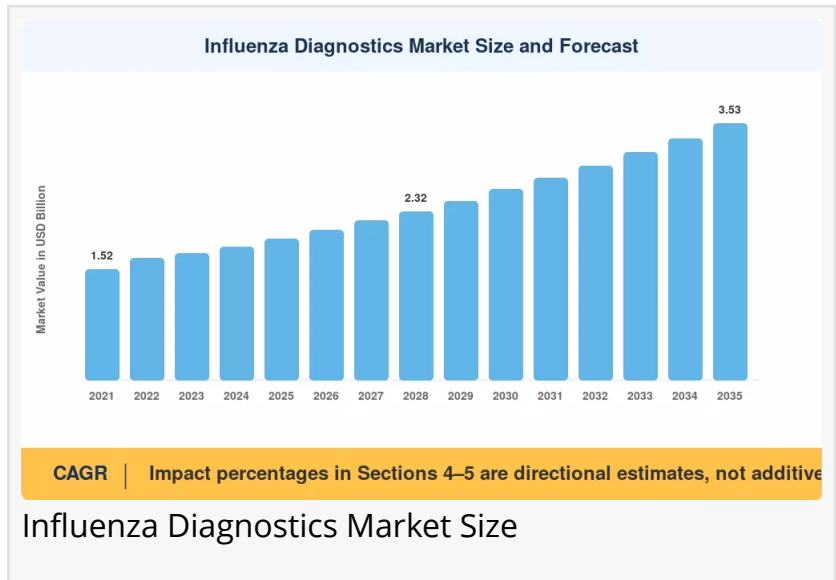


Influenza Diagnostics Market to reach USD 3.53 Billion by 2035 at 6.15% CAGR

Influenza Diagnostics Market to Climb from USD 1.94 Billion in 2025 to USD 3.53 Billion by 2035—By Molecular Platform Migration, Government Surveillance Funding

NY, CA, UNITED STATES, June 30, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Influenza Diagnostics Market size](#) to reach USD 3.53 Billion by 2035 from USD 1.94 Billion in 2025, at a CAGR of 6.15% during the forecast period 2026–2035. The market is projected to reach USD 2.06 Billion in 2026 as the forecast period begins.



The 6.15% CAGR—anchored by structural post-pandemic investment in pathogen preparedness rather than discretionary diagnostic spending—is driven by three converging forces: molecular platform migration that continues to displace legacy culture-based and antigen testing with RT-PCR, LAMP, and CRISPR-based assays delivering sensitivities above 95%, sustained government surveillance funding that has embedded influenza diagnostics into national pandemic-preparedness infrastructure, and at-home and point-of-care test adoption that has pulled testing volume out of centralized laboratories into retail pharmacies and telehealth-initiated test-and-treat pathways.

National governments and multilateral health organizations are amplifying this momentum. Governments across more than 40 countries have committed incremental funding to sentinel surveillance networks, with the U.S. CDC alone allocating over USD 900 million annually for influenza monitoring and vaccine strain selection. The WHO Global Influenza Surveillance and Response System (GISRS) coordinates data from 148 national influenza centers, each requiring validated diagnostic capacity. The European Commission earmarked EUR 220 million under Horizon Europe in 2024 for respiratory pathogen surveillance, directly stimulating demand for WHO-prequalified influenza assays across 27 member states. Together, these initiatives are creating the surveillance infrastructure and reimbursement scaffolding on which the Influenza

Diagnostics Market depends.

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Key Market Trends & Growth Drivers

Molecular Platform Migration

Hospital systems worldwide are retiring first-generation rapid antigen tests in favor of RT-PCR and isothermal amplification platforms that deliver sensitivities above 95%, compared with 50–70% for lateral-flow antigen devices. The gold standard used to be legacy culture-based approaches, and now molecular platforms are replacing them, cutting hospital turnaround times by 40–60% and delivering results in under 60 minutes. The U.S. Hospital Preparedness Program allocated USD 385 million in 2024 for laboratory modernization, with molecular influenza testing explicitly listed as an eligible expenditure, compressing legacy test volumes while expanding per-test revenue for the Influenza Diagnostics Market.

