

Global Arbovirus Testing Market - Tests, Viruses & End-users

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Report description:

Global Arbovirus Testing Market Trends and Outlook

Arboviruses - arthropod-borne viruses transmitted by mosquitoes, ticks, and other blood-feeding insects - pose serious public health challenges worldwide. These viruses are responsible for diseases ranging from mild febrile illnesses to severe neurological conditions like encephalitis and meningitis. Diagnostic testing for arboviruses plays a critical role in early detection, outbreak control, and effective disease management, especially in tropical and subtropical regions where these viruses are endemic. Testing methods include ELISA, RT-PCR, NAATs, RDTs, and PRNT, which detect either viral RNA or immune response markers (IgM, IgG). The surge in global travel, urbanization, and climate change is expanding the habitat range of key vectors such as *Aedes aegypti* and *Aedes albopictus*, increasing the risk of outbreaks in new regions. Diseases like dengue, Zika, chikungunya, yellow fever, and West Nile virus are spreading more rapidly, emphasizing the need for scalable, fast, and accurate diagnostic solutions.

The global arbovirus testing market is projected to grow from US\$1.4 billion in 2024 to US\$1.9 billion by 2030, registering a CAGR of 5.8% during 2024-2030. This growth is driven by the rising global incidence of arboviral diseases, as highlighted by WHO data showing over 7.6 million dengue cases and over 620 thousand chikungunya cases in 2024 alone. Although Zika virus transmission has declined since 2017, it remains a threat in 89 countries due to its links to congenital Zika syndrome and Guillain-Barre Syndrome. Governments and international health bodies are investing in surveillance and expanding diagnostic infrastructure, particularly in high-risk regions. Innovations in molecular diagnostics and point-of-care testing are improving detection speed and accuracy, while growing public awareness is increasing demand for early and reliable testing. Public-private partnerships and R&D in affordable, sensitive testing tools are also helping expand market access in both developed and resource-limited settings, ensuring continued market growth.

Arbovirus Testing Regional Market Analysis

North America dominates the global arbovirus testing market in 2024, holding an estimated 43.4% share. This dominance is driven by the rising incidence of arboviral diseases such as Zika, West Nile virus, and dengue, alongside advancements in diagnostic technologies such as PCR and rapid antigen testing. The focus of public health agencies on early detection and outbreak prevention, along with ongoing technological innovations, continues to drive regional demand. The effects of climate

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change and the expanding distribution of vectors such as *Aedes aegypti* and *Aedes albopictus* are increasing transmission risks in this region. In contrast, the Asia Pacific region is projected to record the fastest CAGR of 7.6% during the forecast period 2024-2030, driven by an expanding patient population and enhanced government initiatives for early detection. The market's expansion is supported by robust healthcare facilities, improved diagnostic capabilities, and increased corporate interest in previously underserved markets. The development of improved laboratory networks and the implementation of integrated platforms for multi-virus detection are making arbovirus testing more accessible and affordable, particularly in rural and remote locations.

Arbovirus Testing Market Analysis by Test Type

The ELISA-based tests segment accounts for the largest share of 46.5% in the global arbovirus testing market by test type in 2024, due to their high sensitivity, affordability, quick results, and widespread use in clinical and research applications. These tests are becoming increasingly preferred for their function in evaluating vector control, pinpointing high-risk areas, and their extensive application in surveillance efforts. Continuous investments in R&D and technological advancements, such as the development of multiplex assays, are improving diagnostic accuracy and broadening market penetration. Meanwhile, the RT-PCR-based tests segment is expected to register the fastest growth at a CAGR of 6.8% from 2024 to 2030, driven by their superior sensitivity in detecting viral RNA and their critical role in early-stage diagnosis. Growing awareness strengthened public health surveillance, and ongoing innovations are accelerating the adoption of RT-PCR testing, particularly in regions at high risk for outbreaks.

Arbovirus Testing Market Analysis by Virus Type

The dengue virus segment dominates the arbovirus testing market by virus type, accounting for an estimated 45.5% share in 2024, driven by its high global prevalence, frequent outbreaks, and strong public health impact. According to WHO, over 7.6 million dengue cases were reported globally by April 2024, with the disease now endemic in more than 100 countries, particularly across Asia, the Americas, and the Western Pacific, which together bear the majority of the disease burden. Governments and global health agencies have intensified funding and surveillance programs, boosting demand for accurate and rapid diagnostics. This has led companies to prioritize product development for dengue testing. In contrast, the chikungunya virus segment is anticipated to grow at the fastest CAGR of 7.9% from 2024 to 2030, fueled by rising incidence, geographic expansion, and severe disease outcomes in vulnerable populations. Since 2004, mutations of the chikungunya virus have increased their transmission, resulting in over 620,000 reported cases across more than 110 countries as of 2024. The need for differential diagnosis due to symptom overlap between dengue and Zika is accelerating the adoption of multiplex molecular diagnostics. Additionally, public health initiatives in high-burden regions, such as India and Brazil, are further driving market expansion.

