

D-dimer Testing Market: Surge in Prevalence of Blood Clotting Disorders to Drive the Market

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Prevalence of numerous diseases such as cancer, diabetes, and neurological disorders has increased due to rise in geriatric population and changing lifestyle in developing economies.

Â The global D-dimer testing market was valued at approximately US\$ 1.9 Bn in 2016 is projected to register cumulative annual growth rate (CAGR) of over 4.0% from 2017 to 2025, according to a new report published by Transparency Market Research (TMR) titled “D-dimer Testing Market – Global Industry Analysis, Size, Share, Growth, Trends, and Forecast, 2017–2025”. The report suggests that surge in incidences of deep vein thrombosis and pulmonary embolism boost the demand of D-dimer testing in the coming years (2017 to 2025). The North America and Europe are projected to dominate the global D-dimer testing market in the coming years owing to higher adoption and awareness regarding the association between CVD risks and D-dimer tests for exclusion of DVT, PE and DIC. Asia-Pacific, LATAM, and MEA demonstrate slow evolution, with a huge potential for market growth. Asia Pacific D-dimer testing market is expected to witness a CAGR of around 5.0% from 2017 to 2025.

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According to the CDC, about 900,000 people could be affected in the U.S. each year by deep vein thrombosis. It is suggested that 60,000 to 100,000 people in the U.S. die due to deep vein thrombosis. Clotting disorders occur when the body is unable to produce clotting factors to stop bleeding. Deep vein thrombosis is one of the clotting disorders, wherein there is formation of blood clot within the deep vein, commonly in the legs. This ever-increasing burden of blood clotting disorders is expected to drive the market during the forecast period. Additionally, in several developed countries, self-testing of blood by patients at home is popular. It provides accurate and quick results, leading to the growth of the global d-dimer testing market during the forecast period.

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In terms of accurate quantitative estimation of D-dimer, laboratory-based analysis is a robust technique as compared to point-of-care test. Moreover, laboratory-based test can be paramount in not only identifying individuals who are at a risk of first thrombotic event, but also detecting the chances of having a recurrent VTE. Overall, the drawbacks associated with laboratory test include need for adequate space to set up and high response time (40 minutes to 50 minutes) as compared to POC tests (10 minutes to 15 minutes). The laboratory test segment has been sub-segmented into coagulation analyzers and clinical chemistry analyzers. Clinical chemistry analyzers are commonly used to determine D-dimer level in blood serum in a laboratory setup. Compared to coagulation analyzers, demand for clinical chemistry analyzers is high due to low cost of test. Technological advancements have contributed significantly in reducing the unit cost associated with D-dimer tests

at laboratories and POCs. The advent of sensitive D-dimer assays that are used on automated coagulation analyzers has completely revolutionized the market dynamics in the past few years. Kits used in coagulation analyzers are highly specific to the device/manufacturer and are expensive as compared to clinical chemistry analyzers.

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On the basis of applications, the global D-dimer testing market has been segmented into: deep vein thrombosis (DVT), pulmonary embolism (PE), disseminated intravascular coagulation (DIC) and others. According to the Society of Interventional Radiology (U.S.), about 600,000 new cases of DVT are diagnosed in the U.S. each year, while the National Health Service (NHS) records about 1 person in 1,000 with DVT in the U.K. each year. The number of D-dimer tests for DVT application were around 58 million in 2016 and are expected to reach around 86 million in 2025. Pulmonary embolism is difficult to detect based on clinical symptoms and therefore demanded the use of fully automated coagulation analyzers to run tests based on multiple methods with increased safety, precision, and accuracy compared with manual methods. Diagnosis of DIC is difficult because clinical manifestations are not uniform and there is no consensus regarding appropriate tests for laboratory diagnosis. Despite the drawbacks, most clinicians rely on D-dimer test results to indicate the presence or absence of DIC. In the past few years, rapid D-dimer assays with clinical performance are at par with conventional ELISA that has become widely available for exclusion of DIC.

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Geographically, the D-dimer testing market has been segmented into five major regions: North America, Europe, Asia Pacific, Latin America, and Middle East and Africa. North America leads the global D-dimer testing market valued at USD 782.8 million in 2016 owing to higher adoption and awareness regarding the association between CVD risks and D-dimer tests for exclusion of DVT, PE and DIC. In terms of volume, the number of D-dimer tests in Europe stood at 48 million in 2016 and is expected to reach 67.7 million 2025. The North America region is expected to maintain its leadership position in terms of revenue by end of the forecast period due to the large and ever-increasing addressable patient population base. Europe is the largest market in 2016 in term of volume due to extensive research activities and large number of screening programs by health care institutes.

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Key Players such as Abbott Laboratories, Siemens Healthineers, F. Hoffmann-La Roche Ltd., and Beckman Coulter (Danaher Corporation) are Likely to Continue to Lead the Global D-dimer Testing Market.

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The global D-dimer testing market is highly fragmented in terms of number of players in the market providing instruments, kits, and reagents. The key players contributing to the growth of the global D-dimer testing market include Abbott Laboratories, Beckman Coulter, Inc., Bio/Data Corporation, Becton, Dickinson and Company, Grifols, S.A., F. Hoffman-La Roche Ltd., Helena Biosciences, Siemens Healthcare, Sysmex Corporation, and Thermo Fisher Scientific. Expansion of product portfolio through mergers and acquisitions is a key strategy followed by many global player. For instance, on October 3, 2017, Abbott Laboratories announced the acquisition of Alere Inc., a provider of diagnostic devices and services, for nearly US\$ 5,300.0 Mn. Through this acquisition, the company aims to expand its product portfolio in the in-vitro diagnostics sector, thereby complementing its leading position in the global market.

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