

In-Vitro Diagnostics Market Report and Forecast 2025-2034

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Report description:

The global in vitro diagnostics market was valued at USD 81.78 Billion in 2024, driven by the increasing demand for advanced diagnostic facilities across the globe. The market is anticipated to grow at a CAGR of 6.20% during the forecast period of 2025-2034 to achieve a value of USD 149.24 Billion by 2034.

The in vitro diagnostics (IVD) market is experiencing significant momentum, driven by continuous innovations and a rising global burden of chronic diseases and infectious diseases. These factors are fuelling diagnostic market growth, as the demand for accurate, timely, and non-invasive diagnostic procedures intensifies. Increasing adoption of point-of-care testing and automated analyzers in both hospitals and clinical laboratories has made diagnostic processes more efficient and accessible, enabling quicker early disease detection and better disease management. Healthcare systems worldwide are increasingly integrating IVD technologies to support personalized medicine, aiming to tailor treatments for individual patients based on specific biomarkers and disease profiles.

Moreover, the shift towards prevention strategies is prompting healthcare providers to rely more heavily on diagnostic testing to identify risks before symptoms emerge, thereby improving patient outcomes. From monitoring blood glucose levels to screening for cancer and infectious agents, IVD is a cornerstone of modern medicine. The convergence of digital health tools with diagnostics is also enhancing data interpretation and care decisions. As the demand for cost-effective and efficient testing solutions continues to rise, the in vitro diagnostics market is poised for strong growth, offering substantial opportunities for innovation and transformation across the global healthcare landscape.

Global In Vitro Diagnostics Market Dynamics

DRIVER: Rising Elderly Population Driving Chronic and Infectious Disease Prevalence

The growing global geriatric population significantly contributes to the rising incidence of chronic and infectious diseases, thereby driving demand for in vitro diagnostics (IVD). Ageing individuals are more prone to conditions such as diabetes, cancer,

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cardiovascular, and respiratory disorders, all requiring continuous monitoring and early detection. For instance, in January 2025, Beckman Coulter Diagnostics launched new Research Use Only (RUO) blood-based biomarker immunoassays for neurodegenerative disease research, targeting p-Tau217, GFAP, NFL, and APOE ɛ4, crucial biomarkers for advancing age-related diagnostics. With immunosenescence increasing infection risks, precise diagnostic tools are essential. This surge in demand, supported by healthcare awareness and accessibility, reinforces IVD technologies' role in personalised, preventive care across ageing populations.

RESTRAINT: Limited Reimbursement Structures Hindering Market Expansion

One of the primary constraints affecting the IVD market is the presence of unfavourable reimbursement policies across several regions. Many healthcare systems lack comprehensive coverage for advanced diagnostic tests, including molecular diagnostics and genetic testing, limiting patient access and reducing the incentive for providers to adopt such technologies. As a result, despite innovations in IVD technologies, uptake may remain subdued due to affordability concerns. In low and middle-income regions, reimbursement challenges are even more pronounced, affecting investments in clinical laboratories and discouraging widespread deployment of automated analyzers or point-of-care testing. Inconsistent policy frameworks, varying payer perspectives on test necessity, and frequent delays in approval for coverage further compound the issue. This regulatory and financial uncertainty acts as a barrier to diagnostic market growth, particularly for tests that are essential in early detection and personalised medicine. Addressing these limitations through policy reform and broader reimbursement inclusion is crucial to realising the full potential of in vitro diagnostics in enhancing patient outcomes and reducing long-term treatment costs.

