

MARKET REPORT



Vitamin D Testing Market, By Vitamin Types (Vitamin D2, and Vitamin D3) By Test Type (1, 25-Dihydroxy, and 25-Hydroxy Vitamin D Test) By Indication (Vitamin D Deficiency, Thyroid Disorders, Rickets, Malabsorption, and Osteoporosis), By Application (Personal Care, Functional Food & Beverages, Pharmaceuticals, and Animal Feed), By End-Use (Pregnant Women, Adults, Pediatrics, and Geriatric) and By Ge

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REPORT HIGHLIGHT

Vitamin D testing market was valued at USD 698.4 million by 2019, growing with 10.2% CAGR during the forecast period, 2020-2026.

Vitamin D is an essential nutrient for keeping bones and teeth healthy by maintaining the level of calcium and phosphorous. This vitamin is present in foods, including cereals, milk, eggs, and fatty fish. Vitamin-D can be utilized from the exposure to the sun and it works as an immune modulator. Vitamin D deficiency has more prevalence in the geriatric populations, neonates, pregnant women, infants, and children. Deficiency in the vitamin-D can cause chronic ailments like autoimmune disease, bone disorders, cystic fibrosis, Crohn's disease, asthma, psoriasis, diabetes, cancer, etc. Hence testing is helpful to screen and monitor such disorders. Vitamin-D testing is used in reducing the incidence of autoimmune diseases to determine the high risk of deficiency. This test has significant potential in determining the bone softness, bone weakness, bone malformation in children, and fractures.

Market Dynamics

Increasing prevalence of chronic ailments such as asthma, diabetes, cancer, bone disorders, cystic fibrosis, and Crohn's disease is driving the global vitamin D testing market growth. As per the Global Asthma Network Organization in 2018, asthma has affected around 339 million people of all ages in different parts of the world. Asthmatic patients have a common deficiency of vitamin D which propels the product demand. The study conducted by the International Archives of Allergy and Immunology found that asthmatic patients have 41.8% moderate vitamin D deficiency. Thus, the rising cases of asthma would, in turn, boost the demand for this testing significantly.

Furthermore, rising cases of vitamin D deficiency support industry growth. For example, the National Center for Biotechnology Information (NCBI) (2020) stated that in the U.S. around 1 billion people are suffering from vitamin D deficiency with the highest prevalence in the elderly, asthmatics, and obese patients. Due to such high prevalence, the government of different countries is actively involved in organizing awareness programs regarding vitamin D testing. For example, in April 2018, the Food Safety and Standards Authority of India (FSSAI) launched 'Project Dhoop', to ensure vitamin D absorption in students through natural sunlight. Other factors such as technological advancements, new product launch coupled with rising investment by key players will support the industry growth. On the flip side, the lack of awareness in developing regions is expected to hamper the market growth to some extent. In addition, strict government rules and regulations are predicted to impede market growth in the coming future.

Vitamin Types Takeaway

Depending on vitamin types, the market is categorized into D2 and D3. Of these, the D2 category accounted for the largest market share in 2019 and is anticipated to witness noteworthy growth during the study period. This is mainly due to the rising prevalence of rickets, hypoparathyroidism, and kidney disease all across the globe.

On the other hand, the D3 segment is estimated to expand at the highest growth rate by the end of 2026 owing to supplementary diets consumptions among the people.

Technique Takeaway

In terms of technique, the market is segmented into ELISA, HPLC, LC-MS, Radioimmunoassay, and others. This Radioimmunoassay (RIA) segment has the highest market share as it measures antibody with specificity for 25-hydroxy vitamin D. Other segments like ELISA, HPLC, LC-MS, and many others are also showing growth due to rising the prevalence of vitamin D deficiency cases all over the world.

