SCOTTS INTERNATIONAL

Canada In-vitro Diagnostics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 68 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Canada In-vitro Diagnostics Market Analysis

The Canada in-vitro diagnostics market size stands at USD 4.05 billion in 2025 and is forecast to reach USD 5.17 billion by 2030, expanding at a 4.98% CAGR over the period. Rising healthcare spending that hit USD 372 billion in 2024, equivalent to 12.4% of national GDP, is creating headroom for test adoption. Demand is further amplified by a growing chronic-disease burden, government commitments exceeding USD 200 billion to modernize the system, and rapid uptake of molecular and digital platforms. Consolidation among large laboratories, the pivot toward decentralized testing, and provincial push for preventive screening programs are reinforcing steady volume growth. Competitive intensity is increasing as global majors introduce precision-oriented solutions and capitalize on Health Canada's comparatively flexible stance toward laboratory-developed tests.

Canada In-vitro Diagnostics Market Trends and Insights

Growing Burden of Chronic & Infectious Diseases

Nineteen percent of Canadians were aged 65 or older in 2024, a ratio expected to climb to 22.5% in coming years, intensifying demand for early diagnostic services. Long-COVID adds complexity, with 1 in 5 adults reporting persistent symptoms and 100,000 unable to work as of December 2023. These overlapping pressures are funneling public and private investment toward molecular and point-of-care assays capable of detecting chronic and infectious conditions earlier. As molecular diagnostics penetrate routine workflows, demand is shifting from static chemistry panels to high-value genomic and proteomic tests. This structural change underpins long-run volume and value growth for the Canada in-vitro diagnostics market.

Government-Led Healthcare Capacity Expansion & Modernization

Federal and provincial authorities have pledged more than USD 200 billion over ten years to widen family health services, clear backlogs, fortify mental-health supports, and digitize systems. Laboratory upgrades and cloud-enabled data platforms form a core element of this strategy, opening opportunities for integrated testing ecosystems. New policy guidance for machine-learning medical devices signals Health Canada's intent to nurture innovation while maintaining safety standards. Collectively, these initiatives expand addressable budgets and accelerate procurement cycles for advanced testing instruments and software across the Canada in-vitro diagnostics market.

Technical Complexity and Need for Skilled Personnel

Advanced molecular and digital platforms require specialized operators, yet expertise is unevenly distributed. A 2025 systematic review flagged infrastructure gaps and staffing shortages as key barriers to community-based molecular testing. Certification frameworks advocated by the Canadian Society of Clinical Chemists underscore the training burden for widespread point-of-care deployment. These manpower constraints slow test adoption in underserved areas, tempering growth potential for the Canada in-vitro diagnostics industry.

Other drivers and restraints analyzed in the detailed report include:

Rising Adoption of Advanced Diagnostic Technologies / Favorable National Screening & Preventive Health Programs / High Cost of Diagnostic Equipment and Tests /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Clinical Chemistry retained 28.4% of Canada in-vitro diagnostics market share in 2024, reflecting its entrenched role in chronic-disease management. Molecular Diagnostics, projected to grow at a 10.7% CAGR, is gradually reshaping care pathways by enabling rapid pathogen identification and comprehensive genomic profiling. Investments such as the USD 18.9 million PREPARED initiative will deploy molecular testing across 50 sites, embedding PCR and sequencing workflows into frontline practice. Hematology, Microbiology, Immuno-Diagnostics, Coagulation, and Urinalysis remain critical for specific clinical decisions, yet none match the velocity of molecular uptake. As assay menus widen and reimbursement stabilizes, Molecular platforms are expected to claim a larger slice of the Canada in-vitro diagnostics market size by 2030.

Hematology analyzers underpin efficient blood-disorder work-ups, while Microbiology laboratories diversify into multiplex PCR to tackle antimicrobial resistance. Immuno-Diagnostics supports autoimmune monitoring and therapeutic-drug management, whereas Coagulation testing gains relevance in an aging population with cardiovascular risk. Affordable dipstick Urinalysis persists in primary care due to simplicity. However, the precision and speed of sequencing and digital PCR offer clear clinical advantages, positioning Molecular Diagnostics as the signature growth engine of the Canada in-vitro diagnostics market.

