



# Clinical Laboratory Market Insights for Africa

(Forecast to 2023)

Medlab Middle East 

By Informa Markets

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# World clinical laboratory market at a glance

Clinical laboratories are an integral part of the healthcare continuum. Clinical laboratories perform tests on specimens from the body that are used in the diagnosis and treatment of patients. These can vary from blood tests to genetic analysis. Clinical laboratory services are provided by laboratories located at hospitals and clinics, as well as by independent laboratories.

According to data from “World Population Prospects: the 2017 Revision”, the number of older persons — those aged 60 years or over — is expected to more than double by 2050 and to more than triple by 2100, rising from 962 million globally in 2017 to 2.1 billion in 2050 and 3.1 billion in 2100. Globally, population aged 60 or over is growing faster than all younger age groups.

As the world’s demographics change, healthcare systems around the world will face significant challenges to meet the needs of an aging population. In this context, the clinical laboratory can play an important role by defining proper reference ranges, identifying disease processes early, and aiding in the treatment process.

The global clinical laboratory services market is estimated at **US \$205.56 billion in 2016** and is expected to reach **US \$333.45 billion by 2023**, growing at a **CAGR of 7.1% from 2016 to 2023**, according to a report by WiseGuyReports.com.

The growing aging population, introduction of technologically advanced products and increasing the pace of R&D for new products are some factors boosting the market growth, the report highlights. In addition, growing numbers of FDA approvals for new diagnostics procedures will result in vendors focusing on the launch of new, timesaving, and cost-effective diagnostics procedures to increase their market shares. However, factors such as inadequate reimbursements and stringent government policies are restricting the market growth.

By service providers, stand-alone laboratories segment acquired the largest market share in the global market due to the wide range of tests offered by these labs, the presence of a new range of condition-specific markers and tests with advances in genomics & proteomics. In North America, the United States registered the largest share during the forecast period. The factors responsible to largest regional share include presence of large test volumes and growing acceptance of sophisticated diagnostic technologies.

**According to a report by WiseGuyReports.com, the Middle East & Africa market for clinical laboratory services is estimated to reach US \$ 14,067 million by 2023 from US \$11,252 in 2017 (registering a CAGR of 3.8% from 2017 to 2023.)**



## Clinical laboratory services consumption by region

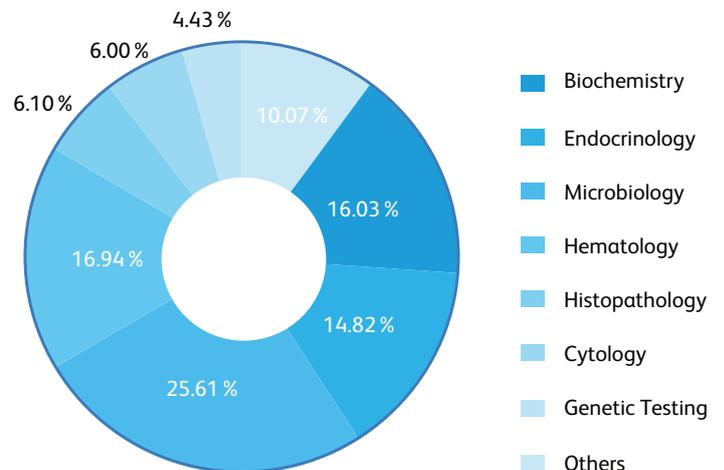
From the past few years, the global market for clinical laboratory services is expected to grow from **US \$210,341 million in 2017 to US \$274,450 million by 2023**. Under the scope of the study by WideGuyReports.com, the global market for clinical laboratory services is segmented into four major regions, namely, the Americas, APAC, Europe, and the Middle East and Africa. These regions are estimated to hold approximately 98.92% of the market, collectively. Moreover, it is estimated that the Americas held the largest share (by revenue) in 2017.

	2013	2017	2023	2013-2017 CAGR
Americas	66003	82322	108913	5.68%
APAC	30747	39600	53044	6.53%
Europe	60283	74878	95669	5.57%
Middle East & Africa	9307	11252	14067	4.86%
Other	1952	2289	2757	4.06%
Global	168292	210341	274450	5.73%

Clinical laboratory services consumption (Million USD) CAGR by region 2013-2023

## Clinical laboratory services segment by type

Based on type, the clinical laboratory services market has been segmented into **biochemistry, endocrinology, microbiology, hematology, histopathology, cytology, genetic testing**, and others. For the purpose of this report, the types of clinical laboratory services have been listed in order of rank from largest estimated market share in terms of CAGR during the period from 2017 to 2023.



Global clinical laboratory services consumption share by type



## 1. Genetic Testing

The genetic testing segment is anticipated to register a **CAGR of 5.76 % during the period from 2017 to 2023.**

Newborn screening is a rapidly growing genetic test. Most of the hospitals in North America have implemented the use of newborn screening in order to determine the possible development of genetic disorder in children.

