

Asia Pacific In-vitro Diagnostics Market Report and Forecast 2024-2032

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Report description:

Asia Pacific In-vitro Diagnostics Market Report and Forecast 2024-2032

The Asia Pacific in-vitro diagnostics market was valued at USD 22.8 billion in 2023. It is expected to grow at a CAGR of 5.7% during the period 2024-2032 and attain a market value of USD 37.6 billion by 2032.

Asia Pacific In-vitro Diagnostics Market Analysis

The Asia Pacific in-vitro diagnostics (IVD) market is experiencing substantial growth, driven by advancements in healthcare technology and the increasing prevalence of chronic and infectious diseases. In-vitro diagnostics involve medical tests conducted on samples such as blood, urine, and tissue to detect diseases, conditions, or infections. These tests play a critical role in early diagnosis, disease management, and treatment monitoring, making them indispensable in the healthcare sector.

Market Drivers

Rising Prevalence of Chronic Diseases: The increasing incidence of chronic diseases such as diabetes, cancer, and cardiovascular conditions is a major driver for the IVD market. Early diagnosis and regular monitoring are essential for managing these diseases, boosting the demand for diagnostic tests.

Technological Advancements: Continuous innovations in diagnostic technologies, such as molecular diagnostics, point-of-care testing, and next-generation sequencing, have enhanced the accuracy, efficiency, and accessibility of IVD tests. These advancements are propelling market growth by offering more reliable and faster results.

Growing Geriatric Population: The ageing population in the Asia Pacific region is significantly contributing to the demand for IVD tests. Older individuals are more susceptible to chronic diseases and infections, necessitating frequent diagnostic testing.

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Increased Healthcare Expenditure: Rising healthcare expenditure by governments and private sectors in countries like China, India, and Japan is improving healthcare infrastructure and accessibility. This investment is facilitating the adoption of advanced diagnostic tools and services.

COVID-19 Impact: The COVID-19 pandemic has highlighted the importance of robust diagnostic systems. The surge in demand for COVID-19 testing has accelerated the adoption of IVD technologies and expanded their applications beyond traditional settings.

Market Challenges

Regulatory Hurdles: The IVD market is highly regulated, with stringent approval processes for new diagnostic tests and technologies. Navigating these regulatory frameworks can be time-consuming and costly, posing a challenge for market players.

High Costs of Advanced Diagnostics: Despite technological advancements, the high costs associated with some IVD tests can limit their accessibility, particularly in low- and middle-income countries. This can hinder market growth in these regions.

Shortage of Skilled Professionals: The effective use of advanced diagnostic tools requires skilled healthcare professionals. A shortage of trained personnel can impede the adoption and utilisation of these technologies, affecting market expansion.

Data Privacy Concerns: The increasing use of digital technologies and data analytics in diagnostics raises concerns about data privacy and security. Ensuring the confidentiality and integrity of patient data is a critical challenge for the industry.

Future Opportunities

Expansion of Point-of-Care Testing: The demand for point-of-care testing (POCT) is expected to rise, driven by the need for rapid and accurate diagnostic results. POCT offers the advantage of immediate diagnosis and treatment, especially in remote and underserved areas.

Integration of Artificial Intelligence (AI): The integration of AI and machine learning in IVD can revolutionise diagnostics by enhancing accuracy, predicting disease outbreaks, and personalising treatment plans. AI-powered diagnostic tools can analyse large datasets and provide actionable insights, improving patient outcomes.

Growth in Telemedicine: The expansion of telemedicine and remote healthcare services is creating new opportunities for the IVD market. Remote diagnostic tools and home testing kits are becoming increasingly popular, providing convenient and timely healthcare solutions.

Emerging Markets: Developing countries in the Asia Pacific region present significant growth opportunities for the IVD market. Improving healthcare infrastructure, increasing healthcare awareness, and rising disposable incomes are driving the demand for diagnostic services in these markets.

Personalised Medicine: The shift towards personalised medicine, where treatments are tailored to individual patients based on their genetic profiles and specific conditions, is expected to boost the demand for specialised IVD tests. Personalised diagnostics can improve treatment efficacy and reduce adverse effects.

