccine for an individual patient. This approach not only enhances patient care but also creates a demand for specialized diagnostic tests. Clinical trials for new NTDs treatments require rigorous diagnosis and monitoring of study participants to assess the safety and efficacy of experimental interventions. Pharmaceutical companies work closely with diagnostic providers to ensure accurate and standardized diagnostic procedures in these trials. Many pharmaceutical companies are focusing on developing targeted therapies for NTDs, which require precise diagnosis to identify patients who will benefit most from these therapies. This targeted approach necessitates the development and use of specific diagnostic tests.

To gain regulatory approval for their NTDs treatments, pharmaceutical companies must demonstrate the safety and efficacy of their products. Reliable diagnostic tools are essential for patient selection, monitoring treatment outcomes, and complying with regulatory requirements. Pharmaceutical companies often collaborate with global health organizations, governments, and NGOs to address NTDs. These partnerships may involve efforts to improve diagnosis, access to treatment, and overall disease management. Pharmaceutical companies contribute to the supply chain and distribution

of NTDs diagnostic tests and treatments, ensuring that they reach affected populations in a timely manner. Pharmaceutical companies can leverage their resources and influence to raise awareness about NTDs and the importance of early diagnosis, which, in turn, drives demand for diagnostic tools. The engagement of pharmaceutical companies in the NTDs sector contributes to the sustainability of the market for diagnostic tests. Their involvement can stimulate innovation, competition, and increased accessibility to diagnostic solutions. Pharmaceutical companies may support capacity-building efforts, including training healthcare professionals in NTDs diagnosis and management, which enhances the overall healthcare infrastructure in regions affected by NTDs. This factor will pace up the demand of the Global Neglected Tropical Diseases Diagnosis Market.

Rising Global Health Initiatives

Global health initiatives often allocate significant funds to support NTDs control and elimination programs. These funds are used to procure diagnostic tools, establish diagnostic laboratories, and train healthcare workers in affected regions, thereby increasing the demand for diagnostic products and services. These initiatives engage in advocacy efforts to raise awareness about the burden of NTDs and the importance of early diagnosis. Increased awareness not only encourages individuals to seek diagnosis but also prompts governments and healthcare organizations to invest in diagnostic infrastructure. Global health initiatives may provide funding and support for research and development efforts related to NTDs diagnosis. This can lead to the creation of more accurate, affordable, and accessible diagnostic tools tailored to the needs of affected populations. Initiatives often focus on strengthening healthcare systems in endemic regions. This includes building the capacity of healthcare workers to diagnose and manage NTDs, which generates demand for diagnostic training programs and tools. To track progress toward NTDs control and elimination goals, global health initiatives emphasize the importance of robust surveillance systems. These systems rely on accurate diagnostic data and drive the need for improved diagnostic capabilities.

Global health initiatives facilitate partnerships between governments, non-governmental organizations (NGOs), pharmaceutical companies, and diagnostic providers. These collaborations can lead to the development and deployment of innovative diagnostic solutions. Early and accurate diagnosis is a prerequisite for accessing treatment for NTDs. Initiatives that aim to increase treatment coverage, such as mass drug administration campaigns, rely on diagnostic tools to identify affected individuals. Global health initiatives collect and analyze data related to NTDs diagnosis and treatment. This data is used to make informed decisions, allocate resources, and measure progress

toward NTDs control and elimination targets. Initiatives often advocate for the integration of NTDs diagnosis into existing healthcare systems, ensuring sustainability and continued demand for diagnostic services even after the initiatives conclude. In the event of disease outbreaks or public health emergencies related to NTDs, global health initiatives may provide rapid support for diagnosis and containment efforts, driving immediate demand for diagnostics. Global health initiatives are often supported by donors and philanthropic organizations that share their commitment to addressing NTDs. Donor funding contributes to the availability of diagnostic tools and services. This factor will accelerate the demand of the Global Neglected Tropical Diseases Diagnosis Market.

