

Middle East and Africa In-Vitro Diagnostics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Middle East and Africa In-Vitro Diagnostics Market size is estimated at USD 4.52 billion in 2024, and is expected to reach USD 5.76 billion by 2029, growing at a CAGR of 4.95% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on the in-vitro diagnostics market since there was an increasing demand for IVD kits and reagents for the rapid and accurate diagnosis of SARS-CoV-2 virus infection among the regional population. As per the 2022 report from the United Nations, with the help of several initiatives, including the establishment of the Regional Centre of Excellence for Genomic Surveillance and Bioinformatics in South Africa in collaboration with the SANBI at the University of Western Cape, the WHO increased the number of laboratories able to detect COVID-19 from two to more than 900. WHO also supported genetic sequencing efforts in Africa. In comparison to a year ago, these efforts resulted in more than 7,500 samples in the southern African region, and the amount of sequencing data on the continent increased by more than 54%. The efforts implemented by the government and related resources stimulated the market growth for in-vitro diagnostics in the studied region amid the pandemic. However, as per the analysis, the demand for IVD products may observe a slight decline post pandemic phase owing to a reduction in the number of infected patients and a surge in the vaccination rate across the region.

The major driving factor linked to the growth of the IVD industry in the region is the high burden of chronic diseases, especially infectious diseases, diabetes, and cancers. The Middle East and Africa region is majorly affected due to the burden of chronic diseases. As per the 2021 report from the International Diabetes Federation (IDF), 24 million adults (20-79) are living with diabetes in the IDF Africa Region. This number is estimated to increase to 33 million by 2030 and 55 million by 2045. As per the same source, 73 million adults (20-79) were living with diabetes in the IDF Middle East and North Africa region in 2021. This number is estimated to increase to 95 million by 2030 and 136 million by 2045. The prime factor responsible for this rising burden is the lack of a proper healthcare system across African countries and low awareness about novel disease diagnosis techniques.

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As per the 2022 review report from UNAIDS, law reform in Angola enabled the country to make use of funds from the Global Fund to combat AIDS, tuberculosis, and malaria to reach young members of critical populations by making it easier for more young people to obtain HIV testing services.

Thus, due to this rise in chronic diseases, the Middle East & Africa In-Vitro Diagnostics market is expected to witness growth over the analysis period. However, stringent regulations associated with the products may restrain the market's growth.

Middle East and Africa In-Vitro Diagnosis & Treatment Market Trends

Diabetes Segment is Expected to Register High CAGR in the Application Segment

During the forecast period, the diabetes segment is expected to witness healthy growth. Factors such as the growing burden of diabetes, the increasing diagnosis of diabetes, and rising technological advancements in the field of diabetes are the main growth drivers of this segment.

For instance, as per the 2021 report from the African Union Development Agency (AUDA-NEPAD), the African High-Level Panel on Innovation and Emerging Technology (APET) was urging African nations to implement medical management technologies to enhance diabetic healthcare and lessen the burden of the condition. The strain of frequent hospital visits was lessened by the availability of more convenient and accessible healthcare solutions, which were supported by medical management technologies. Furthermore, according to the IDF Diabetes Atlas, 10th edition, published in 2021, an estimated 24 million adults aged 20-79 years were living with diabetes in the IDF Africa region, representing a regional prevalence of 4.5%. Moreover, 54% of people living with diabetes in the region are undiagnosed, the highest proportion of all IDF regions.

The IDF estimates that the increase in diabetes will be 33 million by 2030 and 55 million by 2045. This raises massive healthcare concerns, as all African countries are already struggling to cope with the diabetes burden. However, the WHO reports that diabetes in the region is a serious, chronic, and costly disease that is estimated to rise to 23.9 million cases by 2030.

Hence, the rising prevalence of the disease is expected to drive the growth of the diabetes segment over the forecast period.

GCC Region is Expected to Witness Growth Over The Forecast Period

The GCC in-vitro diagnostics market is expected to grow over the analysis period owing to the growing burden of chronic diseases and increasing healthcare expenditure, which is actively affecting the growth of the market.

The Kingdom of Saudi Arabia made a USD 150 million donations to Gavi, the Vaccine Alliance, in April 2020 to help in the organization's response to the COVID-19 pandemic. The funding was part of a USD 500 million package from the Kingdom of Saudi Arabia to support response to emergencies and preparedness efforts, the deployment of innovative diagnostics, treatments, and vaccinations, and the maintenance of adequate supplies of protective equipment for medical personnel. The government's actions during the pandemic were anticipated to boost the market growth.

Additionally, the COVID-19 pandemic in the GCC region helped the in-vitro diagnostics market grow. For instance, according to a study published in the Cardiovascular Diabetology Journal in December 2020, diabetes mellitus (DM) was the most common comorbidity among COVID-19-positive patients, with prevalence rates of 68.3%, hypertension of 42.6%, and obesity of 42.2%. Patients with COVID-19 who were hospitalized at King Khaled University Hospital (KKUH), Riyadh, Saudi Arabia, had a high prevalence of DM. The demand for in-vitro diagnostics among the patient population was increased by the high prevalence of COVID-19 patients and diabetes mellitus patients.

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Moreover, in July 2022, Saudi Arabia's Arabian International Healthcare Holding Company, TIBBIYAH, commenced a new joint venture (JV) with the Swiss company Unilabs Diagnostics AB. Likewise, in April 2022, the United Arab Emirates Sheikh Shakhbout Medical City (SSMC) became one of the first hospitals in the Middle East to launch a prominent point-of-care tool for antimicrobial management.

Therefore, owing to the aforementioned factors, it is anticipated that the studied market will witness growth over the analysis period.

Middle East and Africa In-Vitro Diagnosis & Treatment Industry Overview

The Middle East and Africa In-Vitro Diagnostics market is competitive and consists of several major players. In terms of market share, a few of the major players currently dominate the market in the GCC. Some of the major players in the market are Abbott Laboratories, BioMerieux SA, Sysmex Corporation, F. Hoffmann-La Roche AG, and Becton, Dickinson, and Company, among others. The companies mostly monitor distribution via their branch offices or distributors operating at the domestic and international levels.

Additional Benefits:

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

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