Arbovirus Testing Market Analysis by End-User

Public health laboratories leads the arbovirus testing market by end-user, accounting for a 36.9% share in 2024. This leadership is attributed to the broad adoption of advanced diagnostic technologies, including high-throughput platforms, next-generation sequencing, and rapid molecular assays, which enable more accurate, efficient, and scalable detection of arboviral infections. Their active collaboration with diagnostic companies, research institutions, and public health agencies enhances protocol standardization, knowledge exchange, and innovation in test development. These initiatives enhance testing precision and standardization across systems, reinforcing their pivotal role in outbreak surveillance and response. On the other hand, the diagnostic laboratories segment is expected to record the fastest growth rate at a CAGR of 6.9% from 2024 to 2030, owing to rising demand for timely results, increased arboviral disease burden, and the capacity for high-throughput, multi-pathogen detection, making them essential in disease monitoring and public health preparedness.

Arbovirus Testing Market Report Scope

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This report on Arbovirus Testing analyzes the global and regional markets based on test type, virus type, and end-user for the period 2021-2030 with forecasts 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: 2021-2024

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 11+

Arbovirus Testing 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

Arbovirus Testing Market by Test Type

- ELISA-based Tests
- RT-PCR based Tests
- Other Test Types (Including Nucleic Acid Amplification Tests (NAAT), Rapid Diagnostic Tests (RDTs), Plaque Reduction Neutralization Test (PRNT), and others)

Arbovirus Testing Market by Virus Type

- Dengue Virus
- Chikungunya Virus
- Zika Virus
- Yellow Fever Virus
- West Nile Virus
- Other Virus Types (Including Japanese Encephalitis Virus, Tick-borne Encephalitis Virus, Rift Valley Fever Virus, and others)

Arbovirus Testing Market by End-User

- Hospitals and Clinics
- Diagnostic Laboratories
- Research Institutes
- Public Health Laboratories

Table of Contents:

PART A: GLOBAL MARKET PERSPECTIVE

1. INTRODUCTION

- Product Outline
- Arbovirus Testing Defined
- Arbovirus Test Types

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- o ELISA-based Tests
- o RT-PCR based Tests
- o Other Test Types (Including Nucleic Acid Amplification Tests (NAAT), Rapid Diagnostic Tests (RDTs), Plaque Reduction Neutralization Test (PRNT), and others)
 - Arbovirus Virus Types
 - o Dengue Virus
 - o Chikungunya Virus
 - o Zika Virus
 - o Yellow Fever Virus
 - o West Nile Virus
 - o Other Virus Types (Including Japanese Encephalitis Virus, Tick-borne Encephalitis Virus, Rift Valley Fever Virus, and others)
- Arbovirus Testing End-Users
 - o Hospitals and Clinics
 - o Diagnostic Laboratories
 - o Research Institutes
 - o Public Health Laboratories
- 2. Key Market Trends
- 3. Key Market Players
 - Abbot Laboratories
 - Agilent Technologies Inc.
 - Bio-Rad Laboratories, Inc.
 - DiaSorin S.p.A.
 - Euroimmun AG
 - F. Hoffmann-La Roche AG
 - Gold Standard Diagnostics Frankfurt GmbH
 - Merck KGaA
 - QIAGEN N.V.
 - Siemens Healthineers AG
 - Thermo Fisher Scientific, Inc.
- 4. Key Business & Product Trends
- 5. Global Market Overview
 - Global Arbovirus Testing Market Overview by Test Type
 - o Arbovirus Testing Test Type Market Overview by Global Region
 - ELISA-based Tests
 - RT-PCR based Tests
 - Other Test Types
 - Global Arbovirus Testing Market Overview by Virus Type
 - o Arbovirus Testing Virus Type Market Overview by Global Region
 - Dengue Virus
 - Chikungunya Virus
 - Zika Virus
 - Yellow Fever Virus
 - West Nile Virus
 - Other Virus Types
 - Global Arbovirus Testing Market Overview by End-User
 - o Arbovirus Testing End-User Market Overview by Global Region
 - Hospitals and Clinics

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- Diagnostic Laboratories
- Research Institutes
- Public Health Laboratories

PART B: REGIONAL MARKET PERSPECTIVE

- Global Arbovirus Testing Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. North America

- North American Arbovirus Testing Market Overview by Geographic Region

- North American Arbovirus Testing Market Overview by Test Type
- North American Arbovirus Testing Market Overview by Virus Type
- North American Arbovirus Testing Market Overview by End-User
- Country-wise Analysis of North American Arbovirus Testing Market
 - o□The United States

