

Global Respiratory Disease Testing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Respiratory Disease Testing Market size is estimated at USD 5.80 billion in 2024, and is expected to reach USD 6.97 billion by 2029, growing at a CAGR of 3.77% during the forecast period (2024-2029).

The studied market was hampered due to strict lockdowns and regulations by the government authorities at the beginning of the COVID-19 pandemic. The supply chain was disrupted due to this. The lockdowns imposed were followed by the cancellation of medical visits and disease diagnoses. This resulted in delays in respiratory testing and diagnostic procedures. However, the incidence of COVID-19 among respiratory patients increased. This created a demand for testing during the pandemic. According to the research article published in December 2021 by Respiratory Medicine and Research, patients with chronic respiratory diseases (CRD) were likely to experience respiratory symptoms from viral respiratory infections, including the SARS-CoV-2 infection, which can worsen the condition and necessitate hospitalization. However, the stabilizing cases of COVID-19 are expected to stabilize the growth of the market in the coming years. As per the weekly update by WHO in November 2021, after a 5-week drop, global COVID-19 cases stabilized last week, though deaths continued to decline. Cases were down in all but one of the six world regions, with the biggest drop in African countries (-35%). Thus, the COVID-19 pandemic had a considerable impact on the market.

Factors such as the growing burden of respiratory diseases and technological advancements in testing devices and modalities are expected to fuel the market growth over the forecast period.

Respiratory symptoms are among the leading causes of consultation with doctors and physicians in primary healthcare centers. Some of the major preventable chronic respiratory disorders are asthma, COPD, allergic rhinitis, sleep apnea, and tuberculosis (principally, multi-drug resistant tuberculosis). The data updated by the CDC in September 2022 mentioned that 873,000 emergency department visits with COPD were reported in 2020 in the United States, and 5% of adults were diagnosed with COPD,

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emphysema, or chronic bronchitis for the first time. Thus, it shows the burden of the disease on society is expected to increase the demand for respiratory disease testing, which is expected to boost the growth of the market.

In addition, development activities such as product launches, approvals, acquisitions, and mergers, among other activities, are driving the overall market growth. For instance, in November 2021, Cipla Limited launched Spirofy, India's first pneumotach-based portable, wireless Spirometer, on World COPD Day. With this launch, the company intends to revolutionize Obstructive Airway Disease (OAD) diagnosis in India. Such developments are anticipated to contribute to the market growth over the forecast period.

Therefore, due to the factors mentioned above, the studied market is anticipated to witness growth during the forecast period. However, the stringent regulatory framework for product approval is predicted to hinder the market growth.

Respiratory Disease Testing Market Trends

In-vitro Diagnostics Tests Segment is Expected to Witness Growth Over the Forecast Period

In-vitro diagnostics tests are expected to show steady growth in the respiratory disease testing market. The major contributing factor to segment growth is the shift from traditional diagnostics to advanced diagnostics. Additionally, factors such as the rising prevalence of respiratory diseases and the increasing use of point-of-care (POC) diagnostics for respiratory disease diagnosis are major factors that are anticipated to drive the segment's growth over the forecast period.

IVD involves medical devices and consumables that are utilized to perform in vitro tests on various biological samples. They are used to diagnose various medical conditions, such as respiratory diseases and respiratory tract infections, among other diseases. According to the article published in February 2022 by Frontiers in Cellular and Infection Microbiology, there is an increasing incidence of respiratory tract infections (RTI) worldwide. Thus, the demand for disease diagnosis has increased. Additionally, as per the source mentioned above, technologies like microfluidics have been developed to be integrated into rapid and specific diagnostic tools. Also, Lab-on-a-chip (LOC) technologies evolved from single-task-based analysis into advanced integrated systems for complex work. These technologies are advancing the IVD segment and creating a demand for the tests performed. Thereby expected to drive the segment growth.

Moreover, the developments in the segment are acting as major contributors to the market growth. For instance, in September 2021, Roche launched three molecular polymerase chain reaction (PCR) diagnostic test panels to simultaneously detect and differentiate common respiratory pathogens. Therefore, such advancements in the segment are expected to fuel segment growth.

Therefore, owing to the factors mentioned above, the segment is expected to witness growth over the forecast period.

North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

North America is one of the major contributors to the studied market, owing to increasing cases of COPD, asthma, and other respiratory tract infections (RTI) and growing geriatric populations prone to respiratory diseases.

The United States especially holds the largest share among the other countries in the region. According to the American Lung Association data updated in August 2022, COPD is a leading cause of disability in the United States, which affected more than 12.5 million people in 2021. Thus, COPD causes serious long-term disability and early death in the United States. This burden of the disease demand for availability of testing and diagnostics. Thereby driving the market growth.

Further, the data provided by Statistics Canada in September 2021 for health characteristics and annual estimates for asthma show an increase in 2020 from the previous years. The number of people affected by asthma increased to 2,802,700 in 2020. This

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burden of asthma in the country is expected to increase demand for early diagnosis of the disease. This is expected to drive the studied market growth in Canada, fueling the overall market growth in the region.

Moreover, major players in the market are focusing more on product innovation and development, collaborations, acquisitions, and mergers. For instance, in June 2022, BD (Becton, Dickinson, and Company) received CE marking for its BD MAX Respiratory Viral Panel (RVP), a new molecular diagnostic combination test for SARS-CoV-2, Influenza A + B, and Respiratory Syncytial Virus (RSV). The test uses a single nasal swab or a single nasopharyngeal swab sample to determine if a patient has COVID-19 or the flu, or RSV. This is expected to drive market growth in the region.

Therefore, owing to the aforesaid factors, North America is expected to dominate the market over the forecast period.

Respiratory Disease Testing Industry Overview

The respiratory disease testing market is fragmented. The major players in the market focus on continuous product development and offering innovative devices. Major market players are focused on continuous mergers and acquisitions to expand their market presence. A few of the major players in the market are Beckton Dickinson and Company, Koninklijke Philips N.V., ResMed Inc., Medtronic, Carestream Health, MG Diagnostic Corporation, Abbott, ThermoFisher Scientific, Biomerieux, QIAGEN, Seimens Healthineers AG, and F. Hoffmann-La Roche Ltd, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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