Asia Pacific In-vitro Diagnostics Market Trends

Adoption of Molecular Diagnostics: Molecular diagnostics, including polymerase chain reaction (PCR) and next-generation sequencing (NGS), are becoming increasingly prevalent due to their high sensitivity and specificity. These technologies are

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particularly valuable in detecting genetic disorders, infectious diseases, and cancer, driving their adoption across the Asia Pacific region.

Point-of-Care Testing (POCT) Growth: There is a significant shift towards point-of-care testing, which provides rapid and on-site diagnostic results. POCT devices are becoming more sophisticated and user-friendly, enabling healthcare providers to make quick decisions and improve patient outcomes. The convenience and efficiency of POCT are particularly beneficial in rural and remote areas with limited access to healthcare facilities.

Integration of Digital Health Technologies: The integration of digital health technologies, such as mobile health (mHealth) applications and wearable devices, is transforming the IVD landscape. These technologies facilitate remote monitoring and data collection, enabling continuous health assessment and timely interventions. Digital platforms also enhance patient engagement and adherence to treatment plans.

Personalised Medicine and Companion Diagnostics: The trend towards personalised medicine is driving the development of companion diagnostics, which are tests specifically designed to identify patients who are most likely to benefit from a particular therapeutic intervention. This approach ensures more effective and targeted treatments, improving patient outcomes and reducing healthcare costs.

Rise of Home Testing Kits: The demand for home testing kits has surged, particularly in the wake of the COVID-19 pandemic. These kits offer the convenience of self-testing and monitoring from the comfort of one's home, reducing the need for frequent hospital visits. Home testing is becoming increasingly popular for managing chronic conditions, infectious diseases, and preventive health.

Increased Focus on Infectious Disease Diagnostics: The ongoing threat of infectious diseases, including emerging and re-emerging pathogens, has heightened the focus on infectious disease diagnostics. The development of rapid, accurate, and cost-effective diagnostic tests for diseases such as COVID-19, dengue, and tuberculosis is a priority for the region.

Asia Pacific In-vitro Diagnostics Market Segmentation

Market Breakup by Product Type

Reagents and Kits

Instruments

Software and Services

The Asia Pacific in-vitro diagnostics (IVD) market is segmented into reagents and kits, instruments, and software and services. Reagents and kits dominate due to their extensive use in diagnostic tests, driven by the rising prevalence of chronic diseases. Instruments are witnessing growth due to technological advancements and the increasing adoption of automated systems. Software and services are expanding rapidly, fuelled by the integration of AI and data analytics, enhancing diagnostic accuracy and efficiency. These segments collectively propel market growth, with a forecasted increase due to advancements in technology, rising healthcare awareness, and a growing emphasis on early disease detection.

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Market Breakup by Technology

Immunoassay/ Immunochemistry

Clinical Chemistry?

Molecular Diagnostics

Haematology

Microbiology

Blood Glucose Self-Monitoring

Coagulation and Haemostasis

Urinalysis

Others

The Asia Pacific in-vitro diagnostics (IVD) market is segmented by technology into immunoassay/immunochemistry, clinical chemistry, molecular diagnostics, haematology, microbiology, blood glucose self-monitoring, coagulation and haemostasis, urinalysis, and others. Immunoassays and immunochemistry lead due to their widespread application in disease detection and monitoring. Molecular diagnostics is growing rapidly, driven by advancements in genetic testing and personalised medicine. Clinical chemistry and haematology benefit from routine use in hospitals and laboratories. Blood glucose self-monitoring sees significant demand due to rising diabetes prevalence. The growth in these technologies is poised to drive market expansion, emphasising technological innovation and improved healthcare outcomes.

Market Breakup by Therapeutic Area

Infectious Diseases

Diabetes

Cardiology

Oncology

Autoimmune Diseases

Nephrology

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Others

The Asia Pacific in-vitro diagnostics (IVD) market is segmented by therapeutic area into infectious diseases, diabetes, cardiology, oncology, autoimmune diseases, nephrology, and others. Infectious diseases dominate due to the ongoing need for rapid and accurate diagnostic tests, especially highlighted by the COVID-19 pandemic. Diabetes diagnostics see sustained demand driven by the high prevalence of the condition. Cardiology and oncology are experiencing growth due to advancements in biomarkers and personalised medicine approaches. Autoimmune diseases and nephrology segments are expanding as awareness and early diagnosis improve. These therapeutic areas collectively drive market growth, emphasising the importance of early and precise disease detection.

