

DNA/RNA Sample Extraction and Isolation Market - A Global and Regional Analysis: Focus on Product, Technology, Application, End User, and Region - Analysis and Forecast, 2023-2033

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Abstracts

Global DNA/RNA Sample Extraction and Isolation Market Overview

The global DNA/RNA sample extraction and isolation market is projected to witness significant growth in the forecast period from 2023 to 2033. Furthermore, the market's value in 2022 was estimated at \$2.26 billion, and it is anticipated to reach \$4.79 billion by 2033, demonstrating a Compound Annual Growth Rate (CAGR) of 7.07% during this period. This growth can be attributed to the increasing demand for genomic analysis in research, clinical diagnostics, forensic applications, and the prevalence of diseases, alongside the adoption of new technologies. The market encompasses various technologies, reagents, instruments, and services designed to extract and isolate high-quality nucleic acid samples from biological specimens.

Market Lifecycle Stage

The global DNA/RNA sample extraction and isolation market is in a mature phase. Basic methods for DNA/RNA extraction have been in use for decades. However, recent years have witnessed improvements and innovations in extraction methods, particularly with the advent of next-generation sequencing and the growing demand for rapid testing, as seen during the COVID-19 pandemic. New technologies and devices that offer faster, more efficient, or more cost-effective extraction methods could rejuvenate the market, potentially pushing it back into a growth phase.

Industry Impact

The DNA/RNA sample extraction and isolation market has played a fundamental role in the advancement of modern biotechnology, clinical diagnostics, and research. One of its most significant impacts is evident in the field of medical diagnostics and personalized medicine. Efficient extraction and isolation of DNA/RNA have paved the way for the development of tests that can detect diseases at earlier stages. This early detection often leads to more effective treatments and better prognoses for patients. Moreover, this technology has transformed the concept of treatment from detection only to include personalized treatment. Personalized medicine tailors treatments based on an individual's genetic makeup, contributing to more effective outcomes with fewer side effects.

In addition, the research and development sector has benefited greatly from advancements in DNA/RNA extraction techniques. Many scientific studies rely on the ability to study genetic material accurately. Efficient and reliable extraction methods enable researchers to delve deeper into genetic studies, explore evolutionary patterns, and undertake projects like genome sequencing with greater precision. This precision and reliability accelerate discoveries, leading to a more profound understanding of genetics and its role in various domains, from evolution to disease propagation.

In essence, the DNA/RNA sample extraction and isolation market has not only supported but catalyzed numerous breakthroughs in both medicine and research. Its influence continues to grow as methods become more refined and accessible, promising even more revolutionary findings in the future.

Market Segmentation:

Segmentation 1: by Product

Consumables

Kits

Reagents

Instruments

Consumables to Dominate the Global DNA/RNA Sample Extraction and Isolation

Market (by Product)

Consumables are expected to dominate the global DNA/RNA sample extraction and isolation market (by product). This is primarily due to their extensive use in almost all applications related to DNA/RNA sample extraction and isolation. The increasing use of media, kits, and reagents is expected to drive significant growth in this segment.

Segmentation 2: by Technology

Consumable-Based Technology

Silica-Based

Magnetic Particle Technology

Other Technologies

Instrument-Based Technology

Automated Spin Column-Based

Magnetic Bead-Based

Automated Liquid Handling

The technology segment is based on different technologies of consumables and instruments. The technology segment also includes the market size and forecast of DNA and RNA-based products for each consumable's technologies. On the other hand, the instruments segment includes the market size and forecast of different throughputs, such as low, medium, and high, at each instrument technology segment.

In consumable-based technology, the silica-based segment holds the larger share in 2022. However, magnetic particle technology is expected to witness the highest CAGR in the forecast period 2023-2033.

In instrument-based technology, the magnetic bead-based segment holds the larger share in 2022; however, the automated spin column-based segment is expected to witness the highest CAGR in the forecast period 2023-2033.

