

POC Molecular Diagnostics Market Size, Share and Growth Outlook 2026: By Product and Service, By Technology, By Application, By Test Location, Companies to 2034

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Abstracts

The global POC Molecular Diagnostics Market size is forecast to increase from \$4.47 Billion in 2026 to \$7.83 Billion in 2034 at a CAGR of 7.26% between 2026 and 2034.

The POC Molecular Diagnostics market report provides detailed analysis and outlook of POC Molecular Diagnostics segments including By Product and Service (Instruments / Analyzers, Assay Kits, Reagents, and Consumables, Software and Connectivity Services), By Technology (Polymerase Chain Reaction (PCR-based), Isothermal Amplification, Hybridization and Microarray Technologies, Other Technologies), By Application (Infectious Diseases, Respiratory Infections, Sexually Transmitted Infections, Healthcare-Associated Infections, Hepatitis and HIV, Oncology and Cancer Diagnostics, Hematology and Genetic Testing), By Test Location (Hospitals and Emergency Rooms, Physician Offices, Clinics, and Urgent Care Centers, Over-the-Counter (OTC) / Self-Testing and Homecare Settings, Research and Academic Laboratories) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Point-of-Care Molecular Diagnostics Industry Overview

Decentralized Molecular Testing, Rapid PCR Technologies, and Near-Patient Diagnostics are Driving the Point-of-Care Molecular Diagnostics Industry

The Point-of-Care Molecular Diagnostics industry is experiencing rapid growth as

healthcare systems increasingly prioritize decentralized testing, rapid clinical decision-making, and expanded access to laboratory-quality diagnostics outside traditional laboratory environments. Advances in miniaturized molecular platforms, cartridge-based PCR technologies, multiplex pathogen detection, and simplified sample preparation workflows are transforming how infectious diseases are diagnosed across physician offices, emergency departments, urgent care centers, pharmacies, and community healthcare settings. The industry is shifting from centralized molecular testing paradigms toward highly portable, automated diagnostic systems capable of delivering rapid and actionable results with minimal operator intervention. Regulatory support for CLIA-waived molecular testing platforms is further accelerating adoption across decentralized healthcare environments.

Rapid Molecular Platforms are Expanding Near-Patient Diagnostic Capabilities

One of the primary trends driving the point-of-care molecular diagnostics market is the development of ultra-fast molecular platforms capable of delivering laboratory-grade performance within clinically actionable timeframes. Healthcare providers increasingly require diagnostic systems that support immediate treatment decisions while maintaining analytical sensitivity and specificity. Roche's FDA-cleared and CLIA-waived Bordetella molecular assay on the cobas Liat platform demonstrates the growing role of rapid PCR technologies capable of detecting multiple pathogens directly at the point of care within minutes. Similarly, QuidelOrtho's acquisition of LEX Diagnostics and integration of the VELO molecular platform reflects the increasing strategic importance of decentralized multiplex RT-PCR technologies capable of diagnosing major respiratory pathogens without complex laboratory infrastructure. These developments highlight the industry's transition toward rapid, accessible, and highly automated molecular diagnostics.

Host-Response Diagnostics and Simplified Testing Workflows are Broadening Clinical Applications

The point-of-care diagnostics market is also expanding beyond direct pathogen detection through the integration of host-response biomarkers and simplified testing architectures designed for broad clinical deployment. Healthcare providers increasingly recognize the value of biomarker-based diagnostics that support treatment decisions, antimicrobial stewardship, and patient triage. Phase Scientific Americas' expansion of the FebriDx platform exemplifies this trend through its use of dual host-response biomarkers, including Myxovirus resistance protein A and C-reactive protein, to differentiate acute respiratory infections without requiring specialized instrumentation.

The combination of instrument-free operation, rapid turnaround times, and expanding reimbursement support illustrates the broader market movement toward accessible, decentralized diagnostic solutions that improve clinical decision-making while reducing dependence on centralized laboratory infrastructure.

POC Molecular Diagnostics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global POC Molecular Diagnostics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Abbott Laboratories, Cepheid (Danaher Corporation), Roche Diagnostics, bioMérieux SA, QuidelOrtho Corporation, Hologic, Inc., Thermo Fisher Scientific, QIAGEN N.V., Becton, Dickinson and Company, Meridian Bioscience. The POC Molecular Diagnostics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the POC Molecular Diagnostics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth POC Molecular Diagnostics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by POC Molecular Diagnostics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional POC Molecular Diagnostics markets

- Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

POC Molecular Diagnostics Market Competitive Benchmarking and Company Analysis

Leading companies in POC Molecular Diagnostics industry include- Abbott Laboratories, Cepheid (Danaher Corporation), Roche Diagnostics, bioMérieux SA, QuidelOrtho Corporation, Hologic, Inc., Thermo Fisher Scientific, QIAGEN N.V., Becton, Dickinson and Company, Meridian Bioscience. The POC Molecular Diagnostics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US POC Molecular Diagnostics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the POC Molecular Diagnostics market remains one of the strongest-performing segments in the country.

The US POC Molecular Diagnostics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US POC Molecular Diagnostics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across POC

Molecular Diagnostics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian POC Molecular Diagnostics markets

Canada's strong POC Molecular Diagnostics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian POC Molecular Diagnostics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany POC Molecular Diagnostics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest POC Molecular Diagnostics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of POC Molecular Diagnostics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany POC Molecular Diagnostics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the POC Molecular Diagnostics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support POC Molecular Diagnostics sales through 2034

France POC Molecular Diagnostics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's

National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK POC Molecular Diagnostics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of POC Molecular Diagnostics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China POC Molecular Diagnostics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China POC Molecular Diagnostics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of POC Molecular Diagnostics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese POC Molecular Diagnostics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India POC Molecular Diagnostics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian POC Molecular Diagnostics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil POC Molecular Diagnostics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa POC Molecular Diagnostics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

POC Molecular Diagnostics Market Segmentation

By Product and Service

Instruments / Analyzers

Assay Kits, Reagents, and Consumables

Software and Connectivity Services

By Technology

Polymerase Chain Reaction (PCR-based)

Isothermal Amplification

Hybridization and Microarray Technologies

Other Technologies

By Application

Infectious Diseases

Respiratory Infections

Sexually Transmitted Infections

Healthcare-Associated Infections

Hepatitis and HIV

Oncology and Cancer Diagnostics

Hematology and Genetic Testing

By Test Location

Hospitals and Emergency Rooms

Physician Offices, Clinics, and Urgent Care Centers

Over-the-Counter (OTC) / Self-Testing and Homecare Settings

Research and Academic Laboratories

Leading Companies in POC Molecular Diagnostics Industry (2026)

Abbott Laboratories

Cepheid (Danaher Corporation)

Roche Diagnostics

bioMérieux SA

QuidelOrtho Corporation

Hologic, Inc.

Thermo Fisher Scientific

QIAGEN N.V.

Becton, Dickinson and Company

Meridian Bioscience

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Software and Connectivity Services

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Healthcare-Associated Infections

Hepatitis and HIV

Oncology and Cancer Diagnostics

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