OPPORTUNITY: Untapped Potential in Developing Regions Boosting Future Growth

The market is witnessing lucrative expansion possibilities in emerging markets due to rising healthcare expenditure, improved diagnostic infrastructure, and growing awareness of non-invasive diagnostic procedures. Countries across Asia Pacific, Latin America, and Middle East and Africa are seeing increased demand for point-of-care testing, driven by high rates of infectious and chronic diseases. For instance, in January 2025, GHIT Fund invested USD 4.2 million in developing a leishmaniasis diagnostic tool, highlighting such global efforts. Government-led health screening programmes and growing collaborations between global firms and local providers enhance diagnostic access in underserved areas. These regions also benefit from mobile diagnostics, digital health solutions, and growing clinical laboratory capacity. The focus on personalised medicine and IVD technologies tailored to regional health needs is fostering inclusive, sustainable market growth.

CHALLENGE: Operational Complexities Creating Market Limitations

Despite rapid technological advancements, the IVD market faces notable operational barriers that impede widespread adoption. Challenges include high equipment costs, the need for skilled technicians, strict regulatory compliance, and complex sample handling protocols, especially in decentralised settings. Healthcare providers in smaller clinics or rural locations may lack the necessary infrastructure to deploy advanced IVD technologies or maintain automated analyzers, leading to delays in test results or limited access. Integration with electronic health records, interoperability issues, and quality assurance compliance further complicate implementation. These operational hurdles restrict the market's ability to fully capitalise on innovations in early disease detection, especially in homecare or resource-limited settings, and must be addressed for long-term scalability.

Global In Vitro Diagnostics Market Ecosystem Analysis

The global in vitro diagnostics (IVD) market ecosystem is shaped by a complex network of diagnostic developers, laboratory service providers, healthcare institutions, and regulatory authorities. This ecosystem functions collaboratively to ensure timely diagnosis, effective disease management, and patient-centric care. Technological advancements, increased awareness of personalised medicine, and rising disease prevalence continue to strengthen this network. The adoption of automated systems

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and digital connectivity is further streamlining workflows, optimising testing efficiency, and enabling faster clinical decisions across diverse healthcare settings.

Blood, Serum, and Plasma Samples to Dominate the IVD Specimen Segment

Blood, serum, and plasma emerged as the most commonly used specimens in the in vitro diagnostics industry due to their high reliability and ease of collection. These biological samples allow accurate assessment of a wide range of diseases including infectious, metabolic, and autoimmune disorders. Their compatibility with various diagnostic platforms, such as immunoassays and molecular tests, makes them highly suitable for both routine screenings and advanced investigations. The segment's dominance is also driven by the increasing demand for non-invasive testing, rising prevalence of chronic conditions, and continuous advancements in biomarker-based diagnostics.

Hospitals and Clinics to Lead the End Users Segment of IVD Solutions

Hospitals and clinics held the largest market share in the IVD sector, as they serve as the primary centres for patient diagnosis, monitoring, and treatment. Their extensive infrastructure, access to trained personnel, and investment capacity enable large-scale deployment of automated IVD systems and high-throughput testing. These facilities also play a critical role in managing acute and chronic diseases through early detection and ongoing disease management. With increasing patient volumes and demand for rapid diagnostics, hospitals and clinics continue to drive growth in the global IVD market.

North America to Hold the Largest Share of the In Vitro Diagnostics Market

North America is set to account for the largest share of the global in vitro diagnostics (IVD) market due to its well-established healthcare infrastructure, high healthcare spending, and early adoption of advanced IVD technologies. The region benefits from widespread access to point-of-care testing, growing awareness of personalized medicine, and rising prevalence of chronic and infectious diseases. Furthermore, the presence of major market players and ongoing investments in diagnostic innovation support continued market dominance. Government initiatives promoting early disease detection and prevention strategies also contribute significantly. The robust network of clinical laboratories and strong regulatory frameworks further bolster the region's leadership in the global IVD industry.

Recent Developments of In Vitro Diagnostics Market

? In April 2025, Tecan Group announced its acquisition of select ELISA immunoassay assets from Cisbio Bioassays SAS, including the manufacturing rights for four ELISA kits, two approved for in vitro diagnostics and two for research use. This strategic move enhances Tecan's diagnostics portfolio, particularly in specialty disease monitoring, strengthening its market presence and supporting broader access to high-quality IVD tools.

