In Vitro Diagnostics - A Global Market Overview

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Report description:

Global In Vitro Diagnostics (IVD) Market Trends and Outlook
In Vitro Diagnostics (IVD) refers to medical tests conducted on biological samples, such as blood, urine, or tissue, outside the human body to detect diseases, monitor health conditions, and guide treatment decisions. The Latin term "in vitro" translates to "in glass," indicating that these tests are performed using equipment like test tubes or more advanced laboratory devices, unlike in vivo tests, which occur inside the body. IVDs are essential in healthcare, providing precise and timely information for diagnosing conditions, tracking disease progression, and identifying suitable therapies. These tests can be conducted in various settings, including hospitals, clinical laboratories, healthcare facilities, and at home. IVD technologies encompass a range of technologies, such as molecular diagnostics, immunoassays, clinical chemistry, hematology, and microbiology, and are used to detect infections, manage chronic conditions, monitor genetic disorders, and support personalized medicine. By enabling accurate clinical decision-making, IVD plays a pivotal role in improving patient outcomes and supporting the healthcare system.

Global In Vitro Diagnostics (IVD) market size is estimated at US$83.3 billion in 2024 and projected to post a CAGR of 5.6% between 2024 and 2030 to reach US$115.7 billion in 2030. The global In Vitro Diagnostics (IVD) market growth is driven by several factors. The increasing incidence of chronic, genetic, cardiovascular, and neurological diseases places a considerable burden on healthcare systems, creating a need for efficient diagnostic tools.

Early disease detection, supported by IVD, plays a crucial role in preventing disease progression and minimizing complex treatments, enhancing healthcare outcomes while reducing costs. Government initiatives, such as the WHO's Essential In Vitro Diagnostics List (EDL), promote the widespread adoption of IVDs. The market is also benefitting from the integration of Smart Labs-as-a-Service, which automates laboratory workflows, improves efficiency, reduces human error, and enhances diagnostic accuracy, particularly in smaller labs with budget constraints. Additionally, Point-of-Care Testing (POCT) is expanding, driven by the need for quick, localized diagnostics, particularly following the COVID-19 pandemic. The shift toward personalized medicine further fuels the demand for complex diagnostic technologies, enabling real-time patient data and customized treatment decisions. These trends, combined with increasing product launches, regulatory approvals, and technological advancements, are accelerating the growth of the IVD market.

In Vitro Diagnostics (IVD) Regional Market Analysis

North America leads the global In Vitro Diagnostics (IVD) market, capturing a share of 42.2% in 2024. This dominance is driven by the rising prevalence of chronic and infectious diseases, increased awareness of early diagnosis, and the adoption of advanced diagnostic products. Additionally, the region benefits from a robust healthcare infrastructure, significant investments in IVD technologies, and a strong commitment to innovation that further supports its market leadership. The United States and Canada are key contributors, as the demand for personalized medicine and point-of-care testing continues to drive market growth. In contrast, the Asia-Pacific region is expected to experience the fastest CAGR of 6.9% from 2024 to 2030. This growth can be attributed to improvements in healthcare infrastructure, the increasing prevalence of chronic diseases, and the growing adoption of advanced diagnostic technologies in countries like India, China, and Japan. Efforts to enhance healthcare access, raise awareness, and increase healthcare spending will further propel IVD market growth in the Asia-Pacific region.

In Vitro Diagnostics (IVD) Market Analysis by Product
The IVD market is segmented into reagents & kits, instruments, and software and services. Among these, the reagents and kits segment dominates, capturing a 65.5% share in 2024 and experiencing the fastest growth with a CAGR of 5.9% during the forecast period 2024-2030. This growth is driven by increased R&D in innovative reagents, cancer detection, and precision medicine. Additionally, the rising incidence of chronic and infectious diseases, demand for self-testing kits, and advancements in molecular diagnostics and point-of-care testing contribute to the expansion of this segment. Reagents play a critical role in diagnostics by interacting with biological markers, and their broad application in various tests further supports growth. The instruments segment holds the second-largest market share, driven by advances in automated diagnostic equipment and high-throughput testing.

