

Global Cell-Based Assay Market - A Global and Regional Analysis: Focus on Product, Services, Application, End User, Technology, Regional Analysis, and Competitive Landscape - Analysis and Forecast, 2023-2032

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Abstracts

Global Cell-Based Assay Market Industry Overview

The global cell-based assay market is expected to reach \$38.23 billion in 2032 from \$17.20 billion in 2022, at a CAGR of 8.44% during the forecast period 2023-2032.

Market Lifecycle Stage

The global cell-based assay market is anticipated to witness growth during the forecast year 2023-2032, largely fuelled by the promise of a novel breakthrough in the cell-based assay market, which is no longer restricted to drug discovery. The foremost advantage of utilizing cell-based assays is apparent: unlike basic biochemical assays, they provide a more comprehensive representation of biological systems as they encompass not just an isolated receptor or enzyme but all the organelles of a cell functioning as a single entity.

Impact

The impact analysis for the factors that significantly affect the market, namely, drivers, restraints, and opportunities, has been evaluated on a short-term and long-term basis. The short-term assessment considers the period between 2022 and 2026, and the long-term assessment considers the period between 2027 and 2032. Key developments and strategies that have been undertaken by some of the key players in this market have

been accounted for evaluation of the impact analysis. Further, these key developments have been assessed to understand the future scope of integrating advancing technologies to enable superior outcomes.

Impact of COVID-19

The cell-based assay market has also been impacted by the pandemic. As per World Health Organization (WHO), COVID-19 has affected millions of people, resulting in a considerable number of deaths. In response, companies have intensified their research and development efforts to create vaccines and treatments for the SARS-CoV-2 virus. This research is considered critical and has remained unaffected, with operations and output continuing as before. As a result of the increase in research activities, the availability of research funding and demand for cell-based test products are expected to expand.

Companies in the industry are adapting their long-and short-term growth strategies to capitalize on opportunities in the research market by introducing innovative products to combat the pandemic. The need for COVID-19 research has created a broad scope for cell-based tests in viral infection research, vaccine development, and drug discovery.

Various COVID-19 vaccines and antiviral medications have been authorized or are under development, and patients are being treated symptomatically. The functional efficiency of the antibodies produced to neutralize the virus is assessed using cell-based assays for both vaccines and treatments. In order to reduce time and increase throughput, cell-based assays are utilized. As a result, the demand for cell-based assays to provide early indications of symptoms in patients has increased. Consequently, the overall impact of COVID-19 on the cell-based assay market is predicted to be positive.

Market Segmentation:

Global Cell-Based Assay Market

Segmentation 1: by Product

Consumables

Instruments and Software

Services

Based on product type, the global cell-based assay market is segmented into consumables, instruments and software, and services.

Segmentation 2: by Region

North America

Europe

Asia-Pacific

Rest-of-the-World

In 2022, the North America region dominated the global cell-based assay market, and it is expected to hold its dominance throughout the forecast period 2023-2032.

Segmentation 3: by Application

Drug Screening

Basic Research

Predictive Toxicology

Other Applications (Other Industries, Cell and Gene therapy, among others)

As of 2022, the cell-based assay market (by application) was dominated by drug screening applications, holding a 41.27% market share.

Segmentation 4: by Technology

Flow Cytometry

Automated Handling

High Throughput Screening

High Content Screening

Other Technologies (Label-Free Detection, Image Cytometry, among others)

As of 2022, the global cell-based assay market (by technology) was dominated by flow cytometry, holding a 34.11% market share.

Segmentation 5: by End User

Pharmaceutical and Biopharmaceutical Companies

Contract Research Organizations (CROs)

Academic and Research Institutes

Other End Users (Government Organizations)

As of 2022, the global cell-based assay market (by end user) was dominated by the pharmaceutical and biopharmaceutical companies' segment, holding a 51.36% market share.

Segmentation 6: by Company

Becton, Dickinson and Company

Bio-Rad Laboratories, Inc.

Danaher Corporation

Merck KGaA

Thermo Fisher Scientific, Inc.

Corning Incorporated

Lonza Group AG

Agilent Technologies, Inc.

Promega Corporation

PerkinElmer, Inc.

Eurofins DiscoverX Products

Cell Signaling Technology, Inc.

Charles River Laboratories International, Inc.

Laboratory Corporation of America Holdings

Based on company, the global cell-based assay market is dominated by Thermo Fisher Scientific Inc., Danaher Corporation, Becton, Dickinson and Company, among others.

Recent Developments in the Global Cell-Based Assay Market

In April 2022, Lonza Group AG announced an enhancement to its automated cell therapy manufacturing system called the Cocoon Platform. The latest addition, known as magnetic selection, broadens the platform's capabilities by enabling cell binding, separation, and bead removal (if needed), all conducted through the Cocoon cassette.

In April 2020, Bio-Rad Laboratories, Inc. completed the acquisition of Celsee, Inc., a company that provides instruments and consumables that enable the isolation, detection, and analysis of individual cells.

In July 2021, PerkinElmer, Inc. announced that it had reached a definitive agreement to acquire BioLegend, a manufacturer of high-quality antibodies and reagents used in biomedical research, for \$5.25 billion.

In April 2021, Lonza Group AG and Junshi Biosciences announced an expansion of their collaboration aimed at developing and manufacturing

biologics. Lonza Group AG would utilize its worldwide network and local operational expertise to help Junshi Biosciences speed up the development of drugs in its pipeline and increase their adoption in the global market. According to the agreement, Lonza Group AG would provide comprehensive assistance, including cell line creation and development, the supply of cell culture media and reagents, process development, and GMP manufacturing.

In July 2021, Lonza Group AG and CN Bio established a distribution agreement that involves Lonza Group AG providing hepatic cells to CN Bio for prequalification, which would be utilized in their PhysioMimix single-and multi-organ MPS technology. This collaboration aims to revolutionize the generation of preclinical data that is relevant to humans. By using prequalified cells, customers can avoid the need to experiment with multiple cell types, thereby saving time and ensuring the discovery of cells that will grow and function effectively in 3D culture.

Demand - Drivers and Limitations

The following are the demand drivers for the global cell-based assay market:

Increase in Demand for Cell-Based Assay in Drug Discovery and Development

Rise in Life Sciences Research Investments

Technological Advancements

The market is expected to face some limitations due to the following challenges:

High Cost

Lack of Standardization

How can this report add value to an organization?

Workflow/Innovation Strategy: The global cell-based assay market is segmented (by product) into three categories, i.e., consumables, instruments and software, and

services. The consumables segment is further classified as reagents, assay kits, microplates, cell lines, probes and labels, and other consumables.

Reagents accounted for 29.43% of the share in the global cell-based assay market from 2022 to 2032.

Growth/Marketing Strategy: The global cell-based assay market is anticipated to witness growth during the forecast year 2023-2032. The advent of CRISPR/Cas9 technology has completely transformed gene studies and their functions by offering highly precise and user-friendly genome editing capabilities. CRISPR significantly streamlines the development of more intricate disease-related cell-based assays, enabling researchers to tackle complex questions and study heterogeneous diseases with more relevant and sophisticated assays.

Competitive Strategy: Key players in the global cell-based assay market have been analyzed and profiled in the study, including manufacturers involved in new product development, acquisitions, expansions, and strategic collaborations. Moreover, a detailed competitive benchmarking of the players operating in the global cell-based assay 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.

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