

Eastern Europe Molecular Diagnostics Market to Surpass USD 1.6 Billion by 2035, Growing at 3.2% CAGR from 2025 | TMR

Eastern Europe Molecular Diagnostics Market to reach US\$ 1.6 Bn by 2035, growing at 3.2% CAGR, driven by advanced testing adoption and healthcare expansion.

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The [Eastern Europe molecular diagnostics market](#) is entering a decisive growth phase, fueled by advances in diagnostic technologies, rising demand for personalized medicine, and the urgent need to manage infectious and chronic diseases in the region. Valued at US\$ 1.1 billion in 2024, the market is projected to grow at a CAGR of 3.2% between 2025 and 2035, ultimately crossing US\$ 1.6 billion by the end of 2035. Despite its relatively moderate growth rate compared to other global regions, Eastern Europe represents an evolving diagnostic landscape shaped by unique healthcare challenges, infrastructure development, and ongoing medical reforms.

Eastern Europe Molecular Diagnostics Market Outlook 2035

The Eastern Europe molecular diagnostics industry was valued at

US\$ 1.1 Bn
in 2024

The Eastern Europe molecular diagnostics market is projected to grow at a

CAGR 3.2%
from 2025 to 2035

and cross **US\$ 1.6 Bn** by the end of 2035



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Analysts' Viewpoint: Why Eastern Europe is an Important Growth Market for Molecular Diagnostics

Molecular diagnostics has gained ground as a central pillar in modern healthcare. Analysts emphasize that the growing prevalence of infectious diseases such as tuberculosis, HIV, and hepatitis, as well as chronic conditions like cancer and cardiovascular diseases, is generating strong demand for advanced diagnostic systems in Eastern Europe. Conventional diagnostic methods often fail to provide adequate sensitivity and specificity, necessitating PCR (polymerase

chain reaction), next-generation sequencing (NGS), and other advanced molecular testing technologies.

Healthcare professionals are increasingly aware of the potential of molecular diagnostics to deliver personalized care strategies. With rising demand for precision medicine, tailored therapies based on genetic markers are becoming more common. Furthermore, the COVID-19 pandemic accelerated the rollout of molecular diagnostics across Eastern Europe, highlighting the importance of diagnostic readiness in times of global health emergencies.

Governments in countries such as Poland, Romania, and Hungary are investing in modernizing healthcare infrastructure, building laboratory capacity, and encouraging research collaborations with international biotech players. Analysts note that these developments, combined with the expansion of point-of-care molecular diagnostics, create favorable conditions for sustainable growth in the region.

Market Introduction: Molecular Diagnostics at the Forefront of Healthcare

Molecular diagnostics refers to the analysis of DNA, RNA, or proteins to detect disease markers at the molecular level. This approach enables accurate diagnosis, early detection, and improved patient outcomes. Techniques such as PCR, sequencing, and in situ hybridization are now routine in medical laboratories.

PCR (Polymerase Chain Reaction): The most widely adopted technique, PCR amplifies small DNA sequences to detect the presence of pathogens or mutations with high sensitivity. Variants such as qPCR (quantitative PCR) and digital PCR provide deeper insights into gene expression levels and viral loads.

Next-Generation Sequencing (NGS): This transformative technology allows large-scale genome analysis at lower costs, supporting cancer genomics, rare disease research, and personalized medicine.

In Situ Hybridization (ISH): By using labeled probes, ISH identifies the spatial distribution of genetic material within tissues, which is critical in oncology and developmental biology.

Isothermal Amplification (e.g., LAMP): A cost-effective alternative to PCR, requiring minimal equipment, making it highly suitable for point-of-care testing in resource-limited settings.

DNA Microarrays: Used for gene expression profiling, enabling large-scale screening of genetic activity in diseases such as cancer.

Together, these technologies are revolutionizing diagnostic strategies in Eastern Europe, offering greater reliability, speed, and affordability compared to older diagnostic methods.

Market Drivers

Rising Prevalence of Infectious Diseases

Eastern Europe faces a disproportionate burden of infectious diseases. According to UNAIDS, the region remains one of the few areas where the HIV epidemic continues to expand, with new infections rising by 49% and AIDS-related deaths increasing by 46% in recent years.

For example:

Ukraine has the second highest HIV/AIDS burden in Eastern Europe, with a prevalence rate of 1% in the general population, 21% in injecting-drug users, and 7.5% among homosexual men.

Tuberculosis also remains a public health crisis. In 2018, Ukraine reported 30,000 new TB cases, with nearly 29% drug-resistant strains.