Segmentation 3: by Application

PCR

NGS

Cloning

Microarray

Blotting Techniques

Other Applications

PCR to Dominate the Global DNA/RNA Sample Extraction and Isolation Market (by Application)

Based on application, the global DNA/RNA sample extraction and isolation market was dominated by the PCR segment in FY2022. Nowadays, PCR is usually used in several laboratories around the world, as it amplifies DNA further, allowing the analysis of even very small amounts of nucleic acid. With growing technological advancements in molecular biology techniques, PCR has been utilized in several fields, including disease diagnosis, DNA profiling, precision medicine, and gene expression.

Segmentation 4: by End User

Clinical Diagnostic and Forensic Laboratories

Research Academics and Institutions

Pharmaceutical and Biotechnology Companies

Contract Research Organizations

Others

Among end users, research academics and institutions held the larger share of 46.74% in 2022. However, clinical diagnostic and forensic laboratories is expected to witness the highest growth of 7.29% in the forecast period 2023-2033.

Segmentation 5: by Region

North America

Europe

Asia-Pacific

Middle East and Africa

Latin America

China dominated the Asia-Pacific market in 2022 with a share of 8.18%. Moreover, Asia-Pacific is expected to register the highest CAGR of 8.12% during the forecast period 2023-2033. The DNA/RNA sample extraction and isolation market in the Asia-Pacific (APAC) region is witnessing significant growth, driven by various factors, including increasing demand for molecular diagnostics, genomics research, and the rise in infectious diseases. Several new and advanced sequencing techniques, such as whole genome sequence and single-cell sequencing, are being implemented to help enable researchers to utilize disease-specific DNA and RNA information to improvise therapeutic and diagnostic research in the Asia-Pacific region. In recent years, genomic applications, enabling personalized interventions, have expanded in the region to include targeted use of pharmaceuticals and nutritional genomics.

Recent Developments in the Global DNA/RNA Sample Extraction and Isolation Market

In July 2023, QIAGEN N.V. announced the launch of the QIAseq normalizer kits. This is a fast, convenient, and cost-effective method for pooling different DNA libraries.

In December 2020, Autogen, Inc. launched an automated workflow, NeXTRACT 48, for the rapid extraction of viral DNA and/or RNA from a variety of samples, including VTM, UVT, and sputum.

In October 2020, Purigen Biosystems launched the Ionic Cells to Pure DNA Low Input Kit for researchers working with limited biological samples, which enables extraction and purification of high-quality DNA for the rapid investigation of genetic abnormalities or examination of disease treatment effects.

In January 2021, OraSure Technologies, Inc.'s product OMNIgene ORAL (OM-505) saliva collection kit was included in the Emergency Use Authorization (EUA) granted to Ambry Genetics for use in its Ambry COVID-19 RT-PCR saliva test.

In March 2020, Zymo Research Corporation partnered with Tecan to launch a ready-to-go processing solution to streamline viral DNA/RNA extraction from nasopharyngeal swabs, oropharyngeal swabs, saliva, sputum, plasma, and serum.

Demand – Drivers, Restraints, and Opportunities

Market Demand Drivers:

Growing Adoption of Genetic Tests Increasing Demand for DNA/RNA Sample Extraction and Isolation: The growing adoption of genetic tests has ushered in a transformative era in healthcare, research, and personalized medicine. These tests, which encompass a wide range of applications, from diagnosing genetic disorders to uncovering ancestry information, have become increasingly popular among individuals and healthcare providers alike. As this adoption curve continues to climb, it brings a significant and expanding demand for DNA/RNA sample extraction and isolation methods.

Market Restraints:

Lack of Awareness and Availability of DNA/RNA Extraction and Isolation Kits in Underdeveloped Countries: The limited awareness and understanding of DNA/RNA sample extraction and isolation techniques in underdeveloped countries represent a critical challenge in the field of molecular biology and genetic research. These regions often face significant obstacles when it comes to accessing and implementing advanced scientific methods, including those related to genetic material processing.