Increasing contribution of various genomic diagnostic organizations has also promoted the growth of the genetic testing services market. For instance, in January 2018, Veracyte, Inc. announced that it has performed 100,000 Afirma genomic tests to help reduce unnecessary surgeries in patients being evaluated for potential thyroid cancer.

## 2. Microbiology

Microbiology laboratory services are anticipated to register a **CAGR of 5.0 % during the period from 2017 to 2023.**

Owing to the rising cases of infection caused by pathogens, infectious disease specialists are dependent on high-quality diagnostic information from clinical microbiology laboratories. Considering this scenario, Medicare Part B for microbiology tests increased by 10 % from 2015 to 2016 i.e. from US \$517 million in 2015 to US

\$570 million in 2016. It is also reported that two of the microbial tests i.e. a test measuring bacterial count in urine and a test evaluating antimicrobial drugs appeared in the top 25 laboratory tests in 2016.

## 3. Histopathology

Histopathology laboratory services are anticipated to register a **CAGR of 5.0 % during the period from 2017 to 2023.**

Histopathology is the microscopic examination of body tissues to spot signs and characteristics of diseases. Over the years, the rising awareness about breast cancer has increased the demand for histopathological examinations, as Immunohistochemistry is the most commonly used test to determine the presence of the HER2 receptor protein.

## 4. Cytology

Cytology laboratory services are anticipated to register a **CAGR of 3.76 % during the period from 2017 to 2023.**

In the cytology laboratory, specimens are investigated to detect microscopic cancerous and pre-cancerous changes at the cellular level, and often long before the onset of clinical symptoms. Cytology laboratory services mainly include diagnostic examinations of pap tests, sputum, urine, fine needle aspiration specimens, and other body fluids. Fine- Needle Aspiration Cytology (FNAC) is a widely accepted diagnostic procedure that has replaced open biopsy.

On considering historical years, population-wide screening with cytology led to the dramatic decline in cervical cancer rates, and cytology has been used as one of the most effective cancer prevention measures to date.

## 5. Biochemistry

The biochemistry segment is likely to register a **CAGR of 3.43% during 2017 to 2023.**

Owing to the rising prevalence of heart and renal diseases, the demand for biochemical laboratory testing is also escalating, as biochemical tests are of great importance in the diagnosis of heart diseases. The most commonly measured biochemical markers for cardiac damage are Myoglobin, Lactic dehydrogenase (LDH), and others.

## 6. Hematology

The hematology segment is projected to register a **CAGR of 3.31% during the period from 2017 to 2023.**

According to the 2018 statistics suggested by the Leukemia & Lymphoma Society, around 60,300 people are expected to be diagnosed with leukemia, and 24,370 people are expected to die from leukemia. Growing prevalence of blood cancers and other related complications increase the demand for haematology thus contributing to the growth of the market.



## The Middle East & Africa market overview

The Middle East & Africa market for clinical laboratory services is estimated to reach US \$ 14,067 million by 2023 from US \$11,252 in 2017 (registering a CAGR of 3.8 % from 2017 to 2023.)

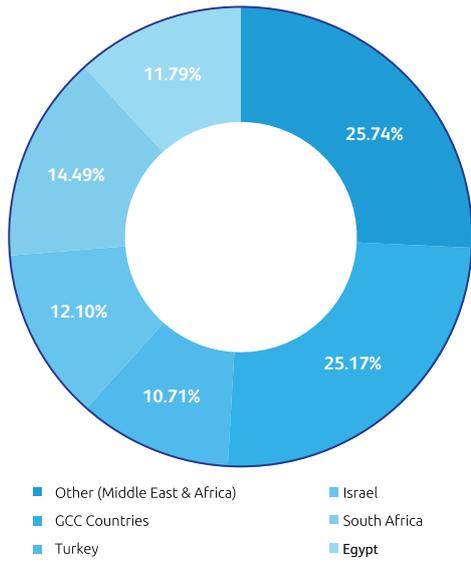
Rising government support for the healthcare sector followed by rising healthcare expenditure is a major driver for the market to grow within the region.

These growth figures arise despite the fact that the Middle East and Africa held the least market share of the clinical laboratory services market in 2017 owing to stringent government regulations, lack of healthcare services and poor healthcare infrastructure, and the presence of low-income countries in the African region.