? In April 2025, Roche presented promising data at the AD/PD 2025 Conference, highlighting its Elecsys pTau181 plasma test, which shows potential for non-invasive detection of Alzheimer's-related amyloid pathology. Alongside the Brainshuttle AD programme entering Phase III, Roche's innovations reflect significant advancements in neurodegenerative disease diagnostics, fostering early detection and precision care, core pillars of IVD market growth.

? In November 2024, Illumina unveiled plans to launch TruSight Oncology 500 v2, an upgraded genomic profiling assay for comprehensive cancer diagnostics. With a global rollout expected in mid-2025, this technology underlines the industry's shift towards personalized medicine and molecular diagnostics both central to expanding IVD capabilities and meeting growing demand for targeted disease management.

In Vitro Diagnostics Market Segmentation

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In-Vitro Diagnostics Market Report and Forecast 2025-2034 offers a detailed analysis of the market based on the following segments:

By Product

- ? Instruments
- ? Reagents & Consumables
- ? Software and Services

By Specimen

- ? Blood, Serum and Plasma
- ? Saliva
- ? Urine
- ? Others

By Techniques

- ? Immunodiagnosics
- ? Clinical Chemistry
- ? Molecular Diagnostics
- ? Hematology
- ? Others

By Application

- ? Infectious Diseases
- ? Diabetes
- ? Oncology
- ? Cardiology
- ? Nephrology
- ? Autoimmune Diseases
- ? Drug Testing
- ? Other Applications

By Test Location

- ? Point of Care
- ? Homecare Settings
- ? Others

By End User

- ? Clinical Laboratories
- ? Hospitals
- ? Pharmaceuticals and Biotechnology Companies
- ? Blood Banks

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? Others

By Region

? North America

? Europe

? Asia Pacific

? Latin America

? Middle East and Africa

Key Market Players

The key features of the market report comprise patent analysis, grants analysis, funding and investment analysis, and strategic initiatives by the leading players. The major companies in the market are as follows:

Abbott

Abbott, headquartered in Illinois, USA, is a global leader in in vitro diagnostics (IVD), offering a wide range of diagnostic tools, including point-of-care testing and laboratory-based analyzers. The company's innovative diagnostic solutions support early disease detection and chronic disease management, enhancing patient outcomes. Abbott's strong global presence and continuous R&D investments drive market competitiveness.

Thermo Fisher Scientific

Based in Massachusetts, USA, Thermo Fisher Scientific is a key player in the IVD market, offering advanced diagnostic instruments, reagents, and software. Its comprehensive portfolio supports clinical laboratories in delivering precise diagnostics across infectious diseases and oncology. With ongoing innovation and strategic acquisitions, the company plays a critical role in expanding access to personalised diagnostic solutions worldwide.

Roche Diagnostics

Roche Diagnostics, a division of Switzerland-based F. Hoffmann-La Roche AG, is a leading provider of IVD technologies. Renowned for its molecular diagnostics and automated analyzers, Roche supports accurate disease detection and treatment monitoring. The company's strong presence in clinical laboratories and commitment to personalised healthcare positions it at the forefront of diagnostic market growth.

Danaher Corporation

Danaher Corporation, headquartered in Washington, D.C., owns several major diagnostics companies including Beckman Coulter and Cepheid. It offers cutting-edge solutions across molecular, clinical, and microbiology diagnostics. Danaher's strong innovation pipeline and focus on digital diagnostics contribute to efficient disease detection and improved healthcare delivery, strengthening its footprint in the global IVD market.

Other key players in the market include BIOMERIEUX, Becton, Dickinson and Company, QIAGEN, Quidel Corporation, Quest Diagnostics Incorporated and Siemens Healthineers AG.