RT-PCR platforms continue to anchor the molecular segment, generating USD 0.54 Billion in 2025 revenue as hospital laboratory procurement cycles favor established vendors where the existing installed base reduces switching costs. CRISPR-based assays, projected to grow at a 10.0% CAGR through 2035—the fastest among all test-type sub-segments—combine molecular-level sensitivity with lateral-flow simplicity at a price point 30–40% below RT-PCR while maintaining specificity above 97%, positioning them to disrupt both the rapid antigen and molecular segments simultaneously as manufacturing scale improves through 2028.

Government Surveillance Funding

National influenza surveillance remains a pillar of pandemic preparedness. The WHO Global Influenza Surveillance and Response System (GISRS) coordinates data from 148 national influenza centers, each requiring validated diagnostic capacity. AI-enhanced quality control software is enabling labs to handle more samples without a commensurate increase in personnel, a key benefit as clinical labor shortages continue around the world. Machine-learning algorithms embedded in molecular analyzers are reducing hands-on technician time by an average of 25% per batch, according to a 2024 benchmarking study across 38 U.S. reference laboratories, with automated result interpretation cutting repeat testing rates by 12%.

In 2024, the European Commission earmarked EUR 220 million under Horizon Europe for respiratory pathogen surveillance, directly stimulating demand for WHO-prequalified influenza assays across 27 member states. By 2030, an estimated 35% of high-volume clinical laboratories will employ AI-driven pre-analytical sorting and result interpretation systems, translating into higher throughput per instrument, reduced error rates, and lower staffing costs that expand the economic viability of molecular testing in facilities that previously relied on cheaper antigen

tests.

At-Home and POC Test Adoption

Consumer comfort with self-testing—forged during the COVID-19 era—has transferred to influenza. The U.S. FDA cleared three new over-the-counter flu/COVID combination tests during 2024, collectively capturing an estimated 8% of all influenza tests performed in the U.S. that year. Pharmacy chains are stocking these products seasonally, converting what was once a clinical encounter into a retail transaction and expanding the addressable Influenza Diagnostics Market. Point-of-care settings are forecast to expand at a 9.85% CAGR to 2035, supported by decentralized care models, telehealth-initiated test-and-treat pathways, and employer-sponsored workplace testing programs.

Consumer self-testing for influenza is expected to expand beyond the U.S. and Europe into middle-income markets as manufacturing costs for lateral-flow and CRISPR-based devices decline below USD 5 per unit by 2028. This channel broadens the Influenza Diagnostics Market beyond traditional institutional buyers and introduces retail pharmacy chains and e-commerce platforms as significant distribution partners.

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Market Segment Insights

BY TEST TYPE

Rapid Influenza Diagnostic Tests: Dominant segment, capturing 44.0% of the Influenza Diagnostics Market share in 2025. Remaining the highest-volume test category despite lower sensitivity than molecular alternatives, deployed across emergency departments, urgent care clinics, and retail pharmacies where turnaround time under 15 minutes outweighs sensitivity limitations.

CRISPR-Based and Other Molecular Tests: Fastest-growing segment, projected to grow at a 10.0% CAGR through 2035. Emerging platforms with field-deployable form factors are gaining traction as manufacturing scale improves, positioning CRISPR-based assays to disrupt both the rapid antigen and molecular testing space.

RT-PCR: USD 0.54 Billion in 2025 revenue. Underpinned by hospital laboratory procurement cycles, RT-PCR remains the gold-standard sensitivity platform for hospital labs, with established vendors benefiting from a reduced-switching-cost installed base.

LAMP (Loop-Mediated Isothermal Amplification): Growing at a 6.20% CAGR. Isothermal simplicity makes LAMP devices well suited for decentralized testing sites lacking thermocycler

infrastructure.

BY END USER

Hospitals and Clinical Laboratories: Largest segment, holding 45.0% of the Influenza Diagnostics Market in 2025. Functioning as the primary gatekeepers for molecular test ordering during flu season, with large health systems increasingly standardizing on a single molecular platform across all sites, creating sticky vendor relationships and multi-year reagent rental contracts.

