

Market insights summary

U.S. In vitro diagnostics market

What's trending and new

01. There is rapid growth of molecular diagnostics and precision testing

- The U.S. in vitro diagnostics (IVD) market is increasingly shifting toward molecular and precision diagnostics as healthcare providers demand faster, more accurate disease detection and personalized medicine.
- The growing prevalence of infectious diseases, including respiratory infections, sexually transmitted infections, and hepatitis, along with increasing adoption of precision oncology, is driving demand for high-sensitivity molecular diagnostic assays.

02. AI-enabled automation is becoming a key competitive differentiator

- Roche strengthened its artificial intelligence (AI) capabilities through the acquisition of PathAI and continued investment in AI-enabled diagnostics and digital pathology platforms.
- Siemens Healthineers, Beckman Coulter, and Abbott Laboratories continue to expand automated core laboratory solutions that improve throughput and laboratory productivity.
- Hospital and reference laboratory consolidation is increasing demand for integrated, high-throughput diagnostic platforms that support standardized workflows, operational efficiency, and broad testing capabilities across laboratory networks.

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2025 U.S. In vitro diagnostics market snapshot

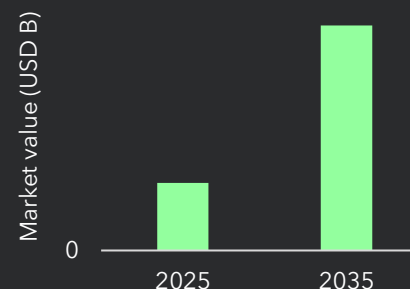
\$15.4B

Market revenue

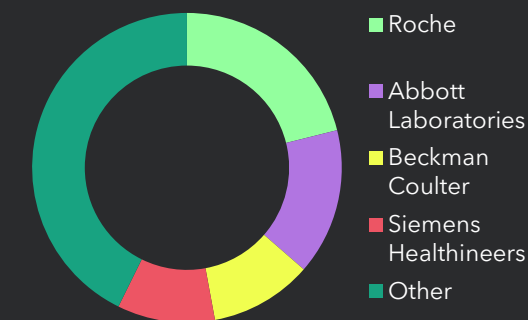
7.7%

CAGR ('19-'35)

U.S. molecular diagnostics market



2025 U.S. IVD competitive landscape



Roche

- Roche maintained leadership in the U.S. IVD market in 2025, supported by strong positions in immunoassay, clinical chemistry, and molecular diagnostics.
- Roche's planned USD 50 billion U.S. investment and acquisition of PathAI is expected to strengthen its long-term position in the IVD market.

Abbott Laboratories

- Abbott Laboratories was one the largest U.S. IVD players in 2025, owing to its success across clinical chemistry, immunoassay, molecular diagnostics, and hematology and coagulation.
- The company's acquisition of Exact Sciences expands its oncology diagnostics capabilities and enhances its ability to compete in the high-growth molecular and precision medicine segments.