Molecular diagnostics such as PCR and NGS enable early and accurate identification of pathogens, which is critical for disease control and effective treatment. Conventional diagnostic tools often miss drug-resistant strains, making molecular testing indispensable for healthcare providers.

Increasing Awareness Among Healthcare Professionals

Healthcare professionals across Eastern Europe are now more aware of the benefits of molecular diagnostics, thanks to continuous medical training, research dissemination, and global best-practice exchanges. Physicians are shifting toward genetic-based testing to identify cancer mutations, infectious agents, and hereditary disorders.

This increased awareness is particularly evident in oncology and infectious disease management, where molecular diagnostics not only improve treatment precision but also reduce disease transmission rates.

Market Segmentation Insights

By Technology: PCR Leads the Market

PCR remains the leading technology, widely regarded as the gold standard for diagnosing infectious and genetic diseases. Its versatility, cost-effectiveness, and ability to deliver rapid, reliable results have made it the backbone of the molecular diagnostics market in Eastern Europe.

However, NGS adoption is rising steadily, especially in oncology and genetic research, as costs decline and data analytics tools become more accessible. Digital PCR and isothermal

amplification techniques are also gaining popularity for point-of-care applications.

By Application: Infectious Diseases and Oncology Dominate

Infectious Diseases: Remain the largest application segment, driven by the high incidence of HIV, tuberculosis, hepatitis, and other viral infections in the region.

Oncology: The fastest-growing segment, supported by rising cancer incidence and the adoption of personalized therapies. Molecular diagnostics play a central role in identifying biomarkers for breast, lung, colorectal, and prostate cancers.

Genetic Testing and Neurological Disorders: Represent emerging opportunities, with newborn screening and rare disease diagnosis gaining prominence.

By End User: Hospitals and Diagnostic Laboratories

Hospitals and diagnostic laboratories dominate the market due to their capacity to handle advanced technologies such as NGS and PCR. However, the trend toward point-of-care diagnostics is expected to grow significantly in rural and underserved regions of Eastern Europe.

Regional Outlook

Poland: The Market Leader

Poland holds the largest share of the Eastern Europe molecular diagnostics market. Factors driving growth include:

Strong healthcare infrastructure investments.

A thriving biotechnology industry.

Pro-research government policies encouraging domestic and international R&D investments.

Poland also benefits from rising cancer incidence, aging population, and public health reforms, all of which reinforce the demand for precise diagnostic tools.

Rest of Eastern Europe

Romania and Bulgaria: Increasing government funding for healthcare reforms and battling high infectious disease prevalence.

Hungary and Serbia: Growing biotechnology ecosystems and adoption of diagnostic solutions.

Ukraine and neighboring regions: High burden of HIV and tuberculosis driving demand for reliable molecular testing.

Competitive Landscape

Leading multinational companies dominate the Eastern Europe molecular diagnostics market,

supported by continuous innovation, partnerships, and localized strategies. Key players include:

F. Hoffmann-La Roche AG

Abbott

Illumina, Inc.

Thermo Fisher Scientific Inc.

Becton, Dickinson and Company (BD)

bioMérieux

DiaSorin S.p.A.

Hologic, Inc.

SD Biosensor, Inc.

QIAGEN N.V.

Siemens Healthineers AG

Grifols, S.A.

Recent Developments

April 2025 – Abbott: Launched its CE-marked HR HPV assay in Europe, enabling self-collection of vaginal samples for HPV genotyping.

September 2024 – QIAGEN: Introduced the QIAcuityDx Digital PCR System for cancer monitoring, FDA-exempt in the U.S. and IVDR-approved in Europe.

These innovations highlight the industry's focus on expanding testing portfolios, improving accessibility, and supporting companion diagnostics in personalized medicine.

Future Opportunities and Challenges

Opportunities

Expansion of point-of-care testing to rural and underserved areas.

Increasing role of genetic testing in newborn screening and rare disease diagnostics.

Adoption of artificial intelligence and bioinformatics for managing large-scale NGS datasets.

Challenges

Cost constraints in resource-limited healthcare systems.

Unequal access to advanced diagnostics across rural vs. urban populations.

Regulatory hurdles and delays in technology adoption.

The Eastern Europe molecular diagnostics market is set to expand steadily, supported by advancements in PCR and NGS, growing burden of infectious and chronic diseases, and

government healthcare reforms. While challenges such as cost pressures and uneven healthcare access remain, the shift toward personalized medicine and point-of-care diagnostics ensures that molecular diagnostics will continue to transform healthcare delivery in the region.

By 2035, with revenues projected to reach US\$ 1.6 billion, the region is expected to witness deeper integration of molecular diagnostics into mainstream healthcare, laying the foundation for precision-driven, patient-centered medicine.

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