

In Vitro Diagnostics (IVD) Quality Control Market by Source (Plasma, Whole Blood, Urine), Technology (Immunoassay, Hematology, Microbiology, Coagulation), Manufacturer (Third party, OEM), End Users (Hospitals, Lab, Research) - Global Forecast to 2027

Market Report | 2023-02-17 | 332 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global IVD quality control market is projected to reach USD 1.6 billion by 2027 from USD 1.3 billion in 2022, at a CAGR of 5.4% during the forecast period. The competitive landscape includes the analysis of the key growth strategies adopted by major players between January 2019 and January 2023. Players in the global IVD Quality Control market have employed various strategies to expand their global footprint and increase their market shares such as agreements, divestitures, expansions, and acquisitions.

The product & service segment holds the highest share of the total IVD quality control market during the forecast period. The quality control products segment accounted for the largest share of the IVD quality control market in 2021. The increasing number of accredited laboratories to ensure the accuracy of diagnostic test results are driving the growth of the IVD quality control products market.

Serum/plasma-based controls segment accounted for the highest share for the Product and Services in total IVD quality control market during the forecast period.

Serum/plasma-based IVD quality controls are highly preferred by laboratories, as they are more stable after manipulation, such as freezing, storage, and lyophilization.; this segment accounted for the largest share of the quality control products market in 2021. The increasing number of IVD tests and the rising need for accuracy, reliability, and reproducibility of test results are the key factors driving the growth of the IVD quality control products market

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Third-party controls dominated the Manufacturer segmented of IVD quality control market

Based on manufacturer, the IVD quality control market is segmented into OEM controls and third-party controls. The third-party controls segment accounted for the largest share of the manufacturer segment in the global IVD quality control market in 2021. The independent controls segment is expected to grow at the highest CAGR in the third-party controls market during the forecast period. The growth of this segment is attributed to the fact that regulatory bodies recommend independent controls.

During the forecast period, hospitals accounted for the highest share in the end users segment of the global IVD quality control market.

The end users of IVD quality controls included in this report are research & academic institutes, hospitals, clinical laboratories, and other end users (blood banks, local public health laboratories, home health agencies, and nursing homes). The hospitals segment accounted for the largest share of the IVD quality control market in 2021, and Clinical laboratories are estimated to be the fastest-growing end-user segment in this market. The increasing burden of infectious diseases across the globe and the growing volume of genetic testing are the key factors driving the growth of this end-user segment.

North America is will account for the highest share in the global IVD quality control market

By Region, the global IVD quality control market accounted in this report is divided into five major regions-North America, Europe, Latin America, the Asia Pacific, and the Middle East & Africa. In 2021, North America accounted for the largest share of the global IVD quality control market, followed by Europe. In North America, US accounted for the largest share folowed by Canada. The APAC region has the highest CAGR of the global IVD quality control market.

Key players in the IVD quality control Market

Some of the key players in the market include Bio-Rad Laboratories, Inc. (US), Randox Laboratories Ltd. (UK), Thermo Fisher Scientific, Inc. (US), LGC Limited (UK), and Abbott Laboratories (US). Other prominent payers in the market include Roche Diagnostics (Switzerland), Siemens Healthineers (Germany), Danaher Corporation (US), Fortress Diagnostics (UK), SERO AS (US), Sysmex Corporation (Japan), Ortho-Clinical Diagnostics (US), Helena Laboratories Corporation (US), Quidel Corporation (US), Sun Diagnostics, LLC (US), Seegene Inc. (South Korea), ZeptoMetrix Corporation (US), Qnostics (UK), Bio-Techne Corporation (US), Microbiology (US), Microbix Biosystems (Canada), Streck, Inc. (US), Alpha-Tec Systems (US), Maine Molecular Quality Controls, Inc. (US), and Grifols, S.A. (Spain). These players aim to secure higher market shares through strategies such as product launches, expansions, agreements, and acquisitions.

Break of primary participants was as mentioned below:

-□By Company Type - Tier 1-60%, Tier 2-30%, and Tier 3-10%

-□By Designation - C-level-30%, Director-level-50%, Others-20%

-□By Region - North America-45%, Europe-15%, Asia Pacific-25%, Latin America- 10%, Middle East and Africa-5%

Research Coverage:

The market study covers the endoscopy equipment market across various segments. It aims at estimating the market size and the growth potential of this market across different segments by product, by application, by end user, and by region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies.

Reasons to Buy the Report

The report will help market leaders/new entrants in this market and provide information regarding the closest approximations of the IVD Quality Control market and its segments. This report will help stakeholders understand the competitive landscape, gain insights to position their businesses better, and plan suitable go-to-market strategies. The report will also help stakeholders in understanding the pulse of the market and gaining information on key market drivers, restraints, opportunities, and challenges.

