Digital PCR (dpcr) and Real-Time PCR (qpcr) Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global dPCR and qPCR Market Report

The dPCR and qPCR market by revenue is expected to grow at a CAGR of over 9% during the period 2020–2025.

The global digital PCR (dPCR) and the real-time PCR (qPCR) market is one of the dynamic and fast-growing segments in the diagnostic and life sciences industries. The dPCR and qPCR market is growing at a significant rate due to the rising incidence of infectious diseases and genetic disorders, continuous technological advancements in PCR technologies, the successful completion of the human genome project, and increasing R&D investments, funds, and grants as well as the increasing use of biomarker profiling for disease diagnostics. The surge in the growth can also be attributed to the growing prevalence/incidence of epidemics and pandemics such as the COVID-19 pandemic.

The introduction of automated analyzers with advanced connectivity, and high throughput, with reduced waiting time and portability, the increase in the accuracy of the devices with the usage of the PCR specific test kits, ability to perform the large volume of tests in a shorter duration of time are expected to influence the market. Moreover, continued efforts by manufacturers to develop novel dPCR and qPCR systems and kits to use in molecular testing are likely to further propel the growth of the dPCR and qPCR market. New systems are expected to offer highly automated workflows and quick turnaround times than the current digital PCR platforms, which are likely to provide a significant competitive advantage.

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The following factors are likely to contribute to the growth of the dPCR and qPCR market during the forecast period:

Surge in Demand for PCR Tests due to COVID-19

Increase in Demand for POC PCR Diagnostics

Prevalence of Infectious Disease and Genetic Disorder

Advances in PCR Technology

The study considers the present scenario of the dPCR and qPCR market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global dPCR and qPCR Market Segmentation

In 2019, the Real-time PCR (qPCR) segment dominated the market and accounted for a share of over 90%. One of the major reasons for the dominance of qPCRs is that they are widely used in infectious disease diagnosis and research projects. Real-time PCRs (qPCRs) have been well-established as credible and capable technology and are relied upon by researchers for their speed, sensitivity, specificity, and convenience. Several laboratories in developing countries are upgraded their infrastructure and technical training to perform PCR-based diagnosis for infectious diseases, thereby driving the segment growth.

The usage of a wide array of several standard reagents and test kits to perform several PCR-based tests is a major factor responsible for the growth of the consumable segment. The usage of consumables is reoccurring in nature, which is generating continuous revenue for vendors. Therefore, several renowned vendors are manufacturing consumables for PCR instruments. In recent years, the demand for consumables is increasing at a significant rate; hence, vendors are offering a wide array of reagents and other associated consumables to perform a range of procedures. Both global and local/regional players are offering a diverse range of consumables catering to the end-users requirements. The high prevalence of several infectious diseases across the globe has increased the demand for PCRs.

The clinical end-user segment dominates the market as PCRs play a significant role in the detection of DNA methylation, recognition of viruses and protozoa in infectious diseases, estimation of gene copy number aberrations, and primer extension. The application of qPCR is high in the clinical application end-user segment due to the high cost of dPCR. As real-time PCR assays offer immediate results for the detection of bacteria, clinicians can confirm the infection status of the patient more rapidly than culture methods, allowing more specific and timely administration of appropriate therapy. The research application segment is limited to users in developed countries. The segment accounted for a share of over 44% in the global dPCR and qPCR market. Gene expression, genotyping, sequencing cloning, mutagenesis, and methylation are the major applications for PCRs in the research segment.

Diagnostic laboratories are the largest end-user of PCR instruments and consumables than other segments. They use PCR instruments for diagnosis purposes. Commercial and public health laboratories prefer the latest diagnostic equipment. Their investment focuses on advanced equipment for accurate results to attract customers. Private laboratories have expanded their footprints, especially in developing countries, which has stimulated the growth prospects. Moreover, the demand for standalone reference laboratories is growing gradually owing to the prevalence of pandemic conditions, or the outbreak of unexpected infectious diseases, requiring immediate diagnosis of the diseases for the large population in a shorter period.

By Product

- Systems/Analyzers & Software
- Consumables

By Application

- Clinical
- Research
- Forensic

By Technology

Real-Time PCR

Digital PCR

By End-user

Hospitals

Diagnostic Laboratories

Research Laboratories

Pharma & Biotech Companies

Forensic Laboratories

Others

Insights By Geography

In 2019, North America accounted for a market share of 45% of the global digital PCR (dPCR) and real-time PCR (qPCR) market. Several factors are responsible for the growth of the market in the region. However, the increase in the target population and the high incidence of several infectious disease diagnostics are driving the PCR demand. There has been increasing in the prevalence of sexually transmitted diseases in North America. In 2018, over 37,832 people were confirmed HIV positive in the US and other states. A significant increase in several infectious diseases such as hepatitis, TB, and HIV was reported in the US alone. Approximately every 3 minutes, one person in the US is diagnosed with blood cancer. An estimated 176,200 people in the United States are diagnosed with leukemia, lymphoma, or myeloma in 2019. The government expenditure on clinical diagnostics & laboratory services has grown by 3% during the period 2010–2017, reaching $96.6 billion. Advances in technology are likely to increase the role of PCR tests in detecting, treating, and monitoring diseases. PCR is widely used in hospital setups as the conventional technique of culture-based disease diagnosis requires long isolation time and hospital admission.

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Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Insights By Vendors

The global Digital PCR (dPCR) and Real-time PCR (qPCR) market is highly dynamic with the presence of global, regional, and local players, offering a diverse range of analyzers, software, and reagents for end-users. Agilent Technologies, Bio-Rad Laboratories, Danaher, F. Hoffmann-La Roche, QIAGEN, Takara Biotech, and Thermo Fisher Scientific are the key players operating in the global dPCR and qPCR market. Global players are focusing on developing innovative products and expanding their product portfolio to remain competitive in the market. They are investing extensively in R&D and product development activities to expand their product portfolio. Manufacturers are continuously focusing on product launches & development and offering PCR instruments and software with new features to increase their market presence.

Vendors are focusing on developing and commercializing innovative analyzers, dPCR, COVID-19 PCR rapid test kits, and consumables to remain competitive and gain a significant presence in the market. New product approvals/launches coupled with R&D activities help vendors to expand their presence, enhance market growth during the forecast period, and sustain their market position in the global qPCR and dPCR market.

Prominent Vendors

Agilent Technologies Inc.

Quidel

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QIAGEN

Takara Bio

Thermo Fisher Scientific

Bio-Rad Laboratories

Danaher

F.Hoffmann-La Roche

Other Prominent Vendors

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PentaBase

Hologic

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Luminex

Mobidiag

PathoFinder

Acupath Laboratories

ALTRU DIAGNOSTICS

Altona Diagnostics

BGI

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BioCore

Fosun Pharma

General Biologicals Corporation (GBC)

GeneStore

Gnomegen

KogeneBiotech

Key Questions Answered:

1. What is the Digital PCR (dPCR) and Real-time PCR (qPCR) market size in 2020?
2. What are the factors impacting the growth of the dPCR and qPCR market share?
3. What is the growth of the digital PCR market?
4. Who are the leading vendors in the dPCR and qPCR market, and what are their market share?
5. What is the impact of the COVID-19 pandemic on the dPCR and qPCR market share?

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