Key Market Challenges

Lack of Sensitive and Specific Tests

Many NTDs share symptoms with other diseases or have multiple stages, making accurate diagnosis difficult. When sensitive and specific tests are lacking, there's a higher risk of misdiagnosis or underdiagnosis, leading to delayed or inadequate treatment. Accurate diagnosis is essential for determining the appropriate treatment regimen. Without sensitive and specific tests, healthcare providers may resort to empirical treatment, which can result in unnecessary healthcare costs and potential drug resistance. NTDs control and elimination programs rely on accurate data to target affected populations effectively. Inaccurate diagnosis can lead to misallocation of resources, potentially slowing down progress in controlling these diseases. For tracking the prevalence and distribution of NTDs, sensitive and specific tests are crucial. Inaccurate diagnostic tools can lead to inaccurate disease surveillance data, hindering the ability to detect outbreaks or changes in disease patterns. Diagnostic tools are fundamental in research efforts related to NTDs, including drug and vaccine development. Insensitive or nonspecific tests can slow down the research process and hinder the identification of potential therapeutic targets. Patients may undergo multiple tests, sometimes invasive, to confirm an NTD diagnosis due to the lack of definitive tests. This can result in a physical and psychological burden on affected individuals. Limited healthcare resources in endemic regions should be used efficiently. Sensitive and specific tests are essential for targeting interventions to those who need them most, thereby optimizing resource allocation.

Resource Constraints

NTDs often affect populations in low-income and resource-limited regions. The

availability of financial resources for healthcare infrastructure, research and development, and diagnostic programs may be insufficient to meet the growing demand for diagnostic tools. Resource-limited settings may lack adequate healthcare infrastructure, including laboratories and diagnostic facilities. Building and maintaining such infrastructure can be costly and challenging. Diagnosing NTDs effectively requires skilled healthcare workers, laboratory technicians, and pathologists. Resource constraints can limit the availability of trained personnel. Modern diagnostic equipment and technologies can be expensive to procure and maintain. Resource-limited regions may struggle to acquire and sustain advanced diagnostic equipment. Resource constraints can lead to supply chain disruptions, affecting the availability of diagnostic reagents, consumables, and equipment. This can result in delays and shortages. Ensuring the accuracy and reliability of diagnostic tests requires access to quality control procedures and materials, which may be limited in resource-constrained settings. Developing new and improved diagnostic tests for NTDs demands research and innovation, which can be hampered by a lack of research funding and infrastructure.

Key Market Trends

Focus on Early Detection

Early detection allows for prompt initiation of treatment, which can lead to better outcomes for patients. For many NTDs, early treatment can prevent disease progression and complications. Early diagnosis and treatment can help break the cycle of transmission of NTDs. By identifying and treating infected individuals early, there is a reduced risk of spreading the disease to others through vectors or direct contact. Some NTDs, such as lymphatic filariasis and leprosy, can cause disabling conditions if not treated early. Early detection and intervention can prevent or reduce disability and improve the quality of life for affected individuals. Early detection can be cost-effective in the long run. It reduces the need for more extensive and expensive treatments that may be required if NTDs are diagnosed at a later stage. Timely diagnosis contributes to the success of NTDs control and elimination programs. Early detection allows for more targeted and efficient interventions, which can accelerate progress toward achieving disease control goals. Some NTDs are associated with social stigma and discrimination. Early diagnosis and treatment can help individuals avoid the social consequences of living with untreated NTDs. Advances in point-of-care diagnostic technologies make it possible to diagnose NTDs quickly and accurately in resource-limited settings, enabling immediate treatment and reducing the need for follow-up visits.

Segmental Insights

Disease Insights

In 2022, the Global Neglected Tropical Diseases Diagnosis Market Dracunculiasis segment is the fastest growing and is predicted to continue expanding over the coming years. The most characteristic symptom of Dracunculiasis is the emergence of the adult female worm through a painful blister on the skin, usually on the lower limbs. This blister causes intense pain and a burning sensation. The worm slowly emerges from the blister over the course of several days to weeks. While Guinea worm disease is not typically fatal, it can lead to secondary bacterial infections when the emerging worm ulcerates the skin. These infections can cause pain, discomfort, and disability. The primary method for preventing Dracunculiasis is by providing access to safe drinking water sources and educating communities about the importance of not drinking water from stagnant sources that may be contaminated with copepods.