Table of Contents:

1□INTRODUCTION□26

1.1□STUDY OBJECTIVES□26

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.2	MARKET DEFINITION	26
1.2.1	INCLUSIONS AND EXCLUSIONS	27
1.2.2	MARKETS COVERED	28
1.2.3	YEARS CONSIDERED	29
1.3	CURRENCY	29
TABLE 1	EXCHANGE RATES UTILIZED FOR CONVERSION TO USD	29
1.4	STAKEHOLDERS	30
1.5	SUMMARY OF CHANGES	30
1.5.1	REFINEMENTS IN SEGMENTS OF GLOBAL IVD QUALITY CONTROLS MARKET	30
1.5.2	UPDATED FINANCIAL INFORMATION/PRODUCT PORTFOLIOS OF PLAYERS	30
1.5.3	UPDATED MARKET DEVELOPMENTS OF PROFILED PLAYERS	31
1.5.4	ADDITION OF RECESSION IMPACT	31
2	RESEARCH METHODOLOGY	32
2.1	RESEARCH DATA	32
FIGURE 1	RESEARCH DESIGN	32
2.1.1	SECONDARY DATA	32
2.1.1.1	Key data from secondary sources	33
2.1.2	PRIMARY DATA	34
2.1.2.1	Primary sources	34
2.1.2.2	Key data from primary sources	35
2.1.2.3	Key industry insights	35
FIGURE 2	BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION	36
FIGURE 3	BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE AND DEMAND-SIDE PARTICIPANTS	36
2.2	MARKET SIZE ESTIMATION	37
FIGURE 4	SUPPLY-SIDE MARKET SIZE ESTIMATION: REVENUE SHARE ANALYSIS	37
FIGURE 5	REVENUE SHARE ANALYSIS ILLUSTRATION: BIO-RAD LABORATORIES, INC.	38
FIGURE 6	REVENUE ANALYSIS OF TOP FIVE COMPANIES: IVD QUALITY CONTROLS MARKET (2021)	38
FIGURE 7	CAGR PROJECTIONS FROM ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES OF IVD QUALITY CONTROLS MARKET (2022-2027)	40
FIGURE 8	CAGR PROJECTIONS	40
FIGURE 9	TOP-DOWN APPROACH	41
?		
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	42
FIGURE 10	MARKET DATA TRIANGULATION METHODOLOGY	42
2.4	MARKET SHARE ESTIMATION	43
2.5	ASSUMPTIONS	43
2.6	RISK ASSESSMENT	44
TABLE 2	RISK ASSESSMENT: IVD QUALITY CONTROLS MARKET	44
2.7	LIMITATIONS	44
2.7.1	METHODOLOGY-RELATED LIMITATIONS	44
2.7.2	SCOPE-RELATED LIMITATIONS	44
2.8	IMPACT OF RECESSION	44
3	EXECUTIVE SUMMARY	45
FIGURE 11	IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2022 VS. 2027 (USD MILLION)	45
FIGURE 12	IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)	46
FIGURE 13	IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2022 VS. 2027 (USD MILLION)	46
FIGURE 14	THIRD-PARTY CONTROLS MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)	47