Market Breakup by End User

Hospitals

Laboratories

Homecare

Others

The Asia Pacific in-vitro diagnostics (IVD) market is segmented by end user into hospitals, laboratories, homecare, and others. Hospitals dominate due to the high volume of diagnostic tests performed in these settings, driven by the need for accurate and timely disease diagnosis. Laboratories also hold a significant share, benefiting from advancements in automation and high-throughput technologies. Homecare diagnostics are rapidly growing, spurred by the increasing preference for convenient and cost-effective home-based testing, particularly for chronic disease management. These end-user segments collectively propel market growth, with innovations in technology and a focus on patient-centric care driving future expansion.

Market Breakup by Country

China

Japan

India

ASEAN

Australia

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Others

The Asia Pacific in vitro diagnostics (IVD) market is segmented by country into China, Japan, India, ASEAN, Australia, and others. China leads due to its large population, increasing healthcare expenditure, and advancements in diagnostic technologies. Japan's market is driven by its ageing population and high prevalence of chronic diseases. India's growth is fuelled by improving healthcare infrastructure and rising awareness of early disease detection. The ASEAN region benefits from economic growth and increased investment in healthcare. Australia sees steady growth with technological adoption and robust healthcare systems. These countries collectively drive market expansion, emphasising innovation and improved healthcare access.

Asia Pacific In-vitro Diagnostics Market Competitive Landscape

The Asia Pacific in-vitro diagnostics (IVD) market is highly competitive, featuring key players such as Sysmex Corporation, Medical & Biological Laboratories Co., Ltd., Voxtur Bio Ltd., Immulab Pty Ltd, FUJIFILM Corporation, Hoffmann-La Roche Ltd., Abbott Laboratories, Carestream Health India Private Limited, Shimadzu Corporation, Thermo Fisher Scientific Inc., Beacon Diagnostics Pvt. Ltd., and Olympus Australia Pty. Ltd. Common market activities include mergers and acquisitions to enhance market share and expand portfolios, extensive research initiatives for innovative diagnostic solutions, frequent product introductions to meet evolving healthcare needs, and strategic partnerships to leverage technological advancements and expand geographical presence. These activities drive the competitive dynamics and growth of the Asia Pacific IVD market.

Key Questions Answered in the Report

What is the current and future performance of the Asia Pacific In-vitro Diagnostics market?

What are the main challenges facing the Asia Pacific In-vitro Diagnostics market?

What are the key drivers of the Asia Pacific In-vitro Diagnostics market?

What emerging trends are shaping the future of the Asia Pacific In-vitro Diagnostics market?

How is the trend towards personalised medicine influencing the development of companion diagnostics?

Why do reagents and kits dominate the IVD market, and how are instruments evolving?

How are molecular diagnostics, clinical chemistry, and haematology evolving in the IVD market?

What factors are driving the sustained demand for diabetes diagnostics?

Why do hospitals dominate the IVD market in terms of diagnostic test volumes?

Key Benefits for Stakeholders

The industry report offers a comprehensive quantitative analysis of various market segments, historical and current market trends, market forecasts, and dynamics of the Asia Pacific In-vitro Diagnostics market from 2017-2032.

The research report provides the latest information on the market drivers, challenges, and opportunities in the Asia Pacific In-vitro

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Diagnostics market.

The study maps the leading, as well as the fastest-growing, regional markets. It further enables stakeholders to identify the key country-level markets within each region.

Porter's five forces analysis assists stakeholders in assessing the impact of new entrants, competitive rivalry, supplier power, buyer power, and the threat of substitution. It helps stakeholders to analyze the level of competition within the Asia Pacific In-vitro Diagnostics industry and its attractiveness.

The competitive landscape allows stakeholders to understand their competitive environment and provides insight into the current positions of key players in the market.

