

Global Urinalysis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Global Urinalysis Market is expected to register a CAGR of 7.5% during the forecast period.

The outbreak of COVID-19 impacted the urinalysis market, as hospitals and healthcare services restricted services due to social distancing measures. The unprecedented increase in coronavirus-infected patients reduced access to other primary care services and resulted in a significant drop in non-COVID-19-related diagnoses, such as urinary tract infections or kidney diseases. For instance, according to a research article published in the International Journal of Surgery in July 2021, during the COVID-19 pandemic, urological procedures delayed or postponed included urinary tract infections, stress incontinence, overactive bladder (OAB), and neurogenic bladder. Similarly, according to a December 2021 study published in the ADIAN Journal, fewer patients adopted primary care services, and fewer diagnoses were done, including UTIs. The source also reports that between March 30 and April 24, 2020, the weekly rate of UTI diagnosis per 100,000 population fell from an average of 30-35 to less than 10 in England. Since April, the rate has risen by 50% of the usual rate. Thus, the market witnessed an adverse impact during the pandemic. However, with the ease of restrictions and declining cases of COVID-19, the market started to gain momentum and is expected to continue the upward trend over the forecast period.

The higher burden of chronic diseases such as diabetes and chronic kidney diseases and the rising adaptation of point-of-care testing is expected to be the major contributing factors to the market growth. Urinary tract infection refers to an infection in any part of the urinary system. For instance, as per a December 2021 update by the International Diabetes Federation (IDF), in 2021, approximately 537.0 million adults (20-79 years) had diabetes, which is projected to rise to 643.0 million by 2030 and 783.0 million by 2045. As per the same source, 3 in 4 adults with diabetes live in low- and middle-income countries and almost 1 in 2 (240 million) of them are undiagnosed. The source also reports that diabetes caused 6.7 million deaths in 2021. To identify the glucose level in diabetic people, urine analysis has proven to be an important test.

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Furthermore, increasing cases of chronic kidney diseases across the globe are also expected to propel market growth over the forecast period. For instance, chronic kidney disease (CKD) is a condition that causes reduced kidney function over some time. It may develop over many years and lead to end-stage kidney (or renal) disease (ESRD). It has become an enormous public health issue. For instance, as per the 2021 report by the CDC, more than 15.0% of adults in the United States, amounting to approximately 37.0 million people, were estimated to have CKD. Similarly, in 2021, as per data released on World Kidney Day, a joint initiative of the International Society of Nephrology (ISN) and the International Federation of Kidney Foundations (IFKF), kidney disease affected around 850.0 million people globally. The same source also reported that one in ten adults has chronic kidney disease (CKD). The global burden of CKD is continuously increasing and is projected to become the 5th most common cause of years of life lost globally by 2040.

While the market is poised for growth, stringent regulatory frameworks related to urinalysis may hinder market growth over the forecast period.

Urinalysis Market Trends

The Pregnancy & Fertility Segment is Expected to Witness Considerable Segment Growth Over the Forecast Period

A urine test can be used to diagnose diabetes, dehydration, kidney or bladder infections, and preeclampsia. High sugar levels may be a sign of gestational diabetes, which may appear around week 20 of pregnancy. Human chorionic gonadotropin (hCG), a unique hormone that only arises in a woman's body during pregnancy, is what pregnancy tests seek. These tests can check for hCG in the blood or urine. Home urine tests for pregnancy are affordable and often used. Home pregnancy tests are fairly accurate when done correctly.

The increasing use of urinalysis for pregnancy and fertility detection is anticipated to propel segment growth. Several studies have been conducted to understand the accuracy of urinalysis in judging pregnancy. For instance, an article published in September 2021 by the National Institute of Health stated that, in general, there are two possible causes for a patient to have an erroneously negative Urine Pregnancy Test (UPT). Early pregnancy cases are where a patient may not produce enough human chorionic gonadotropin (hCG) to result in a positive test. A threshold that allegedly ranges from 15 to 100 mIU/mL represents the first and most likely scenario. Secondly, the circumstance that may be more worrisome is patients who are farther along in their pregnancy and suffer the "hook effect," which is when elevated or excessive amounts of hCG overwhelm the urinary pregnancy test and cause a false negative. Despite the certain cases where urine tests provide negative results, it is considered as the first line of diagnosis for pregnancy. Furthermore, continuous new launches of pregnancy tests by key players are also expected to augment the segment growth. For instance, in April 2022, Mankind Pharma launched a rapid-testing pregnancy device that is used for urinalysis to confirm pregnancy.

North America is Expected to Hold a Significant Share Over the Forecast Period

North America is expected to hold a major market share in the global urinalysis market due to the increasing aging population and higher prevalence of chronic kidney diseases. Chronic kidney disease is associated with kidney failure. According to 2021 data published by the National Kidney Foundation, chronic kidney disease causes more death than breast cancer and prostate cancer. The same source also stated that around 37.0 million people are affected by it. It is more prevalent in an older population, affecting approximately 15.0% of the adult population. Hence, the need for proper diagnosis and treatment of chronic kidney diseases in the region is expected to propel the demand for urinalysis.

Key product launches, high concentration of market players or manufacturers' presence, acquisitions and partnerships among major players, and rising cases of UTIs and chronic kidney diseases in the United States are some of the factors driving the growth

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of the urinalysis market in the country. For instance, as per an article published by the NCBI in November 2021, the prevalence of uncomplicated urinary tract infections is high, and an estimated 40% of women in the United States are likely to develop a Urinary Tract Infection (UTI) during their lifetime. Furthermore, the World Population Ageing Report 2020 stated that, in the United States, the number of people aged above 65 is projected to reach 84,813 thousand by 2030 and the 65-and-older age group's share in the total population may rise from 16.2% in 2021 to 22.4% by 2050. The prevalence of urological disorders increases with age, owing to which the increasing geriatric population is also expected to propel the market growth in the country.

Urinalysis Industry Overview

The urinalysis market is moderately competitive due to the presence of a few players operating globally as well as regionally. Companies are taking strategic initiatives to grow their presence in the urinalysis market. Currently, some of the major players include Cardinal Health Inc., Alere (Abbott Laboratories), Beckman Coulter Inc., Siemens Healthineers, Roche Diagnostics, Sysmex Corporation, Bio-Rad Laboratories Inc., Arkray Inc., Acon Laboratories Inc., Becton, Dickinson, and Company among others.

Additional Benefits:

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

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