FIGURE 15	IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2022 VS. 2027 (USD MILLION)	48
FIGURE 16	IVD QUALITY CONTROLS MARKET, BY END USER, 2022 VS. 2027 (USD MILLION)	49
FIGURE 17	GEOGRAPHICAL SNAPSHOT OF IVD QUALITY CONTROLS MARKET	50
4	PREMIUM INSIGHTS	51
4.1	IVD QUALITY CONTROLS MARKET OVERVIEW	51
FIGURE 18	GROWING ADOPTION OF THIRD-PARTY CONTROLS AND INCREASING DEMAND FOR EXTERNAL QUALITY ASSESSMENT TO DRIVE MARKET	51
4.2	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY AND COUNTRY (2021)	52
FIGURE 19	IMMUNOCHEMISTRY SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2021	52
4.3	IVD QUALITY CONTROLS MARKET: REGIONAL MIX (2022-2027)	53
FIGURE 20	ASIA PACIFIC TO WITNESS HIGHEST GROWTH DURING FORECAST PERIOD	53
4.4	IVD QUALITY CONTROLS MARKET: DEVELOPED VS. DEVELOPING MARKETS	53
FIGURE 21	DEVELOPING MARKETS TO REGISTER HIGHER GROWTH FROM 2022 TO 2027	53
4.5	IVD QUALITY CONTROLS MARKET: GEOGRAPHIC MIX	54
FIGURE 22	CHINA TO WITNESS HIGHEST GROWTH DURING FORECAST PERIOD	54
5	MARKET OVERVIEW	55
5.1	INTRODUCTION	55
5.2	MARKET DYNAMICS	55
FIGURE 23	IVD QUALITY CONTROLS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	55
5.2.1	MARKET DRIVERS	56
5.2.1.1	Increasing number of accredited clinical laboratories	56
FIGURE 24	NUMBER OF LABORATORIES WITH CLIA ACCREDITATION, BY ORGANIZATION (2022)	56
5.2.1.2	Growing adoption of third-party quality controls	57
5.2.1.3	Rising demand for external quality assessment support	57
5.2.1.4	Rising geriatric population and subsequent growth in prevalence of chronic and infectious diseases	58
TABLE 3	ESTIMATED INCREASE IN GERIATRIC POPULATION, BY REGION (2019-2050)	58
FIGURE 25	ESTIMATED DIABETIC POPULATION, BY REGION, 2021 VS. 2030 VS. 2045 (MILLION)	59
FIGURE 26	GLOBAL CANCER INCIDENCE, 2018-2040 (MILLION)	59
5.2.1.5	Increasing adoption of POC instruments in developed regions	60
TABLE 4	MARKET DRIVERS: IMPACT ANALYSIS	60
5.2.2	MARKET RESTRAINTS	60
5.2.2.1	Additional costs and budget constraints in hospitals and laboratories	60
5.2.2.2	Unfavorable reimbursement scenario for IVD tests	61
TABLE 5	MARKET RESTRAINTS: IMPACT ANALYSIS	61
5.2.3	MARKET OPPORTUNITIES	61
5.2.3.1	Rising demand for multianalyte controls	61
TABLE 6	MARKET OPPORTUNITIES: IMPACT ANALYSIS	61
5.2.4	MARKET CHALLENGES	62
5.2.4.1	Stringent product approval process	62
5.2.4.2	Lack of regulations for clinical laboratory accreditation in several emerging countries	62
TABLE 7	MARKET CHALLENGES: IMPACT ANALYSIS	62
5.3	INDUSTRY TRENDS	63
5.3.1	LYOPHILIZED/FREEZE-DRIED CONTROLS	63
TABLE 8	LYOPHILIZED OR FREEZE-DRIED QUALITY CONTROLS OFFERED BY KEY MARKET PLAYERS	63
5.3.2	TRENDS ON ANALYTE SOURCE: HUMAN VS. ANIMAL ORIGIN	63
5.3.3	CONSOLIDATION OF LABORATORIES	64
5.4	VALUE CHAIN ANALYSIS	64

FIGURE 27	IVD QUALITY CONTROLS MARKET: VALUE CHAIN ANALYSIS	64
5.5	SUPPLY CHAIN ANALYSIS	65
FIGURE 28	IVD QUALITY CONTROLS MARKET: SUPPLY CHAIN ANALYSIS	66
5.6	ECOSYSTEM MARKET MAP	66
FIGURE 29	IVD QUALITY CONTROLS MARKET: ECOSYSTEM MARKET MAP	67
5.7	PORTER'S FIVE FORCES ANALYSIS	67
TABLE 9	PORTER'S FIVE FORCES ANALYSIS	67
5.7.1	INTENSITY OF COMPETITIVE RIVALRY	68
5.7.2	BARGAINING POWER OF SUPPLIERS	68
5.7.3	BARGAINING POWER OF BUYERS	68
5.7.4	THREAT OF SUBSTITUTES	68
5.7.5	THREAT OF NEW ENTRANTS	69
5.8	REGULATORY ANALYSIS	69
5.8.1	NORTH AMERICA	69
5.8.1.1	US	69
TABLE 10	US: CLASSIFICATION OF QUALITY CONTROL MATERIAL	70
TABLE 11	US: TIME, COST, AND COMPLEXITY OF REGISTRATION	70
5.8.1.2	Canada	71
TABLE 12	CANADA: CLASSIFICATION OF IVD PRODUCTS	71
TABLE 13	CANADA: TIME, COST, AND COMPLEXITY OF REGISTRATION	71
5.8.2	EUROPE	71
TABLE 14	EUROPE: ACCREDITATION BODIES FOR MEDICAL LABORATORIES	72
TABLE 15	EUROPE: TIME, COST, AND COMPLEXITY OF REGISTRATION	72
5.8.3	ASIA PACIFIC	73
5.8.3.1	Japan	73
TABLE 16	JAPAN: TIME, COST, AND COMPLEXITY OF REGISTRATION	73
5.8.3.2	China	74
TABLE 17	CHINA: TIME, COST, AND COMPLEXITY OF REGISTRATION	74
5.8.3.3	India	74
TABLE 18	INDIA: TIME, COST, AND COMPLEXITY OF REGISTRATION	75
5.9	PATENT ANALYSIS	75
5.9.1	PATENT PUBLICATION TRENDS FOR IVD QUALITY CONTROLS	75
FIGURE 30	PATENT PUBLICATION TRENDS (2012-2022)	75
5.9.2	TOP APPLICANTS (COMPANIES) FOR PATENTS RELATED TO IVD QUALITY CONTROL	76
FIGURE 31	TOP APPLICANTS AND OWNERS (COMPANIES/INSTITUTES) FOR IVD QUALITY CONTROL PATENTS (2012-2022)	76
5.9.3	JURISDICTION ANALYSIS: TOP APPLICANT (COUNTRIES/REGIONS) FOR PATENTS IN IVD QUALITY CONTROLS MARKET	76
FIGURE 32	JURISDICTION ANALYSIS: TOP APPLICANT (COUNTRIES/REGIONS) FOR PATENTS IN IVD QUALITY CONTROL (2012-2022)	77
5.10	TECHNOLOGY ANALYSIS	77
5.10.1	KEY TECHNOLOGIES	78
5.10.1.1	Analyte extraction	78
5.10.1.1.1	Specimen pooling	78
5.10.1.1.2	Human monoclonals	78
5.10.1.2	Specimen processing	78
5.10.1.2.1	Inactivation	78
5.10.1.2.2	Dilution	79
5.10.1.3	Preservation	79

