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South & Central America Newborn Screening Market Forecast to 2030 - Regional Analysis - by Product Type (Reagents and Assay Kits, and Instruments), Technology [Tandem Mass Spectrometry (TMS), Molecular Assays, Immunoassays and Enzymatic Assays, Pulse Oximetry Screening Technology, and Others], Test Type [Dry Blood Spot Test, Hearing Screen Test, Critical Congenital Heart Diseases (CCHD) Test, and Others], and End User (Hospitals and Clinics, and Diagnostic Laboratories)

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Abstracts

The South & Central America newborn screening market was valued at US$ 58.08 million in 2022 and is expected to reach US$ 100.64 million by 2030; it is estimated to grow at a CAGR of 7.1% from 2022 to 2030.

Genetic Screening of Newborns Fuels the South & Central America Newborn Screening Market

The demand for comprehensive genetic screening of newborns is rising with the deepening knowledge about the genetic causes of medical conditions and advancements in healthcare technologies. As a result, companies in the newborn screening market are developing innovative, cost-effective screening solutions. Yescarta and Zynteglo are two examples of authorized gene treatments for large B-cell lymphoma and beta-thalassemia. Further, the emergence of technologies conferring an ability to identify genetic predispositions to diseases at birth pave the way for

personalized healthcare, aligning with the broader trend of precision medicine.

Screening for genetic diseases during pregnancy also focuses on the early detection of pregnancy-related problems. Next-generation sequencing aids in the prenatal screening of neonates with a sensitivity of above 95% for detecting aneuploidies (such as Down syndrome and Trisomy 21) or partial chromosomal abnormalities (duplications or deletions) in all chromosomes. Fluorescence in-situ hybridization (FISH) is employed to detect monogenic illnesses such as sickle cell anemia; it also aids in an effective preimplantation genetic diagnosis. Noninvasive procedures such as the cell-free fetal DNA approach using maternal plasma are the recent advancements in genetic tests. The embryonic DNA can be distinguished from maternal DNA pieces based on differences in their sizes. Real-time PCR with fluorescent probes, shotgun sequencing (Solexa or Illumina), or huge targeted parallel sequencing can be used to examine DNA associated with fetal medical conditions. This would allow doctors to provide early molecular interventions with certain pharmacological therapies (pharmacogenetics) and to transform cells, tissues, and organs physically and chemically if this type of genetic screening is further researched. Thus, advancements in methods for screening infants for genetic disorders hold immense potential for the overall newborn screening market.

South & Central America Newborn Screening Market Overview

The newborn screening market in South & Central America is segmented into Brazil, Argentina, and the Rest of South & Central America. South & Central America is a region comprising 20 diversified countries in terms of geographic area, demographics, economy, society, ethnicity, and developing healthcare systems. Brazil, Argentina, and other South & Central American countries receive a comparatively low number of newborn screening programs than higher-income nations. This is mainly due to the economic, technical, and logistical constraints and differences in the social, cultural, and political backgrounds of each country in the region. The federal NewBorn Screening (NBS) program currently includes six conditions: Congenital Hypothyroidism, Cystic Fibrosis, galactosemia test, biotinidase deficiency, and Congenital Adrenal Hyperplasia in the region. Moreover, the newborn screening programs and capabilities in the region are continuously improving. Longstanding NBS programs in Chile, Costa Rica, Cuba, and Uruguay cover over 99% of newborns. The programs in Brazil, Mexico, and Argentina have increased their screening panels but require education, follow-up, legislation, and management improvements.

Brazil started its nationwide NBS program in 2001 with reference centers that covered more than 80% of newborns. This program includes six main conditions:

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Phenylketonuria, Congenital Hypothyroidism, hemoglobinopathies, Cystic Fibrosis, Congenital Adrenal Hyperplasia, and biotinidase deficiency. The National Neonatal Screening Program in Brazil is targeting to reach 100% of live births over the next few years. The country has also implemented the Extended NBS (ENBS) for other metabolic disorders through tandem mass spectrometer (TMS) screening in a few states. A law was passed in June 2021 by the government authority of Brazil, mandating that all states implement ENBS by June 2022, with a progressive expansion of the program to include lysosomal diseases, immunodeficiencies, and spinal muscular atrophy. Thus, the country has witnessed significant and sustained growth in the last few years, owing to the implementation of new programs, a rise in medical healthcare coverage, the enactment of new NBS laws, the expansion of the disease panel, and the higher involvement of government and public health authorities. Increasing the adoption of NBS/ENBS programs promotes early diagnosis and treatment in neonates, which prove to be the first step to improving health outcomes for patients.

South & Central America Newborn Screening Market Revenue and Forecast to 2030 (US$ Million)

South & Central America Newborn Screening Market Segmentation

The South & Central America newborn screening market is segmented based on product type, technology, test type, end user, and country.

Based on product type, the South & Central America newborn screening market is bifurcated into reagents and assay kits, and instruments. The reagents and assay kits segment held a larger South & Central America newborn screening market share in 2022. The reagents and assay kits segment is subsegmented into DNA-based assays, and immunoassays and enzymatic assays. Instruments segment is subsegmented into newborn disorder screening instruments, pulse oximeters, newborn hearing screening instruments, and other instruments.

In terms of technology, the South & Central America newborn screening market is categorized into tandem mass spectrometry (TMS), molecular assays, immunoassays and enzymatic assay, pulse oximetry screening technology, and other technologies. The pulse oximetry screening technology segment held the largest South & Central America newborn screening market share in 2022.

Based on test type, the South & Central America newborn screening market is categorized into dry blood spot test, hearing screen test, critical congenital heart

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diseases (CCHD) test, and other test types. The dry blood spot test segment held the largest South & Central America newborn screening market share in 2022.

By end user, the South & Central America newborn screening market is segmented into hospitals and clinics and diagnostic laboratories. The hospitals and clinics segment held a larger South & Central America newborn screening market share in 2022.

Based on country, the South & Central America newborn screening market is categorized into Brazil, Argentina, and the Rest of South & Central America. Brazil dominated the South & Central America newborn screening market in 2022.

Bio-Rad Laboratories Inc, Masimo Corp, Medtronic Plc, PerkinElmer Inc, and Waters Corp are some of the leading companies operating in the South & Central America newborn screening market.

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