

# **Respiratory Syncytial Virus Diagnostics Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2019-2029 Segmented By Product (Direct Fluorescent Antibody (DFA) Method, Rapid Antigen Diagnostic Test (RADT), Molecular Diagnostics, Chromatographic Immunoassay, Diagnostic Imaging, Gel Microdroplets, Flow Cytometry, Others), By End-User (Hospitals & Clinics, Laboratory, Homecare), By Region, Competition**

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## **Abstracts**

Global Respiratory Syncytial Virus Diagnostics Market was valued at USD 942.88 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 9.69% through 2029. The Global Respiratory Syncytial Virus (RSV) Diagnostics Market is a dynamic and essential component of the broader healthcare industry. This market focuses on the development, production, and distribution of diagnostic tools and services for the detection of RSV, a common respiratory virus responsible for a range of illnesses, from mild cold-like symptoms to severe lower respiratory tract infections.

The market encompasses a wide range of diagnostic methods for RSV, reflecting the need for diverse approaches in different healthcare settings. These methods include molecular diagnostics (e.g., PCR), rapid antigen tests, chromatographic immunoassays, viral culture, and serological assays. Each method has its strengths and applications, contributing to the overall diversity of the market.

## **Key Market Drivers**

## Increasing RSV Incidence

The increasing incidence of Respiratory Syncytial Virus (RSV) infections is a crucial market driver for the growth of the Global RSV Diagnostics Market. This driver is driven by several factors and has a significant impact on the demand for RSV diagnostic tools and services. RSV is one of the most common respiratory viruses, and it affects individuals of all age groups. However, it poses a more severe risk to infants, the elderly, and individuals with weakened immune systems. Epidemiological data reveals a rising trend in RSV infections globally. The increasing incidence is primarily due to factors such as a growing global population, urbanization, and changes in demographics.

RSV is a leading cause of lower respiratory tract infections in young children. As birth rates remain steady or increase in many regions, the number of vulnerable infants at risk of RSV infections also rises. Severe RSV infections in infants often result in hospitalizations, placing a substantial burden on healthcare systems. This has driven the demand for accurate and early diagnostics to identify RSV in children, as timely intervention can significantly reduce the severity of the disease.

In addition to infants, the elderly are also highly susceptible to severe RSV infections. With populations in many parts of the world experiencing an increase in the proportion of elderly individuals, there is a higher prevalence of RSV in this age group. RSV outbreaks in nursing homes and long-term care facilities have become a significant concern. Therefore, diagnostic tools are essential to identify RSV in elderly patients quickly. Individuals with compromised immune systems, such as those undergoing cancer treatment or organ transplantation, are at higher risk of severe RSV infections. The rise in the number of people with immunosuppressive conditions due to medical advancements and increased survival rates among these patients has led to a growing incidence of RSV infections in this specific group.

## Advancements in Diagnostic Technologies

Advancements in diagnostic technologies have played a pivotal role in driving the growth of the Global Respiratory Syncytial Virus (RSV) Diagnostics Market. These innovations have improved the accuracy, speed, and efficiency of RSV testing, making it easier for healthcare professionals to diagnose RSV infections. The most significant advancements in RSV diagnostics has been the widespread adoption of molecular techniques, particularly Polymerase Chain Reaction (PCR) and nucleic acid

amplification assays. These methods allow for the detection of RSV-specific genetic material in clinical samples with a high degree of sensitivity and specificity. PCR-based tests can differentiate between RSV subtypes, providing valuable information for patient management and epidemiological studies.

Rapid antigen tests for RSV have become increasingly sophisticated and accurate. These tests are user-friendly and provide quick results, making them suitable for point-of-care settings. Advances in rapid antigen test technology have improved their sensitivity and specificity, reducing the likelihood of false negatives and positives. This has expanded their use in healthcare facilities, aiding in timely RSV diagnosis. Automated diagnostic platforms and high-throughput systems have enhanced the efficiency of RSV testing. These technologies allow laboratories to process a large number of samples simultaneously, significantly reducing turnaround times. Throughput and automation enable healthcare providers to diagnose RSV in a more timely and cost-effective manner, which is especially critical during peak RSV seasons.