Market Opportunities:

Technological Advancements in DNA/RNA Isolation and Extraction Processes:

Technological advancements in DNA/RNA isolation processes, including spin-column and automation in magnetic beads methods, have revolutionized molecular biology and genetics research. These innovations have made nucleic acid isolation more efficient, reliable, and scalable. For instance, technological advancements have led to the development of high-quality spin columns and membranes. These materials are designed to efficiently capture nucleic acids while removing impurities, ensuring pure and intact DNA/RNA samples.

How can this report add value to an organization?

Workflow/Innovation Strategy: The DNA/RNA sample extraction and isolation market (by product) has been segmented into detailed segments of products, including different types of DNA and RNA kits, which are also bifurcated into the sample types of kits. Moreover, the study provides the reader with a detailed understanding of the different applications of these products.

Growth/Marketing Strategy: DNA/RNA sample extraction and isolation process is being used for extracting and isolating DNA/RNA from different sample types, which are further used for many downstream applications such as cloning, PCR, NGS, and microarray, among others. Various companies are providing products to aid in the process of isolating DNA/RNA.

Competitive Strategy: Key players in the global DNA/RNA sample extraction and isolation market have been analyzed and profiled in the study, including manufacturers involved in new product launches, acquisitions, expansions, and strategic collaborations. Moreover, a detailed competitive benchmarking of the players operating in the global DNA/RNA sample extraction and isolation market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2022. The

historical year analysis has been done from FY2020 to FY2021, and the market size has been calculated for FY2022 and projected for the period 2023-2033.

The geographical distribution of the market revenue is estimated to be the same as the company's net revenue distribution. All the numbers are adjusted off to two digits after decimal for report presentation reasons. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. CAGR is calculated from 2023 to 2033.

The market has been mapped based on different types of products available in the market and based on several indications. All the key manufacturing companies that have a significant number of offerings to the DNA/RNA sample extraction and isolation market have been considered and profiled in the report.

In the study, the primary respondent's verification has been considered to finalize the estimated market for the DNA/RNA sample extraction and isolation market.

The latest annual reports of each market player have been taken into consideration for market revenue calculation.

Market strategies and developments of key players have been considered for the calculation of sub-segment split.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year. The currency conversion rate has been taken from the historical exchange rate of the Oanda website or from the annual reports of the respective company, if stated.

Primary Research

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding of the numbers of the various markets for market type

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

National Center for Biotechnology Information (NCBI), PubMed, Science Direct, World Bank Group, Organisation for Economic Co-operation and Development (OECD), Centers for Disease Control and Prevention (CDC), Global Burden Disease (GBD), and World Health Organization (WHO)

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolio

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentations, split-ups, and percentage shares

Data for market value

Key industry trends of the top players in the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

Extraction and isolation of DNA and RNA samples is a pivotal process in molecular biology and genetics, involving the separation and purification of DNA and RNA molecules from biological specimens, such as cells, tissues, blood, and other biological materials. This process is fundamental for a wide range of applications in research, diagnostics, forensics, and biotechnology.

The choice of extraction and isolation methods may vary depending on the specific requirements of the experiment or application. Various commercial kits, instruments, and protocols are available to facilitate this process, each designed to optimize the yield, purity, and integrity of the extracted nucleic acids. The purified DNA and RNA samples obtained through this process serve as the foundation for numerous molecular biology studies, including genetic testing, gene expression analysis, genotyping, sequencing, and various applications in medicine, agriculture, and biotechnology.

Some of the prominent companies in this market include:

Abnova Corporation

Agilent Technologies, Inc.

Bio-Rad Laboratories, Inc.

F. Hoffmann-La Roche Ltd

Illumina, Inc.

MACHEREY-NAGEL GmbH & Co. KG

Merck KGaA

Norgen Biotek Corp.

Omega Bio-tek, Inc.

Promega Corporation

QIAGEN N.V.

Tecan Group

Thermo Fisher Scientific, Inc.

Zymo Research

Companies not included in the list above are comprehensively covered in various sections of the report wherever applicable.

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