Table of Contents:

- 1 Preface
- 1.1 Objectives of the Study
- 1.2 Key Assumptions
- 1.3 Report Coverage - Key Segmentation and Scope
- 1.4 Research Methodology
- 2 Executive Summary
- 3 In-vitro Diagnostics Market Overview
- 3.1 Global In-vitro Diagnostics Market
- 3.1.1 Global In-vitro Diagnostics Market Historical Value (2017-2023)
- 3.1.2 Global In-vitro Diagnostics Market Forecast Value (2024-2032)
- 3.2 Asia Pacific In-vitro Diagnostics Market
- 3.2.1 Asia Pacific In-vitro Diagnostics Market Historical Value (2017-2023)
- 3.2.2 Asia Pacific In-vitro Diagnostics Market Forecast Value (2024-2032)
- 4 Vendor Positioning Analysis
- 4.1 Key Vendors
- 4.2 Prospective Leaders
- 4.3 Niche Leaders
- 4.4 Disruptors
- 5 Asia Pacific In-vitro Diagnostics Market Landscape*
- 5.1 Asia Pacific In-vitro Diagnostics: Developers Landscape
- 5.1.1 Analysis by Year of Establishment
- 5.1.2 Analysis by Company Size
- 5.1.3 Analysis by Region
- 5.2 Asia Pacific In-vitro Diagnostics: Product Landscape
- 5.2.1 Analysis by Product Type
- 5.2.2 Analysis by Technology

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- 5.2.3□Analysis by Therapeutic Area
- 6□Asia Pacific In-vitro Diagnostics Market Dynamics
- 6.1□Market Drivers and Constraints
- 6.2□SWOT Analysis
- 6.2.1□Strengths
- 6.2.2□Weaknesses
- 6.2.3□Opportunities
- 6.2.4□Threats
- 6.3□PESTEL Analysis
- 6.3.1□Political
- 6.3.2□Economic
- 6.3.3□Social
- 6.3.4□Technological
- 6.3.5□Legal
- 6.3.6□Environment
- 6.4□Porter's Five Forces Model
- 6.4.1□Bargaining Power of Suppliers
- 6.4.2□Bargaining Power of Buyers
- 6.4.3□Threat of New Entrants
- 6.4.4□Threat of Substitutes
- 6.4.5□Degree of Rivalry
- 6.5□Key Demand Indicators
- 6.6□Key Price Indicators
- 6.7□Industry Events, Initiatives, and Trends
- 6.8□Value Chain Analysis
- 7□Asia Pacific In-vitro Diagnostics Market: Trade Data Analysis (HS Code- 38220090)
- 7.1□Major Exporting Countries
- 7.1.1□By Value
- 7.1.2□By Volume
- 7.2□Major Importing Countries
- 7.2.1□By Value
- 7.2.2□By Volume
- 8□Asia Pacific In-vitro Diagnostics Market Segmentation (2017-2032)
- 8.1□Asia Pacific In-vitro Diagnostics Market (2017-2032) by Product Type
- 8.1.1□Market Overview
- 8.1.2□Reagents and Kits
- 8.1.3□Instruments
- 8.1.4□Software and Services
- 8.2□Asia Pacific In-vitro Diagnostics Market (2017-2032) by Technology
- 8.2.1□Market Overview
- 8.2.2□Immunoassay/ Immunochemistry
- 8.2.3□Clinical Chemistry
- 8.2.4□Molecular Diagnostics
- 8.2.5□Haematology
- 8.2.6□Microbiology
- 8.2.7□Blood Glucose Self-Monitoring
- 8.2.8□Coagulation and Haemostasis

