

Europe Real Time Polymerase Chain Reaction (qPCR) Market Analysis By Instrument (7500, Quantstudio Dx, ViiA 7 Dx, StepOne/StepOne Plus, LightCycler 2.0, Cobas 4800, LightCycler 480, CFX96, SmartCycler, Rotor-Gene Q, MasterCycler), And Segment Forecasts to 2022

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Abstracts

Europe Real Time Polymerase Chain Reaction (qPCR) market is expected to reach over USD 395.8 million by 2022, according to a new report by Grand View Research Inc. Technological advancements on the grounds of accuracy, portability, and cost-effectiveness are expected to serve this market as high-impact rendering drivers over the forecast period. For instance, Applied Biosystems has QuantStudio Dx series for rapid and affordable diagnosis of molecular abnormalities at early stage of diseases development.

Increasing amount of R&D expenditure by the major players and development of novel assay kits are expected to provide potential growth platform for adoption of qPCR instruments for diagnostic use.

Growing prevalence of cancer and other chronic diseases is anticipated to be the key driver for the industry growth. Moreover, growing geriatric population base in EU-28 countries is expected to increase age-related conditions such as diabetes and cardiovascular disorders.

Furthermore, major pharmaceutical companies are entering into collaborations with diagnostic instrument development companies through mergers and acquisitions or co-product development activities. For instance, in 2011, Life Technologies signed an

agreement with GSK Biologicals to develop a companion diagnostic test. Life Technology will develop a qPCR based diagnostic assay for GSK's MEGA-A3 cancer immunotherapy.

Emerging opportunities for both companies for development of products pertaining to early detection of diseases such as cancer and infectious diseases are estimated to enhance such collaborative activities over the forecast period.

Further key findings from the study suggest:

Thermo Fisher/ABI dominated the market with a revenue share of over 38% in 2014 owing to high installed base of instruments such as StepOne, 7500, ViiA 7, and QuantStudio from ABI

Bio-Rad qPCR instruments market is the second largest in terms of revenue share over USD 7.0 million in 2014. Presence of licensing agreement with companies such as Mobidiag in Europe for the distribution Bio-Rad qPCR instruments, availability of user-friendly software and good technical support are some factors attributing for its high market coverage.

Thermo Fischer Scientific, Roche, Bio-Rad, and Qiagen accounted for over 84% of market share in 2014. Product development and distribution agreements are the key strategies adopted by the company for its growth. Whereas, the four countries namely UK, Germany, Spain and France covered around 56% of the total European market for qPCR used as IVD platform in 2014.

Germany dominated the European market with revenue of around USD 9.5 million in 2014. It is estimated to be one of the major countries for use of In-Vitro Diagnostics (IVD) platform in Europe.

The UK is expected to witness significant growth with a CAGR of around 13% over the forecast period owing to rising prevalence of target diseases and introduction of new automated technologies.

Countries such as France and Spain are experiencing economic growth over the past few years; these countries are expected to offer immense potential for Europe real time PCR industry mainly due to growing economy and high unmet needs

Market participants are constantly engaged in the introduction of technological

advancements. The real time PCR instruments market involves extensive technological advancements to match user requirements.

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