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.10.2	ADJACENT TECHNOLOGIES	79
5.10.2.1	Sensor-based quality control	79
?		
5.10.3	COMPLEMENTARY TECHNOLOGIES	79
5.10.3.1	Storage	79
5.10.3.2	Transport	80
5.10.3.3	Temperature control	80
5.10.3.4	Temperature monitoring	80
6	IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE	81
6.1	INTRODUCTION	82
TABLE 19	IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	82
6.2	QUALITY CONTROL PRODUCTS	82
TABLE 20	IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	83
TABLE 21	IVD QUALITY CONTROL PRODUCTS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	83
6.2.1	SERUM/PLASMA-BASED CONTROLS	84
6.2.1.1	Greater stability and accuracy of diagnostic test results to increase demand for serum/plasma-based controls	84
TABLE 22	SERUM/PLASMA-BASED QUALITY CONTROLS OFFERED BY KEY MARKET PLAYERS	84
TABLE 23	SERUM/PLASMA-BASED QUALITY CONTROL PRODUCTS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	85
6.2.2	WHOLE BLOOD-BASED CONTROLS	85
6.2.2.1	Rising need to ensure high-quality clinical test results to drive market	85
TABLE 24	WHOLE BLOOD-BASED QUALITY CONTROLS OFFERED BY KEY MARKET PLAYERS	86
TABLE 25	WHOLE BLOOD-BASED QUALITY CONTROL PRODUCTS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	87
6.2.3	URINE-BASED CONTROLS	87
6.2.3.1	Growing incidence of kidney diseases to drive demand for urine-based controls	87
TABLE 26	URINE-BASED IVD CONTROLS OFFERED BY KEY MARKET PLAYERS	88
TABLE 27	URINE-BASED QUALITY CONTROL PRODUCTS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	89
6.2.4	OTHER CONTROLS	89
TABLE 28	OTHER CONTROLS OFFERED BY KEY MARKET PLAYERS	90
TABLE 29	OTHER QUALITY CONTROL PRODUCTS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	91
6.3	DATA MANAGEMENT SOLUTIONS	91
6.3.1	RIISING FOCUS ON IMPROVING ANALYTICAL PERFORMANCE OF CLINICAL LABORATORIES TO SUPPORT MARKET GROWTH	91
TABLE 30	DATA MANAGEMENT SOLUTIONS OFFERED BY KEY MARKET PLAYERS	92
TABLE 31	IVD DATA MANAGEMENT SOLUTIONS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	93
?		
6.4	QUALITY ASSURANCE SERVICES	94
6.4.1	GROWING NEED FOR PERFORMANCE ASSESSMENT OF CLINICAL LABORATORIES TO INCREASE DEMAND FOR QUALITY ASSURANCE SERVICES	94
TABLE 32	QUALITY ASSURANCE SERVICES OFFERED BY KEY MARKET PLAYERS	94
TABLE 33	IVD QUALITY ASSURANCE SERVICES MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	95
7	IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY	96
7.1	INTRODUCTION	97
TABLE 34	IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	97
7.2	IMMUNOCHEMISTRY	98
7.2.1	FOCUS ON MONITORING PRECISION OF IMMUNOASSAY TESTS TO DRIVE ADOPTION OF IMMUNOASSAY CONTROLS	98
TABLE 35	QUALITY CONTROLS FOR IMMUNOCHEMISTRY OFFERED BY KEY MARKET PLAYERS	98
TABLE 36	IVD QUALITY CONTROLS MARKET FOR IMMUNOCHEMISTRY, BY COUNTRY, 2020-2027 (USD MILLION)	99
7.3	CLINICAL CHEMISTRY	100