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- 8.2.9 Urinalysis
- 8.2.10 Others
- 8.3 Asia Pacific In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 8.3.1 Market Overview
 - 8.3.2 Infectious Diseases
 - 8.3.3 Diabetes
 - 8.3.4 Cardiology
 - 8.3.5 Oncology
 - 8.3.6 Autoimmune Diseases
 - 8.3.7 Nephrology
 - 8.3.8 Others
- 8.4 Asia Pacific In-vitro Diagnostics Market (2017-2032) by End User
 - 8.4.1 Market Overview
 - 8.4.2 Hospitals
 - 8.4.3 Laboratories
 - 8.4.4 Homecare
 - 8.4.5 Others
- 8.5 Asia Pacific In-vitro Diagnostics Market (2017-2032) by Country
 - 8.5.1 Market Overview
 - 8.5.2 China
 - 8.5.3 Japan
 - 8.5.4 India
 - 8.5.5 ASEAN
 - 8.5.6 Australia
 - 8.5.7 Others
- 9 China In-vitro Diagnostics Market Segmentation (2017-2032)
 - 9.1 China In-vitro Diagnostics Market (2017-2032) by Product Type
 - 9.1.1 Market Overview
 - 9.1.2 Reagents and Kits
 - 9.1.3 Instruments
 - 9.1.4 Software and Services
 - 9.2 China In-vitro Diagnostics Market (2017-2032) by Technology
 - 9.2.1 Market Overview
 - 9.2.2 Immunoassay/ Immunochemistry
 - 9.2.3 Clinical Chemistry
 - 9.2.4 Molecular Diagnostics
 - 9.2.5 Haematology
 - 9.2.6 Microbiology
 - 9.2.7 Blood Glucose Self-Monitoring
 - 9.2.8 Coagulation and Haemostasis
 - 9.2.9 Urinalysis
 - 9.2.10 Others
 - 9.3 China In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 9.3.1 Market Overview
 - 9.3.2 Infectious Diseases
 - 9.3.3 Diabetes
 - 9.3.4 Cardiology

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- 9.3.5□Oncology
- 9.3.6□Autoimmune Diseases
- 9.3.7□Nephrology
- 9.3.8□Others
- 9.4□China In-vitro Diagnostics Market (2017-2032) by End User
 - 9.4.1□Market Overview
 - 9.4.2□Hospitals
 - 9.4.3□Laboratories
 - 9.4.4□Homecare
 - 9.4.5□Others
- 10□Japan In-vitro Diagnostics Market Segmentation (2017-2032)
 - 10.1□Japan In-vitro Diagnostics Market (2017-2032) by Product Type
 - 10.1.1□Market Overview
 - 10.1.2□Reagents and Kits
 - 10.1.3□Instruments
 - 10.1.4□Software and Services
 - 10.2□Japan In-vitro Diagnostics Market (2017-2032) by Technology
 - 10.2.1□Market Overview
 - 10.2.2□Immunoassay/ Immunochemistry
 - 10.2.3□Clinical Chemistry
 - 10.2.4□Molecular Diagnostics
 - 10.2.5□Haematology
 - 10.2.6□Microbiology
 - 10.2.7□Blood Glucose Self-Monitoring
 - 10.2.8□Coagulation and Haemostasis
 - 10.2.9□Urinalysis
 - 10.2.10□Others
 - 10.3□Japan In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 10.3.1□Market Overview
 - 10.3.2□Infectious Diseases
 - 10.3.3□Diabetes
 - 10.3.4□Cardiology
 - 10.3.5□Oncology
 - 10.3.6□Autoimmune Diseases
 - 10.3.7□Nephrology
 - 10.3.8□Others
 - 10.4□Japan In-vitro Diagnostics Market (2017-2032) by End User
 - 10.4.1□Market Overview
 - 10.4.2□Hospitals
 - 10.4.3□Laboratories
 - 10.4.4□Homecare
 - 10.4.5□Others
- 11□India In-vitro Diagnostics Market Segmentation (2017-2032)
 - 11.1□India In-vitro Diagnostics Market (2017-2032) by Product Type
 - 11.1.1□Market Overview
 - 11.1.2□Reagents and Kits
 - 11.1.3□Instruments