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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 Global In Vitro Diagnostics Market Overview
- 3.1 Global In Vitro Diagnostics Market Historical Value (2018-2024)
- 3.2 Global In Vitro Diagnostics Market Forecast Value (2025-2034)
- 4 Vendor Positioning Analysis
- 4.1 Key Vendors
- 4.2 Prospective Leaders
- 4.3 Niche Leaders
- 4.4 Disruptors
- 5 Global In Vitro Diagnostics Market Landscape*
- 5.1 Global In Vitro Diagnostics Market: 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 Global In Vitro Diagnostics Market: Product Landscape
- 5.2.1 Analysis by Product
- 5.2.2 Analysis by Specimen
- 5.2.3 Analysis by Techniques
- 5.2.4 Analysis by Application
- 6 Global 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

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- 6.7 Industry Events, Initiatives, and Trends
- 6.8 Value Chain Analysis
- 7 Global In Vitro Diagnostics Market Segmentation (218-2034)
 - 7.1 Global In Vitro Diagnostics Market (2018-2034) by Product
 - 7.1.1 Market Overview
 - 7.1.2 Instruments
 - 7.1.3 Reagents & Consumables
 - 7.1.4 Software and Services
 - 7.2 Global In Vitro Diagnostics Market (2018-2034) by Specimen
 - 7.2.1 Market Overview
 - 7.2.2 Blood, Serum and Plasma
 - 7.2.3 Saliva
 - 7.2.4 Urine
 - 7.2.5 Others
 - 7.3 Global In Vitro Diagnostics Market (2018-2034) by Techniques
 - 7.3.1 Market Overview
 - 7.3.2 Immunodiagnosics
 - 7.3.3 Clinical Chemistry
 - 7.3.4 Molecular Diagnostics
 - 7.3.5 Hematology
 - 7.3.6 Others
 - 7.4 Global In Vitro Diagnostics Market (2018-2034) by Application
 - 7.4.1 Market Overview
 - 7.4.2 Infectious Diseases
 - 7.4.3 Diabetes
 - 7.4.4 Oncology
 - 7.4.5 Cardiology
 - 7.4.6 Nephrology
 - 7.4.7 Autoimmune Diseases
 - 7.4.8 Drug Testing
 - 7.4.9 Other Applications
 - 7.5 Global In Vitro Diagnostics Market (2018-2034) by Test Location
 - 7.5.1 Market Overview
 - 7.5.2 Point of Care
 - 7.5.3 Homecare Settings
 - 7.5.4 Others
 - 7.6 Global In Vitro Diagnostics Market (2018-2034) by End User
 - 7.6.1 Market Overview
 - 7.6.2 Clinical Laboratories
 - 7.6.3 Hospitals
 - 7.6.4 Pharmaceuticals and Biotechnology Companies
 - 7.6.5 Blood Banks
 - 7.6.6 Others
 - 7.7 Global In Vitro Diagnostics Market (2018-2034) by Region
 - 7.7.1 Market Overview
 - 7.7.2 North America
 - 7.7.3 Europe