Multiplex diagnostic assays can simultaneously test for multiple respiratory pathogens, including RSV, influenza, and other common viruses. These assays are highly efficient, reducing the time and resources required to diagnose various respiratory infections. By offering comprehensive respiratory panels, they enhance the diagnostic capabilities of healthcare facilities, particularly during the flu season when multiple viruses may be circulating simultaneously. The development of RSV POCT devices has been a game-changer in diagnostic technology. These compact and portable instruments allow for RSV testing at the patient's bedside, emergency rooms, or outpatient clinics. They provide rapid results, enabling healthcare professionals to make immediate clinical decisions. The convenience and speed of POCT devices have expanded their use in both developed and developing regions.

### Growing Awareness and Screening Programs

The growing awareness and implementation of screening programs for Respiratory Syncytial Virus (RSV) are vital market drivers for the growth of the Global RSV Diagnostics Market. These programs play a crucial role in detecting RSV infections early, particularly in vulnerable populations like infants and the elderly. Governments and healthcare organizations worldwide have recognized the significant health and economic burden associated with RSV infections, especially in pediatric and elderly populations. As a result, they have launched public health campaigns to raise awareness about RSV and the importance of early diagnosis. These campaigns educate healthcare professionals, parents, and caregivers about the symptoms of RSV

and the need for timely testing and treatment, thereby driving the demand for RSV diagnostics.

In many regions, RSV infections tend to follow a seasonal pattern, with peak seasons typically occurring in the colder months. Awareness campaigns and screening programs are often timed to coincide with these peak seasons. This proactive approach helps healthcare providers prepare for the surge in RSV cases, encouraging the use of diagnostic tests to quickly identify and manage RSV infections. RSV infections in infants can be severe and life-threatening. Therefore, many countries have implemented screening programs for RSV in neonatal and pediatric wards. These programs involve regular testing of infants with respiratory symptoms, as well as those born prematurely or with underlying health conditions. By identifying RSV early, healthcare professionals can initiate appropriate interventions, reducing the severity of the disease and preventing its spread.

Awareness and screening initiatives extend to elderly care facilities, such as nursing homes and long-term care centers. These settings often see outbreaks of RSV, which can be particularly dangerous for older adults. Routine testing and surveillance help in early detection and isolation of infected individuals, preventing widespread outbreaks and ensuring that appropriate care is provided. Increased awareness and screening programs have attracted the attention of pharmaceutical and biotechnology companies. As a result, there has been growing investment in the development of RSV diagnostics, including rapid tests and advanced molecular assays. These companies recognize the demand for accurate and timely testing in the healthcare system, further fueling market growth.

### Rising Healthcare Expenditure

The rising healthcare expenditure is a significant market driver for the growth of the Global Respiratory Syncytial Virus (RSV) Diagnostics Market. Healthcare expenditure encompasses both public and private spending on healthcare services and products, including diagnostic testing. As healthcare expenditure increases, healthcare systems and providers are more inclined to invest in state-of-the-art diagnostic technologies. This includes the acquisition of advanced RSV diagnostic equipment, such as automated PCR machines, high-throughput platforms, and point-of-care testing devices. These investments enhance the diagnostic capabilities and efficiency of healthcare facilities, promoting the growth of the RSV diagnostics market.

Higher healthcare spending enables healthcare systems to expand access to diagnostic

testing services. This means that a greater number of patients can benefit from RSV diagnostics, leading to increased testing volumes and a larger market for RSV diagnostic products. This increased access to diagnostics is crucial for timely identification of RSV cases, especially in vulnerable populations. A significant portion of healthcare expenditure goes towards research and development in the healthcare sector. This funding supports the development of new and improved diagnostic technologies and tests for RSV. Research institutions, pharmaceutical companies, and diagnostic manufacturers receive financial support to innovate and enhance RSV diagnostics, further stimulating the market's growth.

The availability of resources due to rising healthcare expenditure fosters market competition and innovation. Diagnostic companies are motivated to create better and more cost-effective RSV diagnostic solutions. This results in a continuous cycle of research and development, with companies striving to outperform their competitors by offering more accurate, faster, and user-friendly diagnostic tools. With increased healthcare spending, governments and employers often expand health insurance coverage for their populations and employees. This includes coverage for diagnostic tests, which reduces financial barriers for individuals seeking RSV diagnostics. Improved insurance coverage encourages more individuals to undergo RSV testing, further fueling market growth.

