

Global Cell Counting Market: Analysis By Product (Consumables & Accessories and Instrument), By Application (Life Science Research, Cell Based Therapy, Bioprocessing, and Others), By End-User (Research and Academic Institutes, Hospitals & Diagnostic Laboratories, Pharmaceutical and Biotechnology Companies, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global cell counting market was valued at US\$9.98 billion in 2023. The market value is expected to reach US\$15.72 billion by 2029. Cell counting is the process of determining the number of cells in a sample. It plays a crucial part in the clinical workflow in cell-based assays, spanning bioprocessing, cell and gene therapy (CGT), life science research to food/agriculture quality control.

The global cell counting market is witnessing significant growth due to various factors. Advancements in cell biology, biotechnology, and medical research are driving demand for precise cell counting, especially with the rise of personalized medicine and regenerative therapies. The expansion of biopharmaceutical and biotechnology sectors further fuels market growth. Future growth is anticipated due to technological advancements, including automation, artificial intelligence, and miniaturization, facilitating high-throughput analysis and integration with laboratory systems. Moreover, the focus on point-of-care diagnostics and decentralized testing, along with increasing healthcare investments and the prevalence of chronic diseases, will continue to propel market expansion. The market is expected to grow at a CAGR of approx. 8% during the

forecasted period of 2024-2029.

Market Segmentation Analysis:

By Product: The report provides the bifurcation of the market into two segments based on the product: Consumables & Accessories, and Instrument. The consumables & accessories held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. Consumables and accessories play a crucial role in the cell counting process, supporting sample preparation, analysis, and data interpretation. As the volume of cell-based research and bioprocessing activities continues to increase, there is a corresponding rise in the demand for consumables such as cell counting chambers, slides, reagents, and disposable cuvettes.

By Application: The report further provides the segmentation based on the following applications: Life Science Research, Bioprocessing, Cell Based Therapy, and Others. Life science research segment held the highest share in the market, whereas the cell based therapy segment is expected to be the fastest-growing segment in the forecasted period. The demand for cell counting applications in cell-based therapy is increasing due to the rapid advancement and commercialization of cell-based treatments for various diseases and medical conditions. Cell counting is essential throughout the cell therapy development and manufacturing process, from initial research and development to clinical trials and commercialization. With the increasing focus on personalized medicine and regenerative therapies, there is a growing demand for accurate and reliable cell counting technologies to support the development and manufacturing of cell-based therapies tailored to individual patients.

By End-User: The report provides an analysis of the market based on end-users: Research & Academic Institutes, Hospitals & Diagnostic Laboratories, Pharmaceutical & Biotechnology Companies, and Others. Research & academic institutes held the highest share in the market, whereas hospitals & diagnostic laboratories segment is expected to be the fastest growing segment in the forecasted period. The increasing emphasis on interdisciplinary research and collaborative initiatives has led to the integration of cell counting technologies into multidisciplinary research projects and academic consortia. As a result, research and academic institutes continue to invest in advanced cell counting instruments, consumables, and software tools to support their research endeavors, foster innovation, and train the next generation of scientists.

By Region: The report provides insight into the cell counting market based on the regions namely North America, Europe, Asia Pacific, Latin America, and Middle East &

Africa. North America held the major share in the market. In recent years, the cell and gene therapy market has grown significantly in the US. The increase in cell and gene therapy launches in the US creates a higher demand for accurate cell counting technologies throughout the therapy development process, from research and development to manufacturing and quality control. On the other hand, according to the National Cancer Institute, in 2020, an estimated 603,989 people were living with lung and bronchus cancer in the US. Therefore, the rise in solid tumor cases prompts an increase in active clinical trials for developing new treatments and therapies. These trials require extensive cell counting for patient monitoring, efficacy assessment, and safety evaluation, driving demand for cell counting technologies and contributing to market growth.

Germany has a robust healthcare system and a growing emphasis on personalized medicine, leading to increased investment in cell-based therapies for treating various diseases and medical conditions. The country's supportive regulatory environment, coupled with government funding initiatives and collaborations between academia and industry, accelerates the adoption of cell counting technologies.