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- 7.7.4 Asia Pacific
- 7.7.5 Latin America
- 7.7.6 Middle East and Africa
- 8 North America In Vitro Diagnostics Market (218-2034)
- 8.1 North America In Vitro Diagnostics Market (2018-2034) by Product
 - 8.1.1 Market Overview
 - 8.1.2 Instruments
 - 8.1.3 Reagents & Consumables
 - 8.1.4 Software and Services
- 8.2 North America In Vitro Diagnostics Market (2018-2034) by Specimen
 - 8.2.1 Market Overview
 - 8.2.2 Blood, Serum and Plasma
 - 8.2.3 Saliva
 - 8.2.4 Urine
 - 8.2.5 Others
- 8.3 North America In Vitro Diagnostics Market (2018-2034) by Techniques
 - 8.3.1 Market Overview
 - 8.3.2 Immunodiagnosics
 - 8.3.3 Clinical Chemistry
 - 8.3.4 Molecular Diagnostics
 - 8.3.5 Hematology
 - 8.3.6 Others
- 8.4 North America In Vitro Diagnostics Market (2018-2034) by Application
 - 8.4.1 Market Overview
 - 8.4.2 Infectious Diseases
 - 8.4.3 Diabetes
 - 8.4.4 Oncology
 - 8.4.5 Cardiology
 - 8.4.6 Nephrology
 - 8.4.7 Autoimmune Diseases
 - 8.4.8 Drug Testing
 - 8.4.9 Other Applications
- 8.5 North America In Vitro Diagnostics Market (2018-2034) by Test Location
 - 8.5.1 Market Overview
 - 8.5.2 Point of Care
 - 8.5.3 Homecare Settings
 - 8.5.4 Others
- 8.6 North America In Vitro Diagnostics Market (2018-2034) by End User
 - 8.6.1 Market Overview
 - 8.6.2 Clinical Laboratories
 - 8.6.3 Hospitals
 - 8.6.4 Pharmaceuticals and Biotechnology Companies
 - 8.6.5 Blood Banks
 - 8.6.6 Others
- 8.7 North America In Vitro Diagnostics Market (2018-2034) by Country
 - 8.7.1 United States of America
 - 8.7.1.1 United States of America In Vitro Diagnostics Market (2018-2034) by Product

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- 8.7.2 Canada
 - 8.7.2.1 Canada In Vitro Diagnostics Market (2018-2034) by Product
- 9 Europe In Vitro Diagnostics Market (218-2034)
 - 9.1 Europe In Vitro Diagnostics Market (2018-2034) by Product
 - 9.1.1 Market Overview
 - 9.1.2 Instruments
 - 9.1.3 Reagents & Consumables
 - 9.1.4 Software and Services
 - 9.2 Europe In Vitro Diagnostics Market (2018-2034) by Specimen
 - 9.2.1 Market Overview
 - 9.2.2 Blood, Serum and Plasma
 - 9.2.3 Saliva
 - 9.2.4 Urine
 - 9.2.5 Others
 - 9.3 Europe In Vitro Diagnostics Market (2018-2034) by Techniques
 - 9.3.1 Market Overview
 - 9.3.2 Immunodiagnosics
 - 9.3.3 Clinical Chemistry
 - 9.3.4 Molecular Diagnostics
 - 9.3.5 Hematology
 - 9.3.6 Others
 - 9.4 Europe In Vitro Diagnostics Market (2018-2034) by Application
 - 9.4.1 Market Overview
 - 9.4.2 Infectious Diseases
 - 9.4.3 Diabetes
 - 9.4.4 Oncology
 - 9.4.5 Cardiology
 - 9.4.6 Nephrology
 - 9.4.7 Autoimmune Diseases
 - 9.4.8 Drug Testing
 - 9.4.9 Other Applications
 - 9.5 Europe In Vitro Diagnostics Market (2018-2034) by Test Location
 - 9.5.1 Market Overview
 - 9.5.2 Point of Care
 - 9.5.3 Homecare Settings
 - 9.5.4 Others
 - 9.6 Europe In Vitro Diagnostics Market (2018-2034) by End User
 - 9.6.1 Market Overview
 - 9.6.2 Clinical Laboratories
 - 9.6.3 Hospitals
 - 9.6.4 Pharmaceuticals and Biotechnology Companies
 - 9.6.5 Blood Banks
 - 9.6.6 Others
 - 9.7 Europe In Vitro Diagnostics Market (2018-2034) by Country
 - 9.7.1 United Kingdom
 - 9.7.1.1 United Kingdom In Vitro Diagnostics Market (2018-2034) by Product
 - 9.7.2 Germany