- United States Arbovirus Testing Market Overview by Test Type
- United States Arbovirus Testing Market Overview by Virus Type
- United States Arbovirus Testing Market Overview by End-User

o□Canada

- Canadian Arbovirus Testing Market Overview by Test Type
- Canadian Arbovirus Testing Market Overview by Virus Type
- Canadian Arbovirus Testing Market Overview by End-User

o□Mexico

- Mexican Arbovirus Testing Market Overview by Test Type
- Mexican Arbovirus Testing Market Overview by Virus Type
- Mexican Arbovirus Testing Market Overview by End-User

7. Europe

- European Arbovirus Testing Market Overview by Geographic Region

- European Arbovirus Testing Market Overview by Test Type
- European Arbovirus Testing Market Overview by Virus Type
- European Arbovirus Testing Market Overview by End-User
- Country-wise Analysis of European Arbovirus Testing Market

o□Germany

- German Arbovirus Testing Market Overview by Test Type
- German Arbovirus Testing Market Overview by Virus Type
- German Arbovirus Testing Market Overview by End-User

o□France

- French Arbovirus Testing Market Overview by Test Type
- French Arbovirus Testing Market Overview by Virus Type
- French Arbovirus Testing Market Overview by End-User

o□The United Kingdom

- United Kingdom Arbovirus Testing Market Overview by Test Type
- United Kingdom Arbovirus Testing Market Overview by Virus Type
- United Kingdom Arbovirus Testing Market Overview by End-User

o□Italy

- Italian Arbovirus Testing Market Overview by Test Type
- Italian Arbovirus Testing Market Overview by Virus Type
- Italian Arbovirus Testing Market Overview by End-User

o□Spain

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- [] Spanish Arbovirus Testing Market Overview by Test Type
- [] Spanish Arbovirus Testing Market Overview by Virus Type
- [] Spanish Arbovirus Testing Market Overview by End-User
- o [] Rest of Europe
- [] Rest of Europe Arbovirus Testing Market Overview by Test Type
- [] Rest of Europe Arbovirus Testing Market Overview by Virus Type
- [] Rest of Europe Arbovirus Testing Market Overview by End-User

8. Asia-Pacific

- [] Asia-Pacific Arbovirus Testing Market Overview by Geographic Region
- [] Asia-Pacific Arbovirus Testing Market Overview by Test Type
- [] Asia-Pacific Arbovirus Testing Market Overview by Virus Type
- [] Asia-Pacific Arbovirus Testing Market Overview by End-User
- [] Country-wise Analysis of Asia-Pacific Arbovirus Testing Market
- o [] Japan

- [] Japanese Arbovirus Testing Market Overview by Test Type
- [] Japanese Arbovirus Testing Market Overview by Virus Type
- [] Japanese Arbovirus Testing Market Overview by End-User

o [] China

- [] Chinese Arbovirus Testing Market Overview by Test Type
- [] Chinese Arbovirus Testing Market Overview by Virus Type
- [] Chinese Arbovirus Testing Market Overview by End-User

o [] India

- [] Indian Arbovirus Testing Market Overview by Test Type
- [] Indian Arbovirus Testing Market Overview by Virus Type
- [] Indian Arbovirus Testing Market Overview by End-User

o [] South Korea

- [] South Korean Arbovirus Testing Market Overview by Test Type
- [] South Korean Arbovirus Testing Market Overview by Virus Type
- [] South Korean Arbovirus Testing Market Overview by End-User

o [] Rest of Asia-Pacific

- [] Rest of Asia-Pacific Arbovirus Testing Market Overview by Test Type
- [] Rest of Asia-Pacific Arbovirus Testing Market Overview by Virus Type
- [] Rest of Asia-Pacific Arbovirus Testing Market Overview by End-User

9. South America

- [] South American Arbovirus Testing Market Overview by Geographic Region
- [] South American Arbovirus Testing Market Overview by Test Type
- [] South American Arbovirus Testing Market Overview by Virus Type
- [] South American Arbovirus Testing Market Overview by End-User
- [] Country-wise Analysis of Asia-Pacific Arbovirus Testing Market

o [] Brazil

- [] Brazilian Arbovirus Testing Market Overview by Test Type
- [] Brazilian Arbovirus Testing Market Overview by Virus Type
- [] Brazilian Arbovirus Testing Market Overview by End-User

o [] Argentina

- [] Argentine Arbovirus Testing Market Overview by Test Type
- [] Argentine Arbovirus Testing Market Overview by Virus Type
- [] Argentine Arbovirus Testing Market Overview by End-User

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o Rest of South America

- Rest of South American Arbovirus Testing Market Overview by Test Type

- Rest of South American Arbovirus Testing Market Overview by Virus Type

- Rest of South American Arbovirus Testing Market Overview by End-User

10. Rest of World

- Rest of World Arbovirus Testing Market Overview by Test Type

- Rest of World Arbovirus Testing Market Overview by Virus Type

- Rest of World Arbovirus Testing Market Overview by End-User

PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

1. RESEARCH METHODOLOGY

2. FEEDBACK

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