Test Types Takeaway

In terms of test type, the overall market is bifurcated into the 25-Hydroxy Vitamin D Test and 1, 25-Dihydroxy Vitamin D Test. Out of this, 25-Hydroxy Vitamin D Test 1 is a frequently used method of testing due to the best result indication of how much vitamin D the body contains. In addition, this test provides whether vitamin D level is too high or too low in the body in an efficient way. The segment growth is attributed to the development of new and advanced kits by key players. For instance, in March 2020 Thermo Fisher Scientific launched Thermo Scientific Cascadion that represents the new class of fully automated liquid chromatography-mass spectrometry (LC-MS) technique. This Cascadion SM 25-Hydroxy assay is considered to be the first LC-MS/MS 25-Hydroxy Vitamin D assay to be run on a fully automated clinical analyzer. Such introductions would, in turn, support the segment growth.

On the other hand, the 25-Dihydroxy Vitamin D Test segment is estimated to witness the highest growth during the period of forecast owing to a hasty increase in the occurrence of cardiovascular disorders all over the world.

Indication Takeaway

In terms of indication, the global market is divided into thyroid disorders, rickets, malabsorption, osteoporosis, and vitamin d deficiency. Of this, rickets accounted for the largest market share in 2019 and are anticipated to grow exponentially during the forecast period. This growth is primarily owing to the increased number of children suffering from malnutrition due to the deficiency of micronutrients. As per the World Health Organization (WHO), in 2017 the estimated more than two billion people suffer from micronutrient deficiency globally.

Furthermore, vitamin D deficiency is the most common disorder that supports segment growth, followed by osteoporosis, thyroid disorders, rickets, and Malabsorption.

Application Takeaway

Depending on the application, the industry is divided into functional food & beverages, personal care, pharmaceuticals, and animal feed. Out of this, the functional food & beverage segment has the highest share owing to the increasing awareness about the health. As per the Institute of Food Technologists, globally, fortified/functional and naturally healthy food sale was valued USD 267 billion and USD 259 billion respectively in February 2020.

Other segments like pharmaceuticals, personal care, and animal feed are also growing at faster rates owing to growing health awareness among the people.

End-user Takeaway

In terms of end-use, the market is bifurcated into adults, pediatrics, pregnant women, and geriatric. This geriatric population has the highest share for this market in 2019 due to the rising prevalence of chronic ailments in this population. Due to this fact, key players are actively engaged in developing testing kits that can be done at home. For instance, in March 2019, U.S. based dietary supplements manufacturer, Thorne Research, Inc., launched home health tests for individual biomarkers to uncover health insights by determining the Vitamin D deficiency, and heart health. This test helps users to add nutritional supplements to improve health outcomes with customized plans for what to eat, and how to exercise. Such introductions will support the segment growth to a great extent. On the contrary, the pregnant women category is projected to grow with a promising growth rate during the study period.

Regional Takeaway

Regionally, the overall market is divided into North America, Middle East & Africa, Asia Pacific, Latin America, and Europe. North America has registered for the majority of share in 2019 owing to the rising geriatric population and increasing prevalence of vitamin deficiency disorders. As per the National Center for Biotechnology Information in 2020, home residents and hospitalized patients in the United States has around 50-60% of vitamin D deficiency rate owing to the increased geriatric population in this region followed by Europe. In addition, technological advancements for diagnosis chronic disorders like rickets in children and infants, diabetes, cancer, etc. are fuelling the regional market growth. In North America, rickets is most commonly seen in children.

On the other hand, the Asia Pacific is anticipated to be the fastest-growing region throughout the forecast owing to the growing prevalence of chronic disorders such as osteoporosis, rickets, cancer, and which require vitamin D testing. This is primarily due to a surge in vitamin D deficiency in this region. As per the National Center for Biotechnology Information in 2020, 80% of the geriatric population in Pakistan, India, and Bangladesh have Vitamin D deficiency. This increase in vitamin D deficiency among the elderly population has enhanced the vitamin D testing market over the study period.

COVID-19 Impact

Vitamin D is the immunity booster as it helps to fight off invading bacteria and viruses. Hence during the current COVID-19 pandemic the vitamin D testing has shown great importance. Vitamin D levels are severely low in the aging population hence the people are at high risk of viral infection due to COVID-19. A recent study from Northwestern University has found that patients with lower levels of vitamin D has higher COVID-19 mortality rates. Thus, vitamin D testing has shown moderate growth during the COVID-19 pandemic owing to an increase in the coronavirus infection all over the world.