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- 9.7.2.1 Germany In Vitro Diagnostics Market (2018-2034) by Product
- 9.7.3 France
 - 9.7.3.1 France In Vitro Diagnostics Market (2018-2034) by Product
- 9.7.4 Italy
 - 9.7.4.1 Italy In Vitro Diagnostics Market (2018-2034) by Product
- 9.7.5 Others
- 10 Asia Pacific In Vitro Diagnostics Market (218-2034)
 - 10.1 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Product
 - 10.1.1 Market Overview
 - 10.1.2 Instruments
 - 10.1.3 Reagents & Consumables
 - 10.1.4 Software and Services
 - 10.2 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Specimen
 - 10.2.1 Market Overview
 - 10.2.2 Blood, Serum and Plasma
 - 10.2.3 Saliva
 - 10.2.4 Urine
 - 10.2.5 Others
 - 10.3 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Techniques
 - 10.3.1 Market Overview
 - 10.3.2 Immunodiagnosics
 - 10.3.3 Clinical Chemistry
 - 10.3.4 Molecular Diagnostics
 - 10.3.5 Hematology
 - 10.3.6 Others
 - 10.4 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Application
 - 10.4.1 Market Overview
 - 10.4.2 Infectious Diseases
 - 10.4.3 Diabetes
 - 10.4.4 Oncology
 - 10.4.5 Cardiology
 - 10.4.6 Nephrology
 - 10.4.7 Autoimmune Diseases
 - 10.4.8 Drug Testing
 - 10.4.9 Other Applications
 - 10.5 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Test Location
 - 10.5.1 Market Overview
 - 10.5.2 Point of Care
 - 10.5.3 Homecare Settings
 - 10.5.4 Others
 - 10.6 Asia Pacific In Vitro Diagnostics Market (2018-2034) by End User
 - 10.6.1 Market Overview
 - 10.6.2 Clinical Laboratories
 - 10.6.3 Hospitals
 - 10.6.4 Pharmaceuticals and Biotechnology Companies
 - 10.6.5 Blood Banks
 - 10.6.6 Others

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- 10.7 Asia Pacific In Vitro Diagnostics Market (2018-2034) by Country
 - 10.7.1 China
 - 10.7.1.1 China In Vitro Diagnostics Market (2018-2034) by Product
 - 10.7.2 Japan
 - 10.7.2.1 Japan In Vitro Diagnostics Market (2018-2034) by Product
 - 10.7.3 India
 - 10.7.3.1 India In Vitro Diagnostics Market (2018-2034) by Product
 - 10.7.4 ASEAN
 - 10.7.4.1 ASEAN In Vitro Diagnostics Market (2018-2034) by Product
 - 10.7.5 Australia
 - 10.7.5.1 Australia In Vitro Diagnostics Market (2018-2034) by Product
 - 10.7.6 Others
- 11 Latin America In Vitro Diagnostics Market (2018-2034)
 - 11.1 Latin America In Vitro Diagnostics Market (2018-2034) by Product
 - 11.1.1 Market Overview
 - 11.1.2 Instruments
 - 11.1.3 Reagents & Consumables
 - 11.1.4 Software and Services
 - 11.2 Latin America In Vitro Diagnostics Market (2018-2034) by Specimen
 - 11.2.1 Market Overview
 - 11.2.2 Blood, Serum and Plasma
 - 11.2.3 Saliva
 - 11.2.4 Urine
 - 11.2.5 Others
 - 11.3 Latin America In Vitro Diagnostics Market (2018-2034) by Techniques
 - 11.3.1 Market Overview
 - 11.3.2 Immunodiagnosics
 - 11.3.3 Clinical Chemistry
 - 11.3.4 Molecular Diagnostics
 - 11.3.5 Hematology
 - 11.3.6 Others
 - 11.4 Latin America In Vitro Diagnostics Market (2018-2034) by Application
 - 11.4.1 Market Overview
 - 11.4.2 Infectious Diseases
 - 11.4.3 Diabetes
 - 11.4.4 Oncology
 - 11.4.5 Cardiology
 - 11.4.6 Nephrology
 - 11.4.7 Autoimmune Diseases
 - 11.4.8 Drug Testing
 - 11.4.9 Other Applications
 - 11.5 Latin America In Vitro Diagnostics Market (2018-2034) by Test Location
 - 11.5.1 Market Overview
 - 11.5.2 Point of Care
 - 11.5.3 Homecare Settings
 - 11.5.4 Others
 - 11.6 Latin America In Vitro Diagnostics Market (2018-2034) by End User