### Key Market Challenges

#### Regulatory Hurdles

Regulatory approvals and compliance requirements can significantly impede the introduction and adoption of new RSV diagnostic products. Developing and marketing diagnostic tests often involves rigorous and time-consuming regulatory processes. Ensuring that products meet international standards and gain approvals from various health authorities can be a lengthy and expensive process. Regulatory hurdles can delay product launches and increase development costs, slowing market growth. Companies must navigate these challenges to bring their RSV diagnostics to the market effectively.

#### Cost Constraints

The cost of RSV diagnostic tests can be a barrier to adoption, especially in resource-constrained healthcare settings. The high cost of molecular diagnostic methods, such as PCR, can limit access to accurate RSV testing, particularly in low- and middle-

income countries. Reducing the cost of RSV diagnostics, while maintaining quality and accuracy, is a significant challenge. Competitive pricing and cost-effective technologies are necessary to address this challenge and ensure broader market penetration.

### Competitive Landscape

The RSV diagnostics market is competitive, with several established companies and new entrants vying for market share. Competition can lead to pricing pressure and reduced profit margins. This, in turn, may limit the resources available for research and development. To stay ahead, companies must continuously innovate and differentiate their products, which can be challenging, as well as costly.

### Key Market Trends

#### Rise in Point-of-Care Testing (POCT)

Point-of-care testing has become a dominant trend in the RSV diagnostics market. POCT devices are designed to provide rapid and accurate RSV test results at or near the patient's bedside. This trend is driven by the need for timely diagnosis, especially in infants and the elderly, where early intervention is crucial. The availability of user-friendly, portable, and cost-effective RSV POCT devices has expanded access to diagnostics, enabling healthcare professionals to make immediate clinical decisions. The growth of POCT has been instrumental in reducing the burden of RSV-related illnesses and improving patient care.

#### Multiplex Diagnostics

Multiplex diagnostic assays, which can simultaneously detect multiple respiratory pathogens, have gained prominence in the RSV diagnostics market. These assays can identify RSV along with other common respiratory viruses, such as influenza and rhinovirus. The advantage of multiplex diagnostics is the efficiency and cost-effectiveness they offer in diagnosing various respiratory infections with a single test. Healthcare providers benefit from quicker and more comprehensive results, while patients experience reduced discomfort and shorter wait times. This trend supports the move toward more integrated respiratory panels and further streamlines diagnostic workflows.

#### Digital Health Integration

The integration of digital health technologies and electronic medical records has become a significant trend in the RSV diagnostics market. This integration facilitates data management, result sharing, and real-time monitoring. It allows healthcare professionals to quickly access patient test results and make informed decisions. Patients also benefit from improved communication and follow-up care. Telemedicine services have further expanded the reach of RSV diagnostics, enabling remote consultations and test result sharing, particularly in underserved areas. This trend is critical for enhancing patient care, especially during the ongoing digital health revolution.

## Segmental Insights

### Product Insights

Based on the category of Product, the Chromatographic Immunoassay segment emerged as the dominant player in the global market for Respiratory Syncytial Virus Diagnostics in 2023. Chromatographic immunoassays are known for their rapid results and ease of use. These tests typically yield results within 15-20 minutes, making them highly suitable for point-of-care and emergency settings. The simplicity of these tests allows healthcare professionals to quickly diagnose RSV infections, especially in infants and young children where timely intervention is critical. Chromatographic immunoassays have advanced significantly in terms of sensitivity and specificity. They can detect RSV antigens or antibodies with a high degree of accuracy. This ensures that RSV infections are correctly identified, reducing the likelihood of false negatives or false positives.

Chromatographic immunoassays are particularly well-suited for point-of-care testing. The ease of use and quick turnaround time make them ideal for testing in various healthcare settings, including clinics, emergency rooms, and outpatient facilities. POCT devices have played a crucial role in decentralizing RSV diagnostics and expanding access to timely testing. The cost-effectiveness of chromatographic immunoassays is a significant factor in their dominance. These tests are relatively affordable compared to more complex diagnostic methods like PCR. The lower cost makes them accessible to a broader range of healthcare providers and facilities, both in developed and developing regions. These factors are expected to drive the growth of this segment.