In October 2023, India's counterpart to the US Food and Drug Administration, the Central Drugs Standard Control Organization, made NexCAR19 India's first approved CAR-T cell therapy. The approval of new cell therapies drives demand for cell counting technologies used in therapy development, manufacturing, and patient monitoring. This increased adoption of cell counting solutions contributes to Indian market growth.

Market Dynamics:

Growth Drivers: The global cell counting market has been growing over the past few years, due to factors such as an increasing number of active cell and gene therapy trials, rising spending on pharmaceutical R&D, funding in the biopharma sector, developments in advanced cell-based research, government initiatives for promoting cell therapeutics research, and many other factors. CGT is a relatively new type of niche that has the potential to treat many diseases for which there is currently no effective alternative. While decades of research have gone into CGT, developing this innovative treatment gathered momentum after the FDA approved the first CAR-T therapy in 2017 (Novartis's Kymriah for acute lymphoblastic leukemia). The increasing number of active cell and gene therapy trials has driven the demand for advanced cell counting technologies and solutions. Cell and gene therapies require precise characterization and quantification of therapeutic cells, vectors, and target cells, both during manufacturing processes and in preclinical and clinical studies. As the field of

regenerative medicine expands and more therapies move towards commercialization, there is a growing need for accurate and reliable cell counting instruments, flow cytometry systems, and image-based analysis platforms.

Challenges: However, the market growth would be negatively impacted by various challenges such as high cost of cell analysis, sample heterogeneity, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing number of new clinical trials, rising demand for personalized medicine, advancements in cell counting technologies, shift towards portable and point-of-care cell counting devices, integration of AI and ML, increasing adoption of automation, etc. Cell counting instrument sales growth is tightly connected to the number of CGT approvals. At the end of May 2023, Krystal Biotech's Vyjuvek – a gene therapy for the treatment of dystrophic epidermolysis bullosa (DEB) – received FDA approval. On the other hand, at the end of June 2023, Sarepta Therapeutics received FDA approval for its Duchenne muscular dystrophy (DMD) treatment. The FDA has missed most of its PDUFA target dates in the CGT area during 2023. However, the Center for Biologics Evaluation and Research (CBER), the arm of the FDA that evaluates CGT therapies, has been authorized to hire another 125 reviewers under PDUFA VII. Such an expansion could help the administration meet its target deadlines, going forward. PDUFA dates for therapies could translate into an order book boost for the cell counting players in the market, resulting in market growth.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic created opportunities for the cell counting market. With the urgent need for diagnostic testing and vaccine development, there was a surge in demand for cell counting instruments and reagents used in virology research. Furthermore, the pandemic underscored the critical role of cell counting in various aspects of infectious disease management, from basic research on viral replication mechanisms to clinical applications such as immune cell profiling and vaccine development. This increased recognition is likely to drive sustained demand for cell counting instruments and reagents in the coming years, as stakeholders prioritize preparedness for future outbreaks and invest in strengthening healthcare infrastructure.

Competitive Landscape:

The global cell counting market is consolidated, with top five players holding approximately 70% share of the market. The key players in the global cell counting

market are:

ChemoMetec
Thermo Fisher Scientific Inc.
Merck KGaA (MilliporeSigma)
Agilent Technologies, Inc.
Revvity Inc. (Nexcelom Bioscience LLC.)
Bio-Rad Laboratories, Inc.
Becton, Dickinson and Company
Danaher Corporation (Beckman Coulter Inc.)
Olympus Corporation
Sysmex Corporation
Aligned Genetics, Inc. (Logos Biosystems)
DeNovix Inc.

Some of the strategies among key players in the market are product launches, mergers, acquisitions, and collaborations. For instance, BD Biosciences, a subsidiary of Becton Dickinson, released the Accuri C6, in 2018. This is one of the company's simpler and more compact cytometers. Backed by 23,000 citations to date, the instrument is widely used in most types of bioprocessing workflows, such as cell and cancer biology, plant and microbiology, and industrial applications. On the other hand, Beckman Coulter offers two versions of its Vi-CELL cell counter: the Vi-CELL BLU and Vi-CELL XR (the BLU is a more advanced version of the older XR, able to process more samples faster (and able to work with smaller sample volumes)). Both support a 24-sample carousel or a 96 well plate, making them ideal for bioprocessing applications.

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