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- 11.6.1 Market Overview
- 11.6.2 Clinical Laboratories
- 11.6.3 Hospitals
- 11.6.4 Pharmaceuticals and Biotechnology Companies
- 11.6.5 Blood Banks
- 11.6.6 Others
- 11.7 Latin America In Vitro Diagnostics Market (2018-2034) by Country
 - 11.7.1 Brazil
 - 11.7.1.1 Brazil In Vitro Diagnostics Market (2018-2034) by Product
 - 11.7.2 Argentina
 - 11.7.2.1 Argentina In Vitro Diagnostics Market (2018-2034) by Product
 - 11.7.3 Mexico
 - 11.7.3.1 Mexico In Vitro Diagnostics Market (2018-2034) by Product
 - 11.7.4 Others
- 12 Middle East and Africa In Vitro Diagnostics Market (218-2034)
 - 12.1 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Product
 - 12.1.1 Market Overview
 - 12.1.2 Instruments
 - 12.1.3 Reagents & Consumables
 - 12.1.4 Software and Services
 - 12.2 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Specimen
 - 12.2.1 Market Overview
 - 12.2.2 Blood, Serum and Plasma
 - 12.2.3 Saliva
 - 12.2.4 Urine
 - 12.2.5 Others
 - 12.3 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Techniques
 - 12.3.1 Market Overview
 - 12.3.2 Immunodiagnosics
 - 12.3.3 Clinical Chemistry
 - 12.3.4 Molecular Diagnostics
 - 12.3.5 Hematology
 - 12.3.6 Others
 - 12.4 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Application
 - 12.4.1 Market Overview
 - 12.4.2 Infectious Diseases
 - 12.4.3 Diabetes
 - 12.4.4 Oncology
 - 12.4.5 Cardiology
 - 12.4.6 Nephrology
 - 12.4.7 Autoimmune Diseases
 - 12.4.8 Drug Testing
 - 12.4.9 Other Applications
 - 12.5 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Test Location
 - 12.5.1 Market Overview
 - 12.5.2 Point of Care
 - 12.5.3 Homecare Settings

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- 12.5.4 Others
- 12.6 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by End User
 - 12.6.1 Market Overview
 - 12.6.2 Clinical Laboratories
 - 12.6.3 Hospitals
 - 12.6.4 Pharmaceuticals and Biotechnology Companies
 - 12.6.5 Blood Banks
 - 12.6.6 Others
- 12.7 Middle East and Africa In Vitro Diagnostics Market (2018-2034) by Country
 - 12.7.1 Saudi Arabia
 - 12.7.1.1 Saudi Arabia In Vitro Diagnostics Market (2018-2034) by Product
 - 12.7.2 United Arab Emirates
 - 12.7.2.1 United Arab Emirates In Vitro Diagnostics Market (2018-2034) by Product
 - 12.7.3 Nigeria
 - 12.7.3.1 Nigeria In Vitro Diagnostics Market (2018-2034) by Product
 - 12.7.4 South Africa
 - 12.7.4.1 South Africa In Vitro Diagnostics Market (2018-2034) by Product
 - 12.7.5 Others
- 13 Regulatory Framework
 - 13.1 Regulatory Overview
 - 13.2 US FDA
 - 13.3 EU EMA
 - 13.4 INDIA CDSCO
 - 13.5 JAPAN PMDA
 - 13.6 Others
- 14 Patent Analysis
 - 14.1 Analysis by Type of Patent
 - 14.2 Analysis by Publication Year
 - 14.3 Analysis by Issuing Authority
 - 14.4 Analysis by Patent Age
 - 14.5 Analysis by CPC Analysis
 - 14.6 Analysis by Patent Valuation
 - 14.7 Analysis by Key Players
- 15 Funding and Investment Analysis
 - 15.1 Analysis by Funding Instances
 - 15.2 Analysis by Type of Funding
 - 15.3 Analysis by Funding Amount
 - 15.4 Analysis by Leading Players
 - 15.5 Analysis by Leading Investors
 - 15.6 Analysis by Geography
- 16 Strategic Initiatives
 - 16.1 Analysis by Partnership Instances
 - 16.2 Analysis by Type of Initiatives
 - 16.3 Analysis by Joint Ventures
 - 16.4 Analysis by Leading Players
 - 16.5 Analysis by Geography
- 17 Supplier Landscape