### End-User Insights

The hospital segment is projected to experience rapid growth during the forecast period. Hospitals are primary centers for comprehensive patient care. They serve a diverse

patient population, including infants, children, adults, and the elderly, all of whom can be susceptible to RSV infections. Hospitals are equipped to address a wide range of healthcare needs, including respiratory illnesses, making them significant users of RSV diagnostic tests to identify and manage RSV cases across age groups. Hospitals often see a high volume of patients, particularly during the RSV season. RSV infections can lead to severe respiratory symptoms, which can result in hospitalization, especially in infants and individuals with underlying health conditions. The demand for RSV diagnostics in hospitals is substantial, given the number of patients seeking care for these infections. Hospitals typically have well-established laboratory facilities and skilled personnel to conduct diagnostic tests. This infrastructure enables them to perform a wide range of diagnostic procedures, including RSV testing. Hospitals can efficiently process large numbers of RSV diagnostic tests, offering quicker results to patients and healthcare providers. Many hospitals have specialized units, such as neonatal intensive care units (NICUs) and pediatric wards, where infants and young children with severe RSV infections are treated. The need for timely and accurate RSV testing in these units is critical, as early diagnosis can significantly impact patient outcomes. Hospitals with specialized units place a strong emphasis on RSV diagnostics. These factors collectively contribute to the growth of this segment.

## Regional Insights

North America emerged as the dominant player in the global Respiratory Syncytial Virus Diagnostics market in 2023, holding the largest market share in terms of value. The growing prevalence of respiratory infections in the region, coupled with a rising infant population, has significantly impacted the demand for diagnostic solutions. Within the region, molecular diagnostics and chromatographic immunoassays have emerged as the preferred diagnostic products due to their superior accuracy, sensitivity, and specificity in identifying the causative pathogens. Also, the establishment of strategic partnerships between leading pharmaceutical companies and in vitro diagnostic manufacturers is on the rise. This trend is expected to transform the companion diagnostics segment into a highly profitable sector, showcasing immense growth potential. These collaborative efforts aim to advance the development of tailored diagnostic solutions, aligning with the evolving needs of healthcare and diagnostic capabilities in the region.

The Asia-Pacific market is poised to be the fastest-growing market, offering lucrative growth opportunities for Respiratory Syncytial Virus Diagnostics players during the forecast period. Factors such as the strong demand for automated



healthcare testing, which offers accurate and rapid disease diagnosis, is poised to drive market growth in the region. Specifically, China, India, Japan, and Malaysia are anticipated to emerge as the fastest-growing markets within the region. This growth is attributed to the ongoing development of healthcare systems and a surge in government initiatives. Additionally, the increasing infant population is expected to contribute significantly to regional market expansion. Notably, India accounts for nearly 20% of global annual childbirths, with approximately 25 million children born each year, according to UNICEF. Rising healthcare expenditure in developing nations such as India, Bangladesh, and Malaysia, coupled with government funding support, plays a pivotal role in driving market growth. Furthermore, the presence of untapped market opportunities, continuous enhancements in healthcare infrastructure, economic growth, and heightened patient awareness levels are key factors anticipated to fuel market growth in the region.

### Key Market Players

Becton, Dickinson, and Company Ltd.

Novartis AG

Abbott Laboratories Inc.

Thermo Fisher Scientific Inc.

Bio-Rad Laboratories, Inc.

F. Hoffmann-La Roche Ltd.

Merck KGaA

Quidel Corporation

Siemens Healthcare S.A.

Quest Diagnostics Incorporated

## Report Scope:

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

### Respiratory Syncytial Virus Diagnostics Market, By Product:

Direct Fluorescent Antibody (DFA) Method

Rapid Antigen Diagnostic Test (RADT)

Molecular Diagnostics

Chromatographic Immunoassay

Diagnostic Imaging

Gel Microdroplets

Flow Cytometry

Others

### Respiratory Syncytial Virus Diagnostics Market, By End-User:

Hospitals & Clinics

Laboratories

Homecare

### Respiratory Syncytial Virus 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 presents in the Global Respiratory Syncytial Virus Diagnostics Market.

## Available Customizations:

Global Respiratory Syncytial Virus Diagnostics 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 RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Product (Direct Fluorescent Antibody (DFA) Method, Rapid Antigen Diagnostic Test (RADT), Molecular Diagnostics, Chromatographic Immunoassay, Diagnostic Imaging, Gel Microdroplets, Flow Cytometry, Others)

- 5.2.2. By End-User (Hospitals & Clinics, Laboratory, Homecare)
- 5.2.3. By Region
- 5.2.4. By Company (2023)
- 5.3. Market Map