Point-of-Care Settings: Fastest-growing end-user segment, expanding at a 9.85% CAGR to 2035. The convergence of FDA-cleared OTC flu tests, telehealth-initiated test-and-treat pathways, and employer-sponsored workplace testing programs is pulling diagnostic volume out of centralized laboratories into decentralized channels.

Independent Diagnostic Laboratories: USD 0.37 Billion in 2025. Reference testing and insurance-billed panels sustain demand for independent laboratory capacity outside hospital systems.

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Regional Outlook

North America — Dominant Market (~40.0% Share, 2025)

North America commands approximately 40.0% of global Influenza Diagnostics Market revenue, anchored by a large installed base and a conducive reimbursement scenario. The United States accounts for over 85% of the North American Influenza Diagnostics Market revenue, supported by approximately 260,000 CLIA-certified laboratories and an established seasonal testing workflow, with the U.S. market projected to grow at a 5.80% CAGR through 2035 on CMS reimbursement clarity and a large hospital installed base.

Canada is growing at a 5.45% CAGR on provincial public-health laboratory network upgrades, supported by the interprovincial National Microbiology Laboratory reference network. Mexico is the fastest-growing North American market at a 6.70% CAGR, driven by the IMSS diagnostic modernization program, though both Canada and Mexico remain price-sensitive relative to the U.S. market.

Europe — Second Largest (~27.5% Share, 2025)

Europe's Influenza Diagnostics Market is shaped by the IVDR regulatory transition, which has consolidated the vendor landscape around manufacturers with the resources to navigate Class D conformity assessment. Germany leads regionally with 22.0% of regional revenue through university hospital molecular platform procurement, while the United Kingdom contributes

18.5% through NHS respiratory testing integration. Germany and the UK together represent over 40% of regional demand, with both markets actively shifting from antigen-based to molecular-first testing algorithms in acute-care settings.

France contributes 15.0% of regional revenue through Santé Publique France surveillance mandates, Italy contributes 11.5% via the InFluNet sentinel laboratory network, and Spain contributes 9.0% on Sistema Nacional de Salud diagnostic reforms. The Nordic countries hold 8.5% of regional revenue on high per-capita testing rates, Russia contributes 7.0% through its federal flu surveillance program, and the rest of Europe accounts for the remaining 8.5% on mixed adoption across Central and Eastern European markets. The EU's integrated Epidemic Intelligence system and harmonized IVD regulation continue to support structural demand across the region.

Asia-Pacific — Fastest-Growing Region (8.40% CAGR, 2026–2035)

Asia-Pacific is the fastest-developing region in the Influenza Diagnostics Market, powered by government-led laboratory buildout programs across China and India. The region accounted for 22.0% of global revenue in 2025. India is the fastest-growing country in the region at a 9.50% CAGR, driven by National Health Mission rapid test deployment that plans to equip 12,000 primary health centers with rapid molecular testing capability by 2028, creating a greenfield market opportunity worth an estimated USD 85 million annually. China is growing at an 8.60% CAGR on CDC-mandated provincial laboratory upgrades.

ASEAN markets are growing at a 9.10% CAGR on WHO-supported sentinel surveillance scale-up, South Korea is growing at 6.80% on HIRA reimbursement for molecular flu tests, and Japan—growing at a comparatively steady 5.90% CAGR—maintains the highest per-capita testing rate in the region, driven by a culturally embedded flu-awareness campaign and universal health coverage that reimburses both rapid and molecular tests. China, India, and ASEAN countries are collectively building the laboratory infrastructure that anchors the region's growth leadership.

South America — Growing Presence (~5.5% Share, 2025)

Brazil dominates the South American Influenza Diagnostics Market, contributing 52.0% of regional revenue through its Unified Health System (SUS), which procures centralized diagnostic kits for over 5,500 public hospitals. Argentina contributes 22.0% of regional revenue via the ANLIS Malbáran reference laboratory network, while the rest of South America accounts for the remaining 26.0% on PAHO-assisted flu sentinel programs. PAHO's revolving fund mechanism enables smaller economies to access WHO-prequalified rapid tests at discounted pricing, sustaining baseline demand across the region.