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- 11.1.4□Software and Services
- 11.2□India In-vitro Diagnostics Market (2017-2032) by Technology
 - 11.2.1□Market Overview
 - 11.2.2□Immunoassay/ Immunochemistry
 - 11.2.3□Clinical Chemistry
 - 11.2.4□Molecular Diagnostics
 - 11.2.5□Haematology
 - 11.2.6□Microbiology
 - 11.2.7□Blood Glucose Self-Monitoring
 - 11.2.8□Coagulation and Haemostasis
 - 11.2.9□Urinalysis
 - 11.2.10□Others
- 11.3□India In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 11.3.1□Market Overview
 - 11.3.2□Infectious Diseases
 - 11.3.3□Diabetes
 - 11.3.4□Cardiology
 - 11.3.5□Oncology
 - 11.3.6□Autoimmune Diseases
 - 11.3.7□Nephrology
 - 11.3.8□Others
- 11.4□India In-vitro Diagnostics Market (2017-2032) by End User
 - 11.4.1□Market Overview
 - 11.4.2□Hospitals
 - 11.4.3□Laboratories
 - 11.4.4□Homecare
 - 11.4.5□Others
- 12□ASEAN In-vitro Diagnostics Market Segmentation (2017-2032)
 - 12.1□ASEAN In-vitro Diagnostics Market (2017-2032) by Product Type
 - 12.1.1□Market Overview
 - 12.1.2□Reagents and Kits
 - 12.1.3□Instruments
 - 12.1.4□Software and Services
 - 12.2□ASEAN In-vitro Diagnostics Market (2017-2032) by Technology
 - 12.2.1□Market Overview
 - 12.2.2□Immunoassay/ Immunochemistry
 - 12.2.3□Clinical Chemistry
 - 12.2.4□Molecular Diagnostics
 - 12.2.5□Haematology
 - 12.2.6□Microbiology
 - 12.2.7□Blood Glucose Self-Monitoring
 - 12.2.8□Coagulation and Haemostasis
 - 12.2.9□Urinalysis
 - 12.2.10□Others
 - 12.3□ASEAN In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 12.3.1□Market Overview
 - 12.3.2□Infectious Diseases

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- 12.3.3 Diabetes
- 12.3.4 Cardiology
- 12.3.5 Oncology
- 12.3.6 Autoimmune Diseases
- 12.3.7 Nephrology
- 12.3.8 Others
- 12.4 ASEAN In-vitro Diagnostics Market (2017-2032) by End User
 - 12.4.1 Market Overview
 - 12.4.2 Hospitals
 - 12.4.3 Laboratories
 - 12.4.4 Homecare
 - 12.4.5 Others
- 13 Australia In-vitro Diagnostics Market Segmentation (2017-2032)
 - 13.1 Australia In-vitro Diagnostics Market (2017-2032) by Product Type
 - 13.1.1 Market Overview
 - 13.1.2 Reagents and Kits
 - 13.1.3 Instruments
 - 13.1.4 Software and Services
 - 13.2 Australia In-vitro Diagnostics Market (2017-2032) by Technology
 - 13.2.1 Market Overview
 - 13.2.2 Immunoassay/ Immunochemistry
 - 13.2.3 Clinical Chemistry
 - 13.2.4 Molecular Diagnostics
 - 13.2.5 Haematology
 - 13.2.6 Microbiology
 - 13.2.7 Blood Glucose Self-Monitoring
 - 13.2.8 Coagulation and Haemostasis
 - 13.2.9 Urinalysis
 - 13.2.10 Others
 - 13.3 Australia In-vitro Diagnostics Market (2017-2032) by Therapeutic Area
 - 13.3.1 Market Overview
 - 13.3.2 Infectious Diseases
 - 13.3.3 Diabetes
 - 13.3.4 Cardiology
 - 13.3.5 Oncology
 - 13.3.6 Autoimmune Diseases
 - 13.3.7 Nephrology
 - 13.3.8 Others
 - 13.4 Australia In-vitro Diagnostics Market (2017-2032) by End User
 - 13.4.1 Market Overview
 - 13.4.2 Hospitals
 - 13.4.3 Laboratories
 - 13.4.4 Homecare
 - 13.4.5 Others
- 14 Regulatory Framework
 - 14.1 Regulatory Overview
 - 14.2 National Medical Products Administration (NMPA, China)