7.3.1	RISING INCIDENCE OF LIFESTYLE DISEASES PROVIDES OPPORTUNITIES FOR MARKET GROWTH	100
	TABLE 37	QUALITY CONTROLS FOR CLINICAL CHEMISTRY OFFERED BY KEY MARKET PLAYERS
	TABLE 38	IVD QUALITY CONTROLS MARKET FOR CLINICAL CHEMISTRY, BY COUNTRY, 2020-2027 (USD MILLION)
7.4	MOLECULAR DIAGNOSTICS	101
7.4.1	GROWING INCIDENCE OF INFECTIOUS DISEASES TO DRIVE DEMAND FOR MOLECULAR DIAGNOSTIC CONTROLS	101
	TABLE 39	QUALITY CONTROLS FOR MOLECULAR DIAGNOSTICS OFFERED BY KEY MARKET PLAYERS
	TABLE 40	IVD QUALITY CONTROLS MARKET FOR MOLECULAR DIAGNOSTICS, BY COUNTRY, 2020-2027 (USD MILLION)
7.5	MICROBIOLOGY	104
7.5.1	INCREASING ADOPTION OF AUTOMATED CLINICAL MICROBIOLOGY TESTING INSTRUMENTS TO SUPPORT MARKET GROWTH	104
	TABLE 41	QUALITY CONTROLS FOR MICROBIOLOGY OFFERED BY KEY MARKET PLAYERS
	TABLE 42	IVD QUALITY CONTROLS MARKET FOR MICROBIOLOGY, BY COUNTRY, 2020-2027 (USD MILLION)
7.6	HEMATOLOGY	105
7.6.1	NEED FOR ACCURACY IN HEMATOLOGICAL TEST RESULTS TO DRIVE RELIANCE ON HEMATOLOGY QUALITY CONTROLS	105
	TABLE 43	QUALITY CONTROLS FOR HEMATOLOGY OFFERED BY KEY MARKET PLAYERS
	TABLE 44	IVD QUALITY CONTROLS MARKET FOR HEMATOLOGY, BY COUNTRY, 2020-2027 (USD MILLION)
	?	
7.7	COAGULATION AND HEMOSTASIS	107
7.7.1	GROWING NUMBER OF CARDIOVASCULAR SURGERIES TO DRIVE DEMAND FOR COAGULATION AND HEMOSTASIS TESTING	107
	TABLE 45	QUALITY CONTROLS FOR COAGULATION AND HEMOSTASIS OFFERED BY KEY MARKET PLAYERS
	TABLE 46	IVD QUALITY CONTROLS MARKET FOR COAGULATION AND HEMOSTASIS, BY COUNTRY, 2020-2027 (USD MILLION)
7.8	OTHER TECHNOLOGIES	110
	TABLE 47	QUALITY CONTROLS FOR OTHER TECHNOLOGIES OFFERED BY KEY MARKET PLAYERS
	TABLE 48	IVD QUALITY CONTROLS MARKET FOR OTHER TECHNOLOGIES, BY COUNTRY, 2020-2027 (USD MILLION)
8	IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE	112
8.1	INTRODUCTION	113
	TABLE 49	IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)
8.2	THIRD-PARTY CONTROLS	113
	TABLE 50	IVD THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)
	TABLE 51	IVD THIRD-PARTY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)
8.2.1	INDEPENDENT CONTROLS	115
8.2.1.1	Provide unbiased and independent performance assessment for analytical processes	115
	TABLE 52	INDEPENDENT CONTROLS OFFERED BY KEY MARKET PLAYERS
	TABLE 53	INDEPENDENT THIRD-PARTY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)
8.2.2	INSTRUMENT-SPECIFIC CONTROLS	117
8.2.2.1	Designed to evaluate and monitor performance of instruments	117
	TABLE 54	INSTRUMENT-SPECIFIC CONTROLS OFFERED BY KEY MARKET PLAYERS
	TABLE 55	INSTRUMENT-SPECIFIC THIRD-PARTY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)
8.3	ORIGINAL EQUIPMENT MANUFACTURER CONTROLS	118
8.3.1	OEM CONTROLS TO WITNESS LOWER ADOPTION AS THEY ARE LESS SENSITIVE TO QC-RELATED ISSUES	118
	TABLE 56	OEM CONTROLS OFFERED BY KEY MARKET PLAYERS
	TABLE 57	IVD OEM CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)
9	IVD QUALITY CONTROLS MARKET, BY END USER	121
9.1	INTRODUCTION	122
	TABLE 58	IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)
9.2	HOSPITALS	122
9.2.1	LARGE VOLUME OF IVD PROCEDURES PERFORMED TO DRIVE MARKET	122