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17.1 Market Share Analysis, By Region (Top 5 Companies)

17.1.1 Market Share Analysis: Global

17.1.2 Market Share Analysis: North America

17.1.3 Market Share Analysis: Europe

17.1.4 Market Share Analysis: Asia Pacific

17.1.5 Market Share Analysis: Others

17.2 Abbott

17.2.1 Financial Analysis

17.2.2 Product Portfolio

17.2.3 Demographic Reach and Achievements

17.2.4 Company News and Development

17.2.5 Certifications

17.3 Thermo Fisher Scientific

17.3.1 Financial Analysis

17.3.2 Product Portfolio

17.3.3 Demographic Reach and Achievements

17.3.4 Company News and Development

17.3.5 Certifications

17.4 Bio-Rad Laboratories, Inc

17.4.1 Financial Analysis

17.4.2 Product Portfolio

17.4.3 Demographic Reach and Achievements

17.4.4 Company News and Development

17.4.5 Certifications

17.5 Siemens Healthineers AG

17.5.1 Financial Analysis

17.5.2 Product Portfolio

17.5.3 Demographic Reach and Achievements

17.5.4 Company News and Development

17.5.5 Certifications

17.6 BIOMERIEUX

17.6.1 Financial Analysis

17.6.2 Product Portfolio

17.6.3 Demographic Reach and Achievements

17.6.4 Company News and Development

17.6.5 Certifications

17.7 Becton, Dickinson and Company

17.7.1 Financial Analysis

17.7.2 Product Portfolio

17.7.3 Demographic Reach and Achievements

17.7.4 Company News and Development

17.7.5 Certifications

17.8 QIAGEN

17.8.1 Financial Analysis

17.8.2 Product Portfolio

17.8.3 Demographic Reach and Achievements

17.8.4 Company News and Development

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- 17.8.5 Certifications
- 17.9 Quidel Corporation
 - 17.9.1 Financial Analysis
 - 17.9.2 Product Portfolio
 - 17.9.3 Demographic Reach and Achievements
 - 17.9.4 Company News and Development
 - 17.9.5 Certifications
- 17.10 Roche Diagnostics Ltd.
 - 17.10.1 Financial Analysis
 - 17.10.2 Product Portfolio
 - 17.10.3 Demographic Reach and Achievements
 - 17.10.4 Company News and Development
 - 17.10.5 Certifications
- 17.11 Danaher Corporation
 - 17.11.1 Financial Analysis
 - 17.11.2 Product Portfolio
 - 17.11.3 Demographic Reach and Achievements
 - 17.11.4 Company News and Development
 - 17.11.5 Certifications
- 17.12 Quest Diagnostics Incorporated
 - 17.12.1 Financial Analysis
 - 17.12.2 Product Portfolio
 - 17.12.3 Demographic Reach and Achievements
 - 17.12.4 Company News and Development
 - 17.12.5 Certifications
- 18 Global In Vitro Diagnostics Market - Distribution Model (Additional Insight)
- 18.1 Overview
- 18.2 Potential Distributors
- 18.3 Key Parameters for Distribution Partner Assessment
- 19 Key Opinion Leaders (KOL) Insights (Additional Insight)

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