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- 14.3 CDSCO (India)
- 15 Patent Analysis
 - 15.1 Analysis by Type of Patent
 - 15.2 Analysis by Publication Year
 - 15.3 Analysis by Issuing Authority
 - 15.4 Analysis by Patent Age
 - 15.5 Analysis by CPC Analysis
 - 15.6 Analysis by Patent Valuation
 - 15.7 Analysis by Key Players
- 16 Strategic Initiative
 - 16.1 Analysis by Partnership Instances
 - 16.2 Analysis by Type of Partnership
 - 16.3 Analysis by Leading Players
 - 16.4 Analysis by Geography
- 17 Supplier Landscape
 - 17.1 Market Share Analysis, By Region (Top 5 Companies)
 - 17.1.1 Market Share Analysis: Asia Pacific
 - 17.2 Sysmex Corporation
 - 17.2.1 Financial Analysis
 - 17.2.2 Product Portfolio
 - 17.2.3 Demographic Reach and Achievements
 - 17.2.4 Mergers and Acquisitions
 - 17.2.5 Certifications
 - 17.3 Medical & Biological Laboratories Co., Ltd .
 - 17.3.1 Financial Analysis
 - 17.3.2 Product Portfolio
 - 17.3.3 Demographic Reach and Achievements
 - 17.3.4 Mergers and Acquisitions
 - 17.3.5 Certifications
 - 17.4 Voxtur Bio Ltd .
 - 17.4.1 Financial Analysis
 - 17.4.2 Product Portfolio
 - 17.4.3 Demographic Reach and Achievements
 - 17.4.4 Mergers and Acquisitions
 - 17.4.5 Certifications
 - 17.5 Immulab Pty Ltd
 - 17.5.1 Financial Analysis
 - 17.5.2 Product Portfolio
 - 17.5.3 Demographic Reach and Achievements
 - 17.5.4 Mergers and Acquisitions
 - 17.5.5 Certifications
 - 17.6 FUJIFILM Corporation
 - 17.6.1 Financial Analysis
 - 17.6.2 Product Portfolio
 - 17.6.3 Demographic Reach and Achievements
 - 17.6.4 Mergers and Acquisitions
 - 17.6.5 Certifications

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- 17.7□ Hoffmann-La Roche Ltd .
 - 17.7.1□ Financial Analysis
 - 17.7.2□ Product Portfolio
 - 17.7.3□ Demographic Reach and Achievements
 - 17.7.4□ Mergers and Acquisitions
 - 17.7.5□ Certifications
 - 17.8□ Abbott Laboratories
 - 17.8.1□ Financial Analysis
 - 17.8.2□ Product Portfolio
 - 17.8.3□ Demographic Reach and Achievements
 - 17.8.4□ Mergers and Acquisitions
 - 17.8.5□ Certifications
 - 17.9□ Carestream Health India Private Limited
 - 17.9.1□ Financial Analysis
 - 17.9.2□ Product Portfolio
 - 17.9.3□ Demographic Reach and Achievements
 - 17.9.4□ Mergers and Acquisitions
 - 17.9.5□ Certifications
 - 17.10□ Shimadzu Corporation
 - 17.10.1□ Financial Analysis
 - 17.10.2□ Product Portfoliozz
 - 17.10.3□ Demographic Reach and Achievements
 - 17.10.4□ Mergers and Acquisitions
 - 17.10.5□ Certifications
 - 17.11□ Thermo Fisher Scientific Inc .
 - 17.11.1□ Financial Analysis
 - 17.11.2□ Product Portfolio
 - 17.11.3□ Demographic Reach and Achievements
 - 17.11.4□ Mergers and Acquisitions
 - 17.11.5□ Certifications
 - 17.12□ Beacon Diagnostics Pvt. Ltd .
 - 17.12.1□ Financial Analysis
 - 17.12.2□ Product Portfolio
 - 17.12.3□ Demographic Reach and Achievements
 - 17.12.4□ Mergers and Acquisitions
 - 17.12.5□ Certifications
 - 17.13□ Olympus Australia Pty. Ltd
 - 17.13.1□ Financial Analysis
 - 17.13.2□ Product Portfolio
 - 17.13.3□ Demographic Reach and Achievements
 - 17.13.4□ Mergers and Acquisitions
 - 17.13.5□ Certifications
- 18□ Asia Pacific In-vitro Diagnostics Market - Distribution Model (Additional Insight)
 - 18.1□ Overview
 - 18.2□ Potential Distributors
 - 18.3□ Key Parameters for Distribution Partner Assessment

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19 □ Key Opinion Leaders (KOL) Insights (Additional Insight)

*Additional insights provided are customisable as per client requirements.

* The coverage of the Market Landscape section depends on the data availability and may cover a minimum of 80% of the total market. The EMR team strives to make this section as comprehensive as possible.

**The supplier list is not exhaustive. Moreover, we can provide analysis of companies as per custom requests.

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