Saudi Arabia In-vitro Diagnostics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 60 pages | Mordor Intelligence

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Report description:

Saudi Arabia In-vitro Diagnostics Market Analysis

The Saudi Arabia in vitro diagnostics market is expected to grow from USD 1.05 billion in 2025 to USD 1.09 billion in 2026 and is forecast to reach USD 1.31 billion by 2031 at 3.81% CAGR over 2026-2031. Momentum stems from Vision 2030 reforms that elevate diagnostics from hospital cost centers to revenue-generating services, while the Saudi Genome Program accelerates adoption of molecular platforms. Supply of reagents remains buoyant because routine diabetes and cardio-metabolic screening consume large kit volumes. Point-of-care uptake quickens as 5G-enabled IoMT links rural devices to urban specialists, and stricter SFDA rules reward firms with robust compliance capabilities. Competitive intensity is moderate; multinationals hold strong footprints, yet Lifera and other domestic entrants gain ground under Saudization quotas.

Saudi Arabia In-vitro Diagnostics Market Trends and Insights

Rising Prevalence of Diabetes & Cardio-Metabolic Disorders

Saudi Arabia allocates USD 26 billion yearly to diabetes management, translating into high volumes of glucose, HbA1c, and lipid tests across hospitals, pharmacies, and home settings. Continuous glucose monitoring attracts affluent populations seeking proactive care. Worksite wellness programs broaden point-of-care demand, and AI-driven analytics enrich diagnostic value by predicting glycemic excursions. Collectively these factors sustain consumable use and stabilize equipment refresh cycles across the Saudi Arabia in vitro diagnostics market.

Expansion of Private Healthcare Facilities

Vision 2030 aims to transition 290 hospitals and 2,300 primary centers into private management, reshaping revenue models toward fee-for-service diagnostics. Health clusters managed by the new Holding Company treat laboratories as profit centers, prompting procurement of high-throughput analyzers. At NEOM, an entirely digital hospital ecosystem illustrates end-to-end diagnostic integration and AI triage. International vendors partner with Saudi investors to localize assembly lines and satisfy Saudization quotas, reinforcing domestic capacity without diluting global quality standards.

Limited Reimbursement for Advanced Assays

Private insurers reimburse basic panels at higher ratios than next-generation sequencing, discouraging rapid uptake of costly molecular tests. Hospitals navigating fee-for-service models hesitate to absorb uncovered expenses, slowing oncology companion-diagnostic diffusion. Negotiated volume discounts partially offset costs but squeeze smaller laboratories. Until coverage broadens, high-complexity testing remains concentrated in academic centers, tempering broader Saudi Arabia in vitro diagnostics market penetration.

Other drivers and restraints analyzed in the detailed report include:

Adoption Surge in Point-of-Care & Home TestingMandatory Premarital & Pre-Employment Screening ProgramsStringent SFDA Approval Timelines

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

Segment Analysis

Clinical chemistry retained 35.10% of the Saudi Arabia in vitro diagnostics market share in 2025, reflecting sustained diabetes and lipid testing volumes. Molecular diagnostics, propelled by the Saudi Genome Program's 100,000 whole-genome sequences, is forecast to log a 7.95% CAGR to 2031, elevating the Saudi Arabia in vitro diagnostics market size for advanced assays. Immunoassays benefit from expanded autoimmune and infectious disease profiling, while hematology tests anchor routine inpatient panels.

Investment in next-generation sequencers at King Faisal Specialist Hospital underpins personalized oncology care and pharmacogenomics. AI-enabled workflows shorten analysis times, and localized variant databases improve diagnostic accuracy for Saudi populations. As genomic literacy rises among clinicians, adoption of companion diagnostics for targeted therapies accelerates, reshaping laboratory menus across tertiary centers.

Reagents and kits comprised 68.00% of 2025 revenue, underpinned by recurring purchases for chronic disease monitoring. Instruments are projected to deliver a 9.40% CAGR through 2031, expanding the Saudi Arabia in vitro diagnostics market size for capital equipment across new hospital builds. Automation systems that integrate pre- and post-analytics attract labs grappling with workforce shortages.

Flagship projects, such as the 23-story oncology and liver center at KFSHRC, require consolidated analyzers capable of processing diverse test panels. Domestic distributors broaden service footprints to guarantee uptime, and cold-chain expansions safeguard reagent integrity, further enhancing instrument utilization rates.

The Saudi Arabia In-Vitro Diagnostics Market Report is Segmented by Test Type (Clinical Chemistry, Molecular Diagnostics, Immuno-Diagnostics, and More), Product (Instruments, Reagents and Kits), Usability (Disposable IVD Devices and Re-Usable IVD Devices), Application (Infectious Disease, Diabetes, and More), and End-User (Diagnostic Laboratories, Hospitals and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Abbott Laboratories Al Borg Diagnostics Al Razi Medical Labs Becton Dickinson (BD) bioMerieux Bio-Rad Laboratories Dammam Regional Laboratory Danaher (Cepheid & Beckman Coulter) DiaSorin Fujifilm Wako Intelligent Bio Solutions / QabasTech King Faisal Specialist Hospital Labs Lifera (Saudi PIF biotech arm) QIAGEN Roche Saudi Diagnostic Laboratory Co. Siemens Healthineers Sysmex Saudi LLC Thermo Fisher Scientific Werfen

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