Reagents & Kits generated 62.5% of revenue in 2024, underlining their consumable nature and resilient demand curve. Instruments face slower turnover because capital budgets remain constrained; many facilities operate legacy analyzers older than five years. Software & Services, though smaller, will register the fastest 9.9% CAGR as laboratories integrate cloud analytics, artificial intelligence, and workflow automation. Roche's navify suite exemplifies the shift toward data-driven diagnostics that connect disparate sites and improve clinical decisions.

Ongoing supply-chain reinforcement since the pandemic has prompted multi-vendor sourcing strategies for reagents, while proposed tax changes to raise the expensing limit to USD 5 million could accelerate instrument upgrades. Altogether, digitization is expanding the value pool beyond wet chemistry, enlarging long-term potential for the Canada in-vitro diagnostics market.

The Canada In-Vitro Diagnostics Market Report is Segmented by Test Type (Clinical Chemistry, Molecular Diagnostics, Hematology, and More), Product (Instrument, Reagents & Kits, and More), Usability (Disposable IVD Devices, and Reusable IVD Devices), Application (Infectious Disease, Diabetes, and More), and End Users (Diagnostic Laboratories, Hospitals & Clinics, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Roche / Abbott Laboratories / Siemens Healthineers / Danaher Corp. (Beckman Coulter & Cepheid) / Thermo Fisher Scientific / Beckton Dickinson / Bio-Rad Laboratories / bioMerieux / Hologic / QIAGEN / Sysmex / DiaSorin / Ortho Clinical Diagnostics (QuidelOrtho) / Illumina / Luminex Corp. (DiaSorin) / Sekisui Diagnostics / QuidelOrtho Corp. / Oxford Nanopore Technologies plc / Natera / Arkray /

Additional Benefits:

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

Table of Contents:

4.6.2 Bargaining Power of Buyers
4.6.3 Bargaining Power of Suppliers
4.6.4 Threat of Substitute Products
4.6.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value, USD)
5.1 By Test Type
5.1.1 Clinical Chemistry
5.1.2 Immuno-Diagnostics
5.1.3 Molecular Diagnostics
5.1.4 Hematology
5.1.5 Microbiology
5.1.6 Coagulation
5.1.7 Urinalysis
5.1.8 Other Tests
5.2 By Product
5.2.1 Instruments
5.2.2 Reagents & Kits
5.2.3 Software & Services
5.3 By Usability
5.3.1 Disposable IVD Devices
5.3.2 Reusable IVD Devices
5.4 By Application
5.4.1 Infectious Disease
5.4.2 Diabetes
5.4.3 Cancer / Oncology
5.4.4 Cardiology
5.4.5 Autoimmune Disorders
5.4.6 Nephrology
5.4.7 Blood Screening
5.4.8 Prenatal / NIPT
5.4.9 Other Applications
5.5 By End User
5.5.1 Diagnostic Laboratories
5.5.2 Hospitals & Clinics
5.5.3 Point-of-Care Centers
5.5.4 Home Care Settings
5.5.5 Other End Users

6 Competitive Landscape
6.1 Market Concentration
6.2 Market Share Analysis
6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
6.3.1 F. Hoffmann-La Roche AG
6.3.2 Abbott Laboratories
6.3.3 Siemens Healthineers AG

6.3.4 Danaher Corp. (Beckman Coulter & Cepheid)
6.3.5 Thermo Fisher Scientific Inc.
6.3.6 Becton, Dickinson & Company
6.3.7 Bio-Rad Laboratories Inc.
6.3.8 BioMerieux SA
6.3.9 Hologic Inc.
6.3.10 Qiagen N.V.
6.3.11 Sysmex Corporation
6.3.12 DiaSorin S.p.A.
6.3.13 Ortho Clinical Diagnostics (QuidelOrtho)
6.3.14 Illumina Inc.
6.3.15 Luminex Corp. (DiaSorin)
6.3.16 Sekisui Diagnostics
6.3.17 QuidelOrtho Corp.
6.3.18 Oxford Nanopore Technologies plc
6.3.19 Natera Inc.
6.3.20 ARKRAY Inc.

7 Market Opportunities & Future Outlook
7.1 White-Space & Unmet-Need Assessment

SCOTTS INTERNATIONAL

Canada In-vitro Diagnostics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 68 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-01
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com