TABLE 59	IVD QUALITY CONTROLS MARKET FOR HOSPITALS, BY COUNTRY, 2020-2027 (USD MILLION)	123
9.3	CLINICAL LABORATORIES	124
9.3.1	GROWING NUMBER OF ACCREDITED LABORATORIES TO DRIVE MARKET	124
TABLE 60	IVD QUALITY CONTROLS MARKET FOR CLINICAL LABORATORIES, BY COUNTRY, 2020-2027 (USD MILLION)	125
9.4	ACADEMIC AND RESEARCH INSTITUTES	125
9.4.1	RIISING FOCUS ON ACCURATE RESEARCH RESULTS TO SUPPORT MARKET GROWTH	125
TABLE 61	IVD QUALITY CONTROLS MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2020-2027 (USD MILLION)	126
9.5	OTHER END USERS	127
TABLE 62	IVD QUALITY CONTROLS MARKET FOR OTHER END USERS, BY COUNTRY, 2020-2027 (USD MILLION)	127
10	IVD QUALITY CONTROLS MARKET, BY REGION	128
10.1	INTRODUCTION	129
TABLE 63	IVD QUALITY CONTROLS MARKET, BY REGION, 2020-2027 (USD MILLION)	129
TABLE 64	IVD QUALITY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	130
10.2	NORTH AMERICA	130
FIGURE 33	NORTH AMERICA: IVD QUALITY CONTROLS MARKET SNAPSHOT	131
10.2.1	NORTH AMERICA: RECESSION IMPACT	132
TABLE 65	NORTH AMERICA: IVD QUALITY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	132
TABLE 66	NORTH AMERICA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	132
TABLE 67	NORTH AMERICA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	133
TABLE 68	NORTH AMERICA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	133
TABLE 69	NORTH AMERICA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	133
TABLE 70	NORTH AMERICA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	134
TABLE 71	NORTH AMERICA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	134
10.2.2	US	134
10.2.2.1	High healthcare expenditure to propel market growth	134
TABLE 72	US: KEY MACROINDICATORS	135
TABLE 73	US: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	135
TABLE 74	US: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	135
TABLE 75	US: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	136
TABLE 76	US: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	136
TABLE 77	US: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	136
TABLE 78	US: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	137
10.2.3	CANADA	137
10.2.3.1	Government initiatives to support market growth	137
TABLE 79	CANADA: KEY MACROINDICATORS	138
TABLE 80	CANADA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	138
TABLE 81	CANADA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	138
TABLE 82	CANADA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	139
TABLE 83	CANADA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	139
TABLE 84	CANADA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	139
TABLE 85	CANADA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	140
10.3	EUROPE	140
10.3.1	EUROPE: RECESSION IMPACT	140
TABLE 86	EUROPE: IVD QUALITY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	141
TABLE 87	EUROPE: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	141
TABLE 88	EUROPE: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	142

TABLE 89	EUROPE: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	142
TABLE 90	EUROPE: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	142
TABLE 91	EUROPE: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	143
TABLE 92	EUROPE: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	143
10.3.2	GERMANY	143
10.3.2.1	Rising volume of high-quality tests performed to support market growth	143
TABLE 93	GERMANY: KEY MACROINDICATORS	144
TABLE 94	GERMANY: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	144
TABLE 95	GERMANY: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	144
TABLE 96	GERMANY: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	145
TABLE 97	GERMANY: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	145
TABLE 98	GERMANY: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	145
TABLE 99	GERMANY: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	146
?		
10.3.3	FRANCE	146
10.3.3.1	Increasing prevalence of infectious diseases and growing demand for early diagnosis to drive market	146
TABLE 100	FRANCE: KEY MACROINDICATORS	146
TABLE 101	FRANCE: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	147
TABLE 102	FRANCE: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	147
TABLE 103	FRANCE: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	147
TABLE 104	FRANCE: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	148
TABLE 105	FRANCE: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	148
TABLE 106	FRANCE: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	148
10.3.4	UK	149
10.3.4.1	Growth in life sciences industry and increasing research to drive market	149
TABLE 107	UK: KEY MACROINDICATORS	149
TABLE 108	UK: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	150
TABLE 109	UK: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	150
TABLE 110	UK: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	150
TABLE 111	UK: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	151
TABLE 112	UK: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	151
TABLE 113	UK: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	151
10.3.5	ITALY	152
10.3.5.1	Growing disease prevalence to drive demand for better and more accurate disease diagnosis	152
TABLE 114	ITALY: KEY MACROINDICATORS	152
TABLE 115	ITALY: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	152
TABLE 116	ITALY: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	153
TABLE 117	ITALY: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	153
TABLE 118	ITALY: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	153
TABLE 119	ITALY: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	154
TABLE 120	ITALY: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	154
?		
10.3.6	SPAIN	154
10.3.6.1	Increasing demand for prenatal and genetic testing and rising focus on laboratory consolidation to support market growth	154
TABLE 121	SPAIN: KEY MACROINDICATORS	155
TABLE 122	SPAIN: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	155