Middle East and Africa — Emerging Opportunity (~5.0% Share, 2025)

The Middle East & Africa represent the smallest but a strategically significant portion of the

Influenza Diagnostics Market. Egypt is the fastest-growing country in the region at an 8.10% CAGR as the WHO Eastern Mediterranean regional hub, while South Africa is growing at 7.80% on the NICD respiratory surveillance program, which operates the continent's most advanced influenza surveillance network with over 40 sentinel sites. Saudi Arabia is growing at 7.20% as Vision 2030 funds 22 new hospital complexes with integrated molecular laboratories, the UAE is growing at 6.90% on medical tourism and private hospital density, and the rest of the region is growing at 6.50% on donor-funded infectious disease programs.

Competitive Landscape and Recent Developments

The Influenza Diagnostics Market is moderately concentrated, with the top five players anticipated to possess a 55–60% revenue share. The Herfindahl-Hirschman Index (HHI) sits between 1,200 and 1,500, representing a fairly competitive structure with prominent molecular platform providers and niche rapid-test producers. Recent M&A activity has accelerated vendor consolidation, including the merger of Quidel and Ortho Clinical Diagnostics into QuidelOrtho Corporation.

The competitive landscape is stratified between full-spectrum molecular platform leaders with global distribution, rapid molecular and antigen dual-portfolio providers, and multiplex syndromic panel specialists capturing the fastest-growing point-of-care and respiratory co-infection testing segments.

KEY COMPANIES AND RECENT MILESTONES

Roche Diagnostics (2024–2025): Holds an estimated 12–15% of global Influenza Diagnostics Market revenue through its cobas Liat Flu/COVID and cobas 6800/8800 respiratory panel platforms. Full-spectrum molecular portfolio with global distribution reinforces leadership across hospital and reference laboratory channels.

Abbott Laboratories (2024–2025): Holds an estimated 10–13% of global revenue through its ID NOW Influenza A&B and BinaxNOW Flu platforms. Rapid molecular and antigen dual-portfolio positioning supports both point-of-care and laboratory-based testing pathways.

QuidelOrtho Corporation (2024–2025): Holds an estimated 8–11% of global revenue through its Sofia Influenza A+B FIA and Solana Influenza platforms, following the merger of Quidel and Ortho Clinical Diagnostics. Integrated immunoassay-to-molecular migration strategy positions the company across the rapid-to-molecular transition.

Hologic Inc. (2024–2025): Holds an estimated 6–9% of global revenue through its Panther Fusion Flu A/B/RSV platform, reinforcing a high-throughput automated molecular positioning for high-volume hospital laboratories.

bioMérieux SA (2024–2025): Holds an estimated 5–8% of global revenue through its BioFire

FilmArray Respiratory Panel, maintaining its position as the multiplex syndromic panel leader as combination flu/COVID/RSV testing expands.

Becton, Dickinson and Company (2024–2025): Holds an estimated 4–7% of global revenue through its BD Veritor Plus Flu A+B and BD MAX Respiratory platforms, reinforcing a point-of-care antigen with molecular backup positioning.

Cepheid, a Danaher company (2024–2025): Holds an estimated 4–6% of global revenue through its Xpert Xpress Flu/RSV platform, reinforcing a CLIA-waived molecular positioning for near-patient testing use.

Future Outlook: 2026–2035

By 2030, AI-integrated diagnostic workflows will become the operating system of high-volume influenza testing. An estimated 35% of high-volume clinical laboratories will employ AI-driven pre-analytical sorting and result interpretation systems, translating into higher throughput per instrument, reduced error rates, and lower staffing costs that expand the economic viability of molecular testing in facilities that previously relied on cheaper antigen tests. The diagnostic industry is converging toward modular platforms capable of running influenza, COVID-19, RSV, and strep panels on a single cartridge, a platform economics model that favors vendors controlling both the analyzer and consumable supply chain; by 2032, multiplex panels could represent over 30% of all influenza tests performed globally.

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