In Vitro Diagnostics (IVD) Market Analysis by Technology
The IVD market is segmented into immunoassays, molecular diagnostics, clinical chemistry, hematology, microbiology, coagulation testing, urinalysis, and other IVD technologies. The immunoassays segment holds the largest market share, estimated at 28.3% in 2024, due to their precision and versatility in identifying infections, cancers, and chronic conditions. The increasing prevalence of chronic and communicable diseases, along with the rising demand for early diagnosis, drives the use of immunological techniques like enzyme-linked immunosorbent assays (ELISA). Meanwhile, the molecular diagnostics segment is projected to register the fastest CAGR of 6.5% from 2024 to 2030, driven by the rising incidence of chronic and infectious diseases. Advances in sequencing technologies, higher healthcare expenditure, and a growing preference for personalized medicine all contribute to the expansion of molecular diagnostics, which play a crucial role in managing genetic and infectious conditions. Additionally, the development of advanced diagnostic tools, such as PCR and next-generation sequencing, further supports the growth of this segment.

In Vitro Diagnostics (IVD) Market Analysis by Application
The IVD market is segmented into infectious diseases, oncology, cardiology, diabetes, autoimmune disorders, nephrology, drug testing, and various other applications. The infectious diseases segment dominates the market with a 29.3% estimated share in 2024, spurred by the increasing occurrence of diseases such as HIV, tuberculosis, and influenza, as well as a growing elderly population who are more vulnerable to these infections. The growth of this segment is supported by government initiatives, the availability of rapid diagnostic tests, and extensive screening efforts. Conversely, the oncology segment is anticipated to experience rapid growth, with a CAGR of 6.6% during the forecast period, driven by the rising incidence of cancer, advancements in biomarker research, and growing demand for personalized treatments. Increased government funding, awareness, and technological progress in cancer diagnostics further fuel the segment's expansion.

In Vitro Diagnostics (IVD) Market Analysis by End-User
The IVD market is segmented into hospitals, clinical laboratories, home care settings, and other end-users. The hospital segment dominates with a 40.4% share of the market in 2024, supported by high patient volumes, the demand for precise diagnostics, and widespread testing for multiple health conditions. Hospitals are continually investing in advanced diagnostic technologies to enhance patient outcomes and optimize operations, underscoring their vital importance in healthcare delivery. The increasing

focus on early diagnosis and the growing integration of electronic health records (EHR) are additional factors bolstering this segment's dominance. On the other hand, the home care settings segment is projected to record the fastest CAGR of 7.3% from 2024 to 2030, driven by an aging population and a rising need for home-based IVD devices, particularly molecular diagnostics and immunoassays for personal testing. The increasing preference for at-home testing, owing to its convenience and technological advancements, is rapidly enhancing the uptake of IVD solutions in home care settings.

In Vitro Diagnostics (IVD) Market Report Scope
This global report on In Vitro Diagnostics (IVD) analyzes the global and regional markets based on product, technology, application, and end-user for the period 2021-2030 with projections from 2024 to 2030 in terms of value in US$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics
Historical Period:□□2021-2023
Base Year:□□2024
Forecast Period:□□2024-2030
Units:□□Value market in US$
Companies Mentioned:□□15+

In Vitro Diagnostics (IVD) Market by Geographic Region
?□North America (The United States, Canada, and Mexico)
?□Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)
?□Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)
?□South America (Brazil, Argentina, and Rest of South America)
?□Rest of World

In Vitro Diagnostics (IVD) Market by Product
?□Reagents & Kits
?□Instruments
?□Software and Services

In Vitro Diagnostics (IVD) Market by Technology
?□Immunoassay
?□Molecular Diagnostics
?□Clinical Chemistry
?□Hematology
?□Microbiology
?□Coagulation Testing
?□Urinalysis
?□Other IVD Technologies (Including Chromatography & Mass Spectrometry, Flow Cytometry, Electrochemical Biosensors, Diabetes Testing, and others)

In Vitro Diagnostics (IVD) Market by Application
?□Infectious Diseases
?□Oncology
?□Cardiology
?□Diabetes

? Autoimmune Disorders
? Nephrology
? Drug Testing
? Other Applications (Including Pregnancy Testing, Genetic Testing, Endocrinology, Gastroenterology, Allergy Diagnostics, Bone & Mineral Disorders, and others)

In Vitro Diagnostics (IVD) Market by End-user
? Hospitals
? Clinical Laboratories
? Home Care Settings
? Other End-Users (Including Physicians Offices, Urgent Care Centers, Ambulatory Surgical Centers (ASCs), Academic and Research Institutes, and others)

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- DiaSorin SpA
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