

Middle East & Africa In-Vitro Diagnostics Market Forecast to 2030 – Regional Analysis – by Product & Services (Reagents & Kits, Instruments, and Software & Services), Technology (Immunoassay/ Immunochemistry, Clinical Chemistry, Molecular Diagnostics, Microbiology, Blood Glucose Self- Monitoring, Coagulation & Hemostasis, Hematology, Urinalysis, and Others), Application (Infectious Diseases, Diabetes, Oncology, Cardiology, Autoimmune Diseases, Nephrology, and Others), and End User (Hospitals, Laboratories, Homecare, and Others)

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Abstracts

The Middle East & Africa in-vitro diagnostics market is expected to grow from US\$ 3,586.82 million in 2022 to US\$ 5,251.59 million by 2030. It is estimated to grow at a CAGR of 4.9% from 2022 to 2030.

Growth in Point-of-Care Testing and Surge in Demand for IVD during COVID-19
Pandemic Fuels Middle East & Africa In-Vitro Diagnostics Market

Point-of-care testing (POCT) is a pivotal opportunity in the in vitro diagnostics market, revolutionizing healthcare delivery with its portable and rapid diagnostic capabilities. These tests, conducted at or near the patient's location, offer immediate results, enabling timely clinical decision-making. Several factors drive the growth of POCT.

Firstly, the demand for convenient and swift diagnostic solutions in healthcare settings, such as emergency rooms, clinics, and home care, propels the expansion of POCT. Secondly, technological advancements have led to the development of compact and user-friendly POCT devices.

Moreover, the COVID-19 pandemic underscored the significance of rapid and accessible diagnostics. The pandemic accelerated the deployment and utilization of point-of-care COVID-19 tests, showcasing the relevance and potential of POCT in managing infectious diseases on a global scale. This experience accelerated research and development on POCT, further driving innovation and investment in portable testing solutions.

IVDs that are used in the diagnosis of infectious diseases include immunoassays, and molecular assays. Diagnostics companies also focus on making rapid advancements in their offerings to manage COVID-19. Further, regulatory authorities introduced temporary amendments or modifications to their standards, which favored the launches of new IVDs during the pandemic. The demand for molecular diagnostics and immunoassays surged due to these government initiatives. Thus, the COVID-19 pandemic has benefitted the in-vitro diagnostics market due to the rising demand for point-of-care (POC) diagnostics and laboratory testing procedures.

Middle East & Africa In-Vitro Diagnostics Market Overview

The Middle East & Africa in-vitro diagnostics market has been segmented into Saudi Arabia, the UAE, South Africa, and the Rest of Middle East & Africa. The market growth in Saudi Arabia is highly attributed to the big pool of diabetic population in the country, and government investment in healthcare. South Africa holds second largest share in terms of higher prevalence of chronic disorders in the country. The aforementioned factors are responsible for influential growth of in-vitro diagnostics market in the Middle East & Africa region. The government of Saudi Arabia is taking constructive steps to deal with the higher prevalence of chronic conditions and to fulfil the demand of a huge patient pool. The increasing incidence of cardiovascular diseases and infections is attracting major market players in the country to strengthen customer reach and increase geographic presence. As per a report published by the Saudi Health Council (2023), CVD cases in Saudi Arabia are expected to increase by approximately 480,000 people by 2035, with a threefold increase in economic burden (US\$ 9.8 billion). Patients with the highest risk of CVD belong to the age group of 61–75 years, with a prevalence of nearly 49%. Of the moderate to high-risk patients, males have a larger prevalence of

around 33% compared to 17% reported in females. As per the World Health Organization report, it is estimated that about 37% of deaths from noncommunicable diseases among people of all ages are caused by CVD in Saudi Arabia.

Early disease diagnosis, increasing healthcare investments, and rising high-tech adoption supporting advanced device manufacturing support the in-vitro diagnostics market growth in Saudi Arabia. As per a report published by the International Trade Administration of the US Department of Commerce (2022), the Saudi Arabian Government plans to invest over US\$ 65 billion in the development of its healthcare infrastructure. It also aims to raise private sector contribution from 40% to 65% by 2030, targeting the privatization of 2,300 primary health centers and 290 hospitals. The increasing number of laboratories and healthcare facilities is likely to create a lucrative environment for the growth of the in-vitro diagnostics market in Saudi Arabia. The impact of emerging trends, such as point-of-care testing (POCT), integration of digital health, and the role of artificial intelligence (AI) in diagnostics are also expected to fuel the market growth. Over the next three years, Lunit will provide the 'Lunit Insight MMG' AI-based breast cancer diagnostic solution to HMG, which will be used for breast cancer screening in Saudi Arabia. Thus, such developments in diagnostics boost the in-vitro diagnostics market in Saudi Arabia.

Middle East & Africa In-Vitro Diagnostics Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa In-Vitro Diagnostics Market Segmentation

The Middle East & Africa in-vitro diagnostics market is segmented into product & services, technology, application, end user, and country.

Based on product & services, the Middle East & Africa in-vitro diagnostics market is segmented into reagents & kits, instruments, and software & services. The reagents & kits segment held the largest share of the Middle East & Africa in-vitro diagnostics market in 2022.

Based on technology, the Middle East & Africa in-vitro diagnostics market is segmented into immunoassay/ immunochemistry, clinical chemistry, molecular diagnostics, microbiology, blood glucose self-monitoring, coagulation & hemostasis, hematology, urinalysis, and others. The immunoassay/ immunochemistry segment held the largest share of the Middle East & Africa in-vitro diagnostics market in 2022.

Based on application, the Middle East & Africa in-vitro diagnostics market is segmented into infectious diseases, diabetes, oncology, cardiology, autoimmune diseases, nephrology, and others. The infectious diseases segment held the largest share of the Middle East & Africa in-vitro diagnostics market in 2022.

Based on end user, the Middle East & Africa in-vitro diagnostics market is segmented into hospitals, laboratories, homecare, and others. The hospitals segment held the largest share of the Middle East & Africa in-vitro diagnostics market in 2022.

Based on country, the Middle East & Africa in-vitro diagnostics market is segmented into Saudi Arabia, the UAE, South Africa, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa in-vitro diagnostics market in 2022.

Abbott Laboratories, Becton Dickinson and Co, bioMerieux SA, Bio-Rad Laboratories Inc, Danaher Corp, F. Hoffmann-La Roche Ltd, Qiagen NV, Siemens AG, Sysmex Corp, and Thermo Fisher Scientific Inc are some of the leading companies operating in the Middle East & Africa in-vitro diagnostics market.

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