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 123	SPAIN: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	155
TABLE 124	SPAIN: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	156
TABLE 125	SPAIN: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	156
TABLE 126	SPAIN: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	156
TABLE 127	SPAIN: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	157
10.3.7	RUSSIA	157
10.3.7.1	Increasing access to quality healthcare and growing incidence of lifestyle and infectious diseases to drive market	157
TABLE 128	RUSSIA: KEY MACROINDICATORS	157
TABLE 129	RUSSIA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	158
TABLE 130	RUSSIA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	158
TABLE 131	RUSSIA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	158
TABLE 132	RUSSIA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	159
TABLE 133	RUSSIA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	159
TABLE 134	RUSSIA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	159
10.3.8	REST OF EUROPE	160
TABLE 135	REST OF EUROPE: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	160
TABLE 136	REST OF EUROPE: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	160
TABLE 137	REST OF EUROPE: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	161
TABLE 138	REST OF EUROPE: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	161
TABLE 139	REST OF EUROPE: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	161
TABLE 140	REST OF EUROPE: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	162
?		
10.4	ASIA PACIFIC	162
FIGURE 34	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET SNAPSHOT	163
10.4.1	ASIA PACIFIC: RECESSION IMPACT	164
TABLE 141	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	164
TABLE 142	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	164
TABLE 143	ASIA PACIFIC: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	165
TABLE 144	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	165
TABLE 145	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	165
TABLE 146	ASIA PACIFIC: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	166
TABLE 147	ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	166
10.4.2	JAPAN	166
10.4.2.1	Well-developed healthcare system and demand for improvements in quality of IVD test results to drive market	166
TABLE 148	JAPAN: KEY MACROINDICATORS	167
TABLE 149	JAPAN: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	167
TABLE 150	JAPAN: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	167
TABLE 151	JAPAN: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	168
TABLE 152	JAPAN: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	168
TABLE 153	JAPAN: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	168
TABLE 154	JAPAN: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	169
10.4.3	CHINA	169
10.4.3.1	Growing access to modern healthcare and government support to boost market growth	169
TABLE 155	CHINA: KEY MACROINDICATORS	170
TABLE 156	CHINA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	170
TABLE 157	CHINA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	170
TABLE 158	CHINA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	171

TABLE 159	CHINA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	171
TABLE 160	CHINA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	171
TABLE 161	CHINA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	172
10.4.4	INDIA	172
10.4.4.1	Rising need to secure NABL accreditations to drive demand for quality controls	172
FIGURE 35	INDIA: INCREASING NUMBER OF LABORATORIES WITH NABL ACCREDITATIONS, 2012-2022	172
TABLE 162	INDIA: KEY MACROINDICATORS	173
TABLE 163	INDIA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	173
TABLE 164	INDIA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	174
TABLE 165	INDIA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	174
TABLE 166	INDIA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	174
TABLE 167	INDIA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	175
TABLE 168	INDIA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	175
10.4.5	AUSTRALIA	175
10.4.5.1	Initiatives to enhance access to healthcare and improve infrastructure to propel market growth	175
TABLE 169	AUSTRALIA: KEY MACROINDICATORS	176
TABLE 170	AUSTRALIA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	176
TABLE 171	AUSTRALIA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	177
TABLE 172	AUSTRALIA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	177
TABLE 173	AUSTRALIA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	177
TABLE 174	AUSTRALIA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	178
TABLE 175	AUSTRALIA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	178
10.4.6	SOUTH KOREA	178
10.4.6.1	Rising healthcare expenditure and growing number of hospitals to drive market	178
TABLE 176	SOUTH KOREA: KEY MACROINDICATORS	179
TABLE 177	SOUTH KOREA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	179
TABLE 178	SOUTH KOREA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	179
TABLE 179	SOUTH KOREA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	180
TABLE 180	SOUTH KOREA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	180
TABLE 181	SOUTH KOREA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	180
TABLE 182	SOUTH KOREA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	181
10.4.7	REST OF ASIA PACIFIC	181
TABLE 183	REST OF ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	182
TABLE 184	REST OF ASIA PACIFIC: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	182
TABLE 185	REST OF ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	183
TABLE 186	REST OF ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	183
TABLE 187	REST OF ASIA PACIFIC: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	183
TABLE 188	REST OF ASIA PACIFIC: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	184
10.5	LATIN AMERICA	184
10.5.1	LATIN AMERICA: RECESSION IMPACT	184
TABLE 189	LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY COUNTRY, 2020-2027 (USD MILLION)	185
TABLE 190	LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION)	185
TABLE 191	LATIN AMERICA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION)	185
TABLE 192	LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION)	186
TABLE 193	LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION)	186
TABLE 194	LATIN AMERICA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION)	186
TABLE 195	LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION)	187

10.5.2 BRAZIL 187

10.5.2.1 Brazil dominates Latin American IVD quality controls market 187

TABLE 196 BRAZIL: KEY MACROINDICATORS 188

TABLE 197 BRAZIL: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION) 188

TABLE 198 BRAZIL: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION) 189

TABLE 199 BRAZIL: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION) 189

TABLE 200 BRAZIL: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION) 189

TABLE 201 BRAZIL: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION) 189

TABLE 202 BRAZIL: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION) 190

10.5.3 MEXICO 190

10.5.3.1 Increasing number of accredited clinical laboratories to support market growth 190

TABLE 203 MEXICO: KEY MACROINDICATORS 190

TABLE 204 MEXICO: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION) 191

TABLE 205 MEXICO: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION) 191

TABLE 206 MEXICO: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION) 191

TABLE 207 MEXICO: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION) 192

TABLE 208 MEXICO: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION) 192

TABLE 209 MEXICO: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION) 192

10.5.4 REST OF LATIN AMERICA 193

TABLE 210 REST OF LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION) 193

TABLE 211 REST OF LATIN AMERICA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION) 193