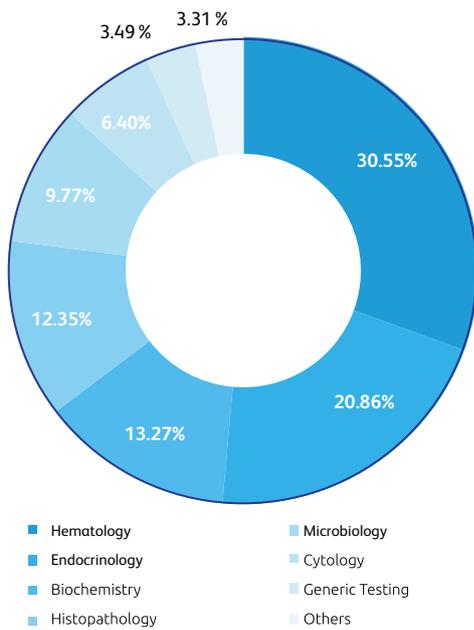
A number of government efforts to help fill the gaps persisting in the market can now be seen such as Sharjah Healthcare City under which Sharjah's Investment and Development Authority (Shurooq) is projected to invest a sum of AED 5.6 billion by 2020. Moreover, the Dubai Clinical Services Capacity Plan of 2015 involved building three new medical colleges and five nursing schools with an aim to make the nursing profession more desirable and retain high calibre medical and healthcare staff.



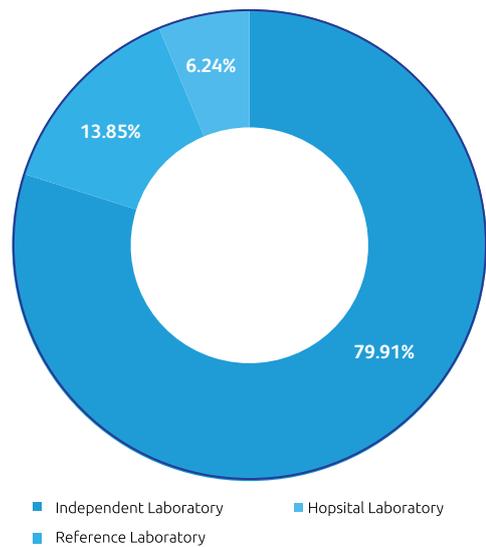
## The Middle East & Africa clinical laboratory services market size by countries



## The Middle East & Africa clinical laboratory services consumption by type



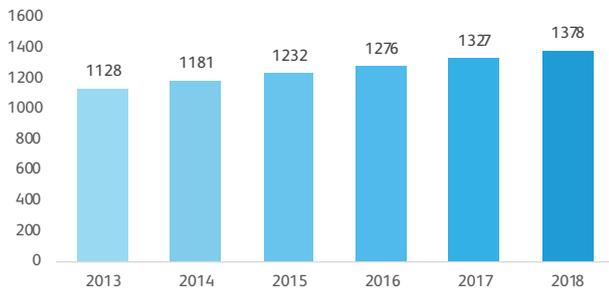
## The Middle East & Africa clinical laboratory services consumption by application



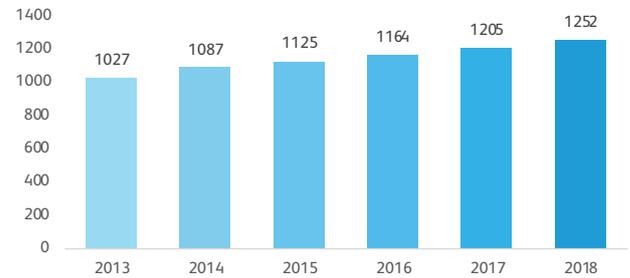
# Country profiles

## Laboratory services market size (Million USD) 2013 - 2018

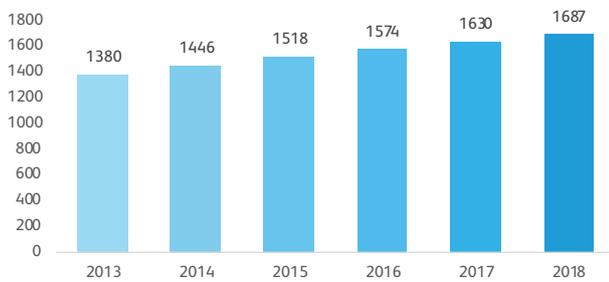
### Egypt



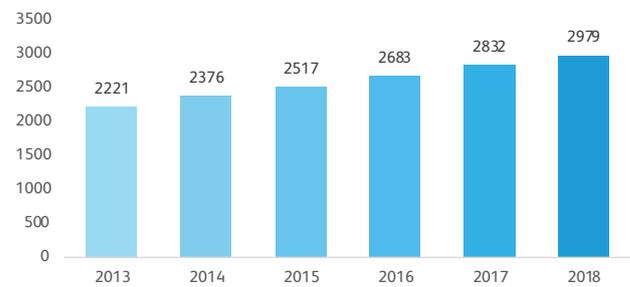
### Turkey



### South Africa



### GCC Countries



### Israel

