

Direct to Consumer Testing Industry: Global Markets

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Abstracts

Summary:

Traditionally, diagnostic tests are prescribed by the medical practitioners, approved by healthcare providers and the results are discussed with the patients. The direct-to-consumer (DTC) or at-home tests have transformed conventional testing and have enabled consumers to order their tests from the convenience of their homes, at any time. With no physician approval required, the DTC tests provide the consumers with freedom to order any test at an affordable cost. Moreover, they have access to the test results, which they can then share with their physicians, if they wish to.

There are several DTC companies across the globe that offer various types of personalized testing. While the majority of these tests are genetic tests, routine biomarker tests and novel microbiome tests have also entered this booming market. The applications of DTC tests range from ancestry and genealogy testing, to screening for diseases in couples, to identification of genes associated with certain heritable diseases and cancers. Advances in genotyping custom arrays have enabled the identification of traits that are linked to fitness, allergies, sleep disorders, neurological diseases, and many other health and wellness aspects.

Next generation sequencing (NGS) techniques and reducing costs of genetic sequencing have led to significant adoption of whole genome sequencing (WGS) for routine testing. Companies such as Veritas and Nebula Genomics now offer DTC WGS products for less than \$REDACTED.

Leading players, such as 23andMe, are strategizing new business models to foster growth in this market. Partnerships with healthcare and pharmaceutical companies to drive research in disease pathogenesis and drug discovery are accelerating. Also, many companies have partnered with large healthcare networks such as PWN Health to

provide in-house licensed physicians, and thereby, add reliability to their products. The DTC testing market is driven by increasing consumer demand for at-home testing kits, expanding access to these products through online and retail options, decreasing test costs, and expanding applications of these tests.

The market is, however, restrained by lack of proper regulation for DTC tests. Data privacy and security are ongoing challenges. Lack of population-specific databases has also delayed the adoption of tests by many populations.

As new players enter the emerging markets and population-based projects also expand, the DTC testing market is expected to have new opportunities in these regions. Growing consumer awareness and improving lifestyles are also expected to contribute to further growth of this market. Many players, including Quest Diagnostics, Everlywell and many others, launched COVID-19 at-home testing kits. Sales from these kits are expected to boost market growth in the coming years.

Report Scope:

BCC Research's new report, "DTC Testing Industry: Global Markets," provides a comprehensive analysis of the DTC testing market in a global context, including market forecasts and sales through 2025. The report analyzes the market by segmenting it into the different test categories: health and wellness tests, ancestry tests, genetic health risk tests, pharmacogenetics tests, carrier screening tests, overall tests, and others.

This study segments the DTC testing market by distribution channel into online, retail and diagnostic labs. The market is also assessed in all of the geographic regions, including North America, Europe and emerging markets. The emerging markets include countries and regions like India, China, Korea, Taiwan, Africa, Australia, New Zealand, Canada and Latin America.

The report features new product developments and patents boosting the growth of this market in the global context.

The new BCC report provides comprehensive profiles of market players in the industry. The industry structure chapter focuses on the changing market trends, market players and their leading products. This chapter also covers the mergers and acquisitions and any other collaborations or partnerships that happened during the evaluation period of this report that are expected to shape the industry.

The factors such as strengths, weaknesses, threats and opportunities that are expected to play a role in the DTC testing market are evaluated in detail.

The report excludes at-home pregnancy and fertility tests. COVID-19 tests are covered, but not their sales. Provider-dependent at-home tests are not included in this report.

Report Includes:

29 data tables and 40 additional tables

An overview of the global market for Direct-to-consumer (DTC) testing, and discussion on its technology background

Estimation of the market size and analyses of global market trends, with data from 2018, 2019, estimates for 2020, with projections of compound annual growth rates (CAGRs) through 2025

Comparative study on traditional vs. DTC testing and identification of new opportunities, challenges, and technological changes within the industry

Market share analysis of DTC testing based on type, applications, and distribution channel and evaluation of market size, market forecast and regulatory landscape of DTC testing industry

Impact analysis of COVID-19 on Direct-to-consumer (DTC) testing industry

Coverage of events like mergers & acquisitions, joint ventures, collaborations or partnerships, and other key market strategies and details of the investments and new product launches in the market

Comprehensive company profiles of market leading participants, including 23andMe, EasyDNA, Ancestry, Color Genomics, Full Genomes, and Genesis HealthCare

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(23MOFANG)
CIRCLE DNA (PRENETICS LTD.)
COLOR GENOMICS INC.
DANTE LABS
EASYDNA
EVERLYWELL INC.
FITNESS GENES LTD.
FULL GENOMES CORP.
HELIX OPCO LLC
IDENTIGENE LLC (ACQUIRED BY DNA DIAGNOSTICS CENTER)
KARMAGENES SA
LABORATORY CORP. OF AMERICA HOLDINGS
LETSGETCHECKED (PRIVAPATH DIAGNOSTICS LTD.)
LIVING DNA LTD.
MAPYMYGENOME INDIA LTD.
MYHERITAGE LTD.
MICROBIOME LABS LLC
NEBULA GENOMICS, INC.
OMECARE (FORMERLY KNOWN AS PATHWAY GENOMICS)
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COMPANIES MENTIONED

23ANDME

Ancestry.com Llc

Chengdu Twenty-three Rubik Cube Biotechnology Co. Ltd. (23mofang)

Circle Dna (prenetics Ltd.)

Color Genomics Inc.

DANTE LABS

Easydna

Everlywell Inc.

Fitness Genes Ltd.

FULL GENOMES CORP.

HELIX OPCO LLC

Identigene Llc (acquired By Dna Diagnostics Center)

Karmagenes Sa

LABORATORY CORP. OF AMERICA HOLDINGS

Letsgetchecked (privapath Diagnostics Ltd.)

Living Dna Ltd.

Mapymygenome India Ltd.

Microbiome Labs Llc

Myheritage Ltd.

Nebula Genomics, Inc.

Omecare (formerly Known As Pathway Genomics)

Psomagen Inc.

Quest Direct

Thryve (quantbiome Inc.)

Veritas Genetics International Ltd.

VIOME INC.

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