## **6. NORTH AMERICA RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Product
  - 6.2.2. By End-User
  - 6.2.3. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Respiratory Syncytial Virus Diagnostics 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 Product
      - 6.3.1.2.2. By End-User
  - 6.3.2. Canada Respiratory Syncytial Virus Diagnostics 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 Product
      - 6.3.2.2.2. By End-User
  - 6.3.3. Mexico Respiratory Syncytial Virus Diagnostics 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 Product
      - 6.3.3.2.2. By End-User

## **7. EUROPE RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value

## 7.2. Market Share & Forecast

### 7.2.1. By Product

### 7.2.2. By End-User

### 7.2.3. By Country

## 7.3. Europe: Country Analysis

### 7.3.1. Germany Respiratory Syncytial Virus Diagnostics 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 Product

##### 7.3.1.2.2. By End-User

### 7.3.2. United Kingdom Respiratory Syncytial Virus Diagnostics 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 Product

##### 7.3.2.2.2. By End-User

### 7.3.3. Italy Respiratory Syncytial Virus Diagnostics 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 Product

##### 7.3.3.2.2. By End-User

### 7.3.4. France Respiratory Syncytial Virus Diagnostics 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 Product

##### 7.3.4.2.2. By End-User

### 7.3.5. Spain Respiratory Syncytial Virus Diagnostics 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 Product

##### 7.3.5.2.2. By End-User

## **8. ASIA-PACIFIC RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET OUTLOOK**

## 8.1. Market Size & Forecast

### 8.1.1. By Value

## 8.2. Market Share & Forecast

### 8.2.1. By Product

### 8.2.2. By End-User

### 8.2.3. By Country

## 8.3. Asia-Pacific: Country Analysis

### 8.3.1. China Respiratory Syncytial Virus Diagnostics 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 Product

##### 8.3.1.2.2. By End-User

### 8.3.2. India Respiratory Syncytial Virus Diagnostics 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 Product

##### 8.3.2.2.2. By End-User

### 8.3.3. Japan Respiratory Syncytial Virus Diagnostics 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 Product

##### 8.3.3.2.2. By End-User

### 8.3.4. South Korea Respiratory Syncytial Virus Diagnostics 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 Product

##### 8.3.4.2.2. By End-User

### 8.3.5. Australia Respiratory Syncytial Virus Diagnostics 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 Product

##### 8.3.5.2.2. By End-User

## 9. SOUTH AMERICA RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET



## OUTLOOK

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Product

#### 9.2.2. By End-User

#### 9.2.3. By Country

### 9.3. South America: Country Analysis

#### 9.3.1. Brazil Respiratory Syncytial Virus Diagnostics 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 Product

###### 9.3.1.2.2. By End-User

#### 9.3.2. Argentina Respiratory Syncytial Virus Diagnostics 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 Product

###### 9.3.2.2.2. By End-User

#### 9.3.3. Colombia Respiratory Syncytial Virus Diagnostics 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 Product

###### 9.3.3.2.2. By End-User

## 10. MIDDLE EAST AND AFRICA RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET OUTLOOK

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Product

#### 10.2.2. By End-User

#### 10.2.3. By Country

### 10.3. MEA: Country Analysis

#### 10.3.1. South Africa Respiratory Syncytial Virus Diagnostics 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 Product
  - 10.3.1.2.2. By End-User
- 10.3.2. Saudi Arabia Respiratory Syncytial Virus Diagnostics 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 Product
    - 10.3.2.2.2. By End-User
- 10.3.3. UAE Respiratory Syncytial Virus Diagnostics 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 Product
    - 10.3.3.2.2. By End-User

## **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. GLOBAL RESPIRATORY SYNCYTIAL VIRUS DIAGNOSTICS MARKET: SWOT ANALYSIS**

## **14. COMPETITIVE LANDSCAPE**

- 14.1. Becton, Dickinson, and Company Ltd.
  - 14.1.1. Business Overview
  - 14.1.2. Product Offerings
  - 14.1.3. Recent Developments
  - 14.1.4. Key Personnel

- 14.1.5. SWOT Analysis
- 14.2. Novartis AG
- 14.3. Abbott Laboratories Inc.
- 14.4. Thermo Fisher Scientific Inc.
- 14.5. Bio-Rad Laboratories, Inc.
- 14.6. F. Hoffmann-La Roche Ltd.
- 14.7. Merck KGaA
- 14.8. Quidel Corporation
- 14.9. Siemens Healthcare S.A.
- 14.10. Quest Diagnostics Incorporated

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**

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