Key Vendor Takeaway

The leading players of the global Vitamin D Testing market include Danaher Corporation, Siemens Corporation, F. Hoffmann-La Roche Ltd, Abbott Laboratories, Hologic, Inc., BioKit SA, Tosoh Bioscience, bioMérieux SA, DiaSorin S.p.A and Quest Diagnostics, Inc.

Companies are actively involved in strategic mergers and acquisitions to capture a large customer base. In October 2018, Roche has acquired been UK-based immuno-oncology company Tusk Therapeutics with USD 759 Million. Furthermore, in February 2019, Roche acquired Spark Therapeutics for developing and delivering gene therapies as well as for initiating the commercial trials of new testing kit related to vitamin deficiency.

The market size and forecast for each segment and sub-segments has been considered as below:

Historical Year - 2015 to 2018

Base Year - 2019

Estimated Year - 2020

Projected Year - 2026

TARGET AUDIENCE

Traders, Distributors, and Suppliers

Manufacturers

Government and Regional Agencies

Research Organizations

Consultants

Distributors

SCOPE OF THE REPORT

The scope of this report covers the market by its major segments, which include as follows:

GLOBAL VITAMIN D TESTING MARKET KEY PLAYERS

Danaher Corporation

Siemens Corporation

Hoffmann-La Roche Ltd.

Abbott Laboratories

Hologic, Inc.

BioKit SA

Tosoh Bioscience

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Biomérieux SA

DiaSorin S.p.A.

Quest Diagnostics, Inc.

GLOBAL VITAMIN D TESTING MARKET, BY VITAMIN TYPES

Vitamin D2

Vitamin D3

GLOBAL VITAMIN D TESTING MARKET, BY TECHNIQUE

Enzyme-Linked Immunosorbent Assay (ELISA)

High-Performance Liquid Chromatography (HPLC)

Liquid Chromatography-Mass Spectrometry (LC-MS)

Radioimmunoassay

Others

GLOBAL VITAMIN D TESTING MARKET, BY TEST TYPE

25-Hydroxy Vitamin D Test

1, 25-Dihydroxy Vitamin D Test

GLOBAL VITAMIN D TESTING MARKET, BY INDICATION

Rickets

Thyroid Disorders

Vitamin D Deficiency

Malabsorption

Osteoporosis

Others

GLOBAL VITAMIN D TESTING MARKET, BY APPLICATION

Functional Food & Beverages

Personal Care

Pharmaceuticals

Animal Feed

GLOBAL VITAMIN D TESTING MARKET, BY END-USE

Adults

Pediatrics

Pregnant Women

Geriatric

GLOBAL VITAMIN D TESTING MARKET, BY REGION

North America

The U.S.

Canada

Europe

Germany

France

Italy

Spain

United Kingdom

Rest of Europe

Asia Pacific

India

China

South Korea

Japan

Singapore

Rest of APAC

Latin America

Brazil

Mexico

Argentina

Rest of LATAM

The Middle East and Africa

Saudi Arabia

United Arab Emirates

Rest of MEA

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These experts are dedicated to creating concrete market data analysis in various industries such as Healthcare, Bulk Chemicals, Semiconductors and Electronics, Foods and Beverages. We strive to develop meaningful and evidence-based research data that helps our clients, empowering organizations and brands of all sizes with strategic analysis, accurate data, and consumer trends.

We aim to be the number one choice for various clients who require credible data to make vital business decisions. We wish to be a trusted and reliable analytics partner to major business organizations.

We understand that critical business decisions can be taken only when verified, authentic information is available. Therefore, our experts work meticulously to provide our clients with the accurate data, so that they need not spend time in verifying it.

It is also our goal to help our clients ignore traditional research methods that require a large amount of capital, manpower, and most important of it all – the time. We know that these factors are precious to a company and always follow the latest research techniques that produce the required result in a short span of time.

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