Diagnostics Method Insights

In 2022, the Global Neglected Tropical Diseases Diagnosis Market largest share was held by molecular/modern diagnostic segment and is predicted to continue expanding over the coming years. Molecular diagnostic techniques, such as polymerase chain reaction (PCR) and nucleic acid amplification tests (NAATs), offer high sensitivity and specificity in detecting the genetic material of pathogens responsible for NTDs. This accuracy is crucial for reliable diagnosis. Molecular diagnostics can detect infections at an early stage, even before symptoms manifest. Early detection is essential for effective treatment and disease control. Modern diagnostic platforms can simultaneously test for multiple NTDs, offering a cost-effective and efficient way to screen for a range of diseases in a single assay. Advancements in molecular diagnostics have led to the development of portable and point-of-care devices, which can be used in resource-limited settings, closer to the patient. This improves access to NTD diagnosis. Molecular techniques can provide detailed information about the genotype or strain of the pathogen, which is important for epidemiological studies and tracking disease transmission.

Service Type Insights

In 2022, the Global Neglected Tropical Diseases Diagnosis Market largest share was held by Centralized service segment and is predicted to continue expanding over the coming years. Centralized service providers often have specialized expertise in

diagnosing NTDs. They may employ healthcare professionals and laboratory technicians who are trained and experienced in handling NTD diagnostic tests. Centralized service providers typically have access to advanced diagnostic equipment and technologies, allowing them to perform high-quality and accurate diagnostic tests for NTDs. Centralized service providers often offer a comprehensive range of tests for various NTDs, providing healthcare providers with a one-stop solution for diagnosing multiple diseases. These providers typically have well-equipped facilities, including state-of-the-art laboratories, which are essential for performing the complex diagnostic tests required for NTDs.

End-Use Insights

In 2022, the Global Neglected Tropical Diseases Diagnosis Market largest share was held by Clinical laboratory segment in the forecast period and is predicted to continue expanding over the coming years. Diagnosing neglected tropical diseases often requires specialized laboratory tests that can detect the presence of parasites, antibodies, or specific antigens. Clinical laboratories are well-equipped to perform these complex tests accurately. Clinical laboratories are known for their ability to provide precise and reliable diagnostic results, which is crucial in diagnosing NTDs correctly. Many NTDs have similar symptoms to other diseases, so accurate diagnosis is essential. Clinical laboratories typically employ trained professionals, including medical technologists and pathologists, who have the expertise to handle and interpret NTD diagnostic tests. Clinical laboratories have access to advanced diagnostic equipment and technologies, such as molecular diagnostics and serological assays, which are essential for detecting NTDs accurately. Proper handling and processing of patient samples are critical for NTD diagnosis. Clinical laboratories have established protocols for handling various types of biological specimens.'

Regional Insights

The North America region dominates the Global Neglected Tropical Diseases Diagnosis Market in 2022. North America is home to many leading pharmaceutical companies, research institutions, and academic centers that are actively involved in the development of diagnostic tools and treatments for NTDs. These organizations often contribute to global efforts in combating NTDs through research and innovation. Some North American governments and foundations provide substantial funding for global health initiatives and NTDs research. Organizations like the Bill & Melinda Gates Foundation, based in the United States, have been instrumental in supporting efforts to combat NTDs worldwide.

Key Market Players

F. Hoffmann-La Roche Ltd

Abbott

Thermo Fisher Scientific Inc.

ZeptoMetrix

InBios International, Inc.

DiaSys Diagnostics Systems GmbH

Genome Diagnostics Pvt. Ltd.

Omega Diagnostics Group Plc

Oscar Medicare Pvt Ltd.

Coris BioConcept

Report Scope:

In this report, the Global Neglected Tropical Diseases Diagnosis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Neglected Tropical Diseases Diagnosis Market, By Disease:

Dengue

Chikungunya

Rabies

Buruli Ulcer

Yaws

Lymphatic Filariasis

Taeniasis/Cysticercosis

Dracunculiasis

Others

Neglected Tropical Diseases Diagnosis Market, By Diagnostic Method:

Conventional

Molecular/Modern

Neglected Tropical Diseases Diagnosis Market, By Service Type:

Centralized Service

POC Service

Neglected Tropical Diseases Diagnosis Market, By End-Use:

Clinical Labs

Hospital/Clinics

Home Healthcare

Global Neglected Tropical Diseases Diagnosis 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 Neglected Tropical Diseases Diagnosis Market.

Available Customizations:

Global Neglected Tropical Diseases Diagnosis 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).

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17. STRATEGIC RECOMMENDATIONS

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