TABLE 212 REST OF LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION) 194

TABLE 213 REST OF LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION) 194

TABLE 214 REST OF LATIN AMERICA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION) 194

TABLE 215 REST OF LATIN AMERICA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION) 195

10.6 MIDDLE EAST AND AFRICA 195

10.6.1 MIDDLE EAST AND AFRICA: RECESSION IMPACT 195

10.6.2 RISING CANCER INCIDENCE TO DRIVE MARKET 195

TABLE 216 MIDDLE EAST AND AFRICA: IVD QUALITY CONTROLS MARKET, BY PRODUCT AND SERVICE, 2020-2027 (USD MILLION) 196

TABLE 217 MIDDLE EAST AND AFRICA: IVD QUALITY CONTROL PRODUCTS MARKET, BY TYPE, 2020-2027 (USD MILLION) 196

TABLE 218 MIDDLE EAST AND AFRICA: IVD QUALITY CONTROLS MARKET, BY TECHNOLOGY, 2020-2027 (USD MILLION) 197

TABLE 219 MIDDLE EAST AND AFRICA: IVD QUALITY CONTROLS MARKET, BY MANUFACTURER TYPE, 2020-2027 (USD MILLION) 197

TABLE 220 MIDDLE EAST AND AFRICA: THIRD-PARTY CONTROLS MARKET, BY TYPE, 2020-2027 (USD MILLION) 197

TABLE 221 MIDDLE EAST AND AFRICA: IVD QUALITY CONTROLS MARKET, BY END USER, 2020-2027 (USD MILLION) 198

?

11 COMPETITIVE LANDSCAPE 199

11.1 OVERVIEW 199

11.2 STRATEGIES ADOPTED BY KEY PLAYERS 199

11.3 REVENUE SHARE ANALYSIS OF KEY MARKET PLAYERS 200

FIGURE 36 REVENUE ANALYSIS OF TOP PLAYERS IN IVD QUALITY CONTROLS MARKET 200

11.4 MARKET SHARE ANALYSIS 200

FIGURE 37 IVD QUALITY CONTROLS MARKET SHARE, BY KEY PLAYER, 2021 201

11.5 COMPETITIVE BENCHMARKING 202

TABLE 222 PRODUCT PORTFOLIO ANALYSIS: IVD QUALITY CONTROLS MARKET 202

TABLE 223 TECHNOLOGY PORTFOLIO ANALYSIS: IVD QUALITY CONTROLS MARKET 203

TABLE 224 MANUFACTURER TYPE PORTFOLIO ANALYSIS: IVD QUALITY CONTROLS MARKET 204

TABLE 225 END-USER PORTFOLIO ANALYSIS: IVD QUALITY CONTROLS MARKET 205

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.6	REGIONAL FOOTPRINT OF KEY PLAYERS	206
TABLE 226	REGIONAL REVENUE MIX: IVD QUALITY CONTROLS MARKET	206
11.7	COMPANY EVALUATION QUADRANT FOR KEY PLAYERS	207
11.7.1	STARS	208
11.7.2	EMERGING LEADERS	208
11.7.3	PERVASIVE PLAYERS	208
11.7.4	PARTICIPANTS	208
FIGURE 38	IVD QUALITY CONTROLS MARKET: COMPANY EVALUATION QUADRANT FOR KEY PLAYERS (2021)	209
11.8	R&D EXPENDITURE	210
FIGURE 39	IVD QUALITY CONTROLS MARKET: R&D EXPENDITURE (USD MILLION), 2021	210
11.9	COMPANY EVALUATION QUADRANT FOR STARTUPS/SMES	211
11.9.1	PROGRESSIVE COMPANIES	211
11.9.2	DYNAMIC COMPANIES	211
11.9.3	STARTING BLOCKS	211
11.9.4	RESPONSIVE COMPANIES	211
FIGURE 40	IVD QUALITY CONTROLS MARKET: COMPANY EVALUATION QUADRANT FOR STARTUPS/SMES (2021)	212
11.10	COMPETITIVE SITUATIONS AND TRENDS	213
11.10.1	DEALS	213
TABLE 227	DEALS, JANUARY 2019-JANUARY 2023	213
11.10.2	PRODUCT LAUNCHES	214
TABLE 228	PRODUCT LAUNCHES, JANUARY 2019-JANUARY 2023	214
11.10.3	OTHER DEVELOPMENTS	215
TABLE 229	OTHER DEVELOPMENTS, JANUARY 2019-JANUARY 2023	215

In Vitro Diagnostics (IVD) Quality Control Market by Source (Plasma, Whole Blood, Urine), Technology (Immunoassay, Hematology, Microbiology, Coagulation), Manufacturer (Third party, OEM), End Users (Hospitals, Lab, Research) - Global Forecast to 2027

Market Report | 2023-02-17 | 332 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature