

# Polymerase Chain Reaction (PCR) – A Global Market Overview

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## Abstracts

### REPORT SYNOPSIS

Polymerase chain reaction (PCR) is a technology that has opened up new vistas for advances in life sciences research and molecular diagnostics due to its attributes, such as detection and quantification of DNA and RNA genetic materials. North America leads the global market for PCR, estimated at US\$3.5 billion (40.3% share) in 2017, which is expected to maintain a 2017–2022 CAGR of 7.5% in reaching a projected US\$5 billion by 2022.

Asia–Pacific is expected to witness the fastest similar period robust CAGR of 9.2% and reach US\$2.5 billion by 2022. Global demand for PCR in Clinical Diagnostics Labs & Hospitals, among end use sectors, is slated to record the fastest CAGR of 8.6% during the aforementioned analysis period.

### RESEARCH FINDINGS & COVERAGE

Global PCR market is examined in this report with respect to latest prominent technologies, major application areas and key end-use sectors

The report exclusively analyzes each application area, technology and end-use sector of PCR by a major geographic region

Droplet Digital PCR Surpasses Real-Time PCR in Detecting Environmental DNA

PCR Testing for Veterinary Diseases Gaining Momentum

## Capillary Loop Convective Polymerase Chain Reaction Platform with Real-Time Fluorescence Detection Improves Amplification Efficiency

Key business trends focusing on product innovations/developments, M&As, JVs and other recent industry developments

Major companies profiled – 33

The industry guide includes the contact details for 161 companies

### **PRODUCT OUTLINE**

The report analyzes the market for the key product segments of PCR including:

Instruments

Reagents & Consumables

Software & Services

Application Areas of PCR analyzed comprise the following:

Clinical Diagnostics

Life Sciences

Others

End-Use Sectors of PCR analyzed comprise the following:

Academic & Research Institutes

Clinical Diagnostics Labs & Hospitals

Pharmaceutical & Biotechnology

Others

### Analysis Period, Units and Growth Rates

The report reviews, analyzes and projects the global PCR market for the period 2014-2022 in terms of market value in US\$ and the compound annual growth rates (CAGRs) projected from 2017 through 2022

### Geographic Coverage

North America (The United States, Canada and Mexico)

Europe (France, Germany, Italy, The United Kingdom, and Rest of Europe)

Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)

Rest of World

## Contents

### **PART A: GLOBAL MARKET PERSPECTIVE**

#### **1. INTRODUCTION**

##### 1.1 Product Outline

###### 1.1.1 What is Polymerase Chain Reaction (PCR)?

###### 1.1.1.1 Procedure of PCR

###### 1.1.1.1.1 Initialization

###### 1.1.1.1.2 Denaturation

###### 1.1.1.1.3 Annealing

###### 1.1.1.1.4 Extension/Elongation

###### 1.1.1.1.5 Final Elongation

###### 1.1.1.1.6 Final Hold

###### 1.1.1.2 The Exponential Cycle of PCR

###### 1.1.1.3 Design of Primers

###### 1.1.1.4 Components Required for PCR

###### 1.1.1.4.1 Buffer Components

###### 1.1.1.4.2 Additives and Inhibitors

###### 1.1.1.4.3 Thermal Cycler and Thermal Cycling Conditions

###### 1.1.1.5 Scrutiny of Fragment Identity

###### 1.1.2 PCR Techniques

###### 1.1.2.1 Digital PCR (dPCR)

###### 1.1.2.1.1 Principles of Digital PCR

###### 1.1.2.2 Real-Time PCR

###### 1.1.2.2.1 Principle of Real-Time PCR

###### 1.1.2.2.2 Fluorescent Dyes, Primers, and Probes Used in Real-Time PCR

###### 1.1.2.2.3 Applications of Real-Time PCR

###### 1.1.2.3 Other PCR Techniques

###### 1.1.2.3.1 Allele-Specific PCR

###### 1.1.2.3.2 Assembly PCR or Polymerase Cycling Assembly (PCA)

###### 1.1.2.3.3 Asymmetric PCR

###### 1.1.2.3.4 Helicase-Dependent Amplification

###### 1.1.2.3.5 Hot Start PCR

###### 1.1.2.3.6 Intersequence-Specific PCR (ISSR)

###### 1.1.2.3.7 Inverse PCR

###### 1.1.2.3.8 Ligation-Mediated PCR

###### 1.1.2.3.9 Methylation-Specific PCR (MSP)

- 1.1.2.3.10 Miniprimer PCR
- 1.1.2.3.11 Multiplex Ligation-Dependent Probe Amplification (MLPA)
- 1.1.2.3.12 Multiplex PCR
- 1.1.2.3.13 Nested PCR
- 1.1.2.3.14 Overlap-Extension PCR or Splicing by Overlap Extension (SOE)
- 1.1.2.3.15 Reverse Transcription PCR (RT-PCR)
- 1.1.2.3.16 Solid Phase PCR
- 1.1.2.3.17 Thermal Asymmetric Interlaced PCR (TAIL-PCR)
- 1.1.2.3.18 Touchdown PCR (Step-Down PCR)
- 1.1.3 Applications of PCR
  - 1.1.3.1 Virology
  - 1.1.3.2 Mycology and Parasitology
  - 1.1.3.3 Microbiology
    - 1.1.3.3.1 Bacteriology
  - 1.1.3.4 Dentistry
  - 1.1.3.5 Agricultural Biotechnology
  - 1.1.3.6 Other Select Applications

## **2. KEY MARKET TRENDS**

- 2.1 Expediting the PCR Process Now Possible
- 2.2 Emergence of Ultrafast Real Time Q-Plasmonic PCR
- 2.3 Contemporary Research Using BNA-Based Digital PCR
  - 2.3.1 Bridged Nucleic Acids (BNA) Technology
- 2.4 Detection of Early-Stage Liver Cancer Improves by Using CTC-iChip with Digital PCR Assay
- 2.5 Propidium Monoazide-PCR Assay Developed for Detecting viable *Lactobacillus brevis* in Beer
- 2.6 PCR Testing for Veterinary Diseases Gaining Momentum
- 2.7 RT-qPCR Improves Detection of *Mycobacterium tuberculosis*
- 2.8 Capillary Loop Convective Polymerase Chain Reaction Platform with Real-Time Fluorescence Detection Improves Amplification Efficiency
- 2.9 Droplet Digital PCR Surpasses Real-Time PCR in Detecting Environmental DNA
- 2.10 Nanoparticle-Assisted PCR Overcomes Technical Challenges
- 2.11 Litmus Test Used for Detecting DNA Amplicons of PCR
- 2.12 dPCR Used for Characterizing DNA Reference Materials
- 2.13 Innovative PCR Technique Improves Sequencing of Minute cfDNA

## **3. KEY GLOBAL PLAYERS**

Abbott Laboratories (United States)  
Agilent Technologies, Inc. (United States)  
Becton, Dickinson and Company (United States)  
Biocartis NV (Belgium)  
Bio-Rad Laboratories, Inc. (United States)  
Danaher Corporation (United States)  
Eppendorf AG (Germany)  
F. Hoffmann-La Roche Ltd (Switzerland)  
Fluidigm Corporation (United States)  
GE Healthcare Life Sciences (United Kingdom)  
Merck KGaA (Germany)  
Ocimum Biosolutions Ltd. (India)  
Qiagen N.V. (The Netherlands)  
Thermo Fisher Scientific, Inc. (United States)

#### **4. KEY BUSINESS TRENDS**

Thermo Fisher's DNA Detection Kit Receives FBI approvals to Identify male-specific Y chromosome markers  
Genomic Health and Biocartis Enter into Agreement to Develop Oncotype DX Breast Recurrence Score Test  
Bio-Rad Unveils RT-PCR Assay Kit for Simultaneous Detection of Zika, Dengue, and Chikungunya Viruses  
Angle Plc Enters into Marketing Partnership with QIAGEN  
QIAGEN and Clinical Genomics Join Forces to work on Colorectal Cancer  
FDA Approval for Thermo Fisher's TaqPath Zika Virus Kit  
Bioline Expands JetSeq portfolio  
Thermo Fisher Completes CE-IVD Registration of its QuantStudio 5 Dx System for In Vitro Diagnostic Use in Europe  
Fluidigm and Ascendas Genomics Partner to Develop Microfluidic Molecular Diagnostics in China  
Agilent Technologies Launches AriaDx Real-Time PCR System in Europe  
Fluidigm Unveils Advanta Immuno-Oncology Gene Expression PCR Assay  
Formulatrix, Inc Introduces CONSTELLATION Digital PCR System  
Roche Introduces Cobas MRSA/SA Nucleic Acid Test  
Bio-Rad Launches First Droplet Digital PCR-Based Assays  
Bio-Rad Unveils CFX Maestro Software for PCR Data Analysis  
FDA Approval for QIAGEN's Artus CMV QS-RGQ MDx Kit for CMV Testing

Roche Receives FDA Approval for CMV Viral Load Testing on Cobas 6800/8800 Systems

FDA 510(K) Clearance for BDC's Molecular Test for Harmful Intestinal Bacteria Causing Infectious Diarrhea

Sysmex to Acquire Oxford Gene Technology

Seegene Enters the U.S. Diagnostic Market in Collaboration with Thermo Fisher

Seegene Develops Second-Generation real-time PCR technology Universal SG Fluorescence-labeled oligo

Bruker to Release new Clinical Microbiology kits and Assays at ECCMID

Roche Introduces Cobas Liat PCR System with New Assays

QIAGEN to Release AR-V7 Test in Prostate Cancer for Research Use Only

QIAGEN and CACER-ID Consortium Collaborate on Liquid Biopsies Workflows

QIAGEN Introduces First FDA-Cleared JAK2 Test for Leukemia Disease

Roche Launches Cobas HPV on the Cobas 6800/8800 Systems for Cervical Cancer

Bioline Unveils New JetSeq DNA Quantification Kits

Thermo Fisher Launches QuantStudio 5 Real-Time PCR System for Forensic Laboratory Use

Digital PCR Upholds High Reproducibility International Multicenter Study

Promega and Hitachi Technologies Team-Up for Capillary Electrophoresis (CE) Instrument

U.S. FDA Grants Abbott the First Commercial Authorization for a Molecular Test to Detect Zika Virus Using Whole Blood

Global Liquid Biopsy Researchers Participate in Precision Medicine World Conference on NGS & PCR Technologies

Bio-Rad to Acquire RainDance Technologies

Bioline Unveils EPIK miRNA Assays

Bruker Acquires InVivo Biotech

QIAGEN Introduces CALR Mutation Assay for MPN Diagnosis

Roche and Merck KGaA Enter into Distribution Agreement

Biocartis and Thermo Fisher Announce Agreement

RainDance Technologies Unveils RainDrop Plus Digital PCR System

Promega Corporation Launches Promega PCR Optimization Kit

Bruker Acquires Nucleic Acid Testing (NAT) Assays and Syndromic Panel Technology

BD MAX Vaginal and CT/GC/TV Panels receives FDA approval

Biocartis receives ? 1.4 M grant from VLAIO

LabCorp launches cobras 8800 system from Roche

RainDance Technologies Showcases its Picodroplet Platform at ASHG 2016

Droplet Digital Technology Presented at ASHG 2016

Thermo Fisher scientific Launches NGM Detect Kit

Bioline accredited to the ISO 13485 Quality Standard

Bioline Expands the SensiFAST family of real-time PCR products

Thermo Fisher Scientific Partners with Hamilton Bonaduz AG

Maxwell RSC PureFood GMO and Authentication Kit from Promega

Bio-Rad Introduces an Assay website to identify or design Droplet Digital PCR Assays

Roche receives FDA, CLIA waiver for cobas Influenza A/B & RSV test

Renewal of Thermo Fisher Scientific and DuPont Nutrition & Health's Deal to Supply BAX System Q7 Platform

Release of Bio-Rad's New ddPCR CHO and ddPCR E. coli Residual DNA Quantification Kits

Bio-Rad's Droplet Digital PCR-Based Assay for Rapid and Cost-Effective Quantification of Genome-Editing Events

BD Collaborated with Check-Points to Develop and Supply BD MAX Assays for CRO Detection

Seegene to Launch Universal SG Fluorescence Oligo System

Release of Bioline's New MyTaq Plant-PCR Kit

US FDA Granted Emergency Use Authorization for Idylla Ebola Virus Triage Test

First Prospective Clinical Trial of Liquid Biopsy Using ddPCR Validated the Use of cfDNA as a Predictive Diagnostic Tool

Thermo Scientific SureTect Real-Time PCR Assays for Precise Detection of Molecular Pathogens

Five New ddPCR Multiplex Mutation Screening Kits Launched by Bio-Rad

New Thermo Scientific SureTect Cronobacter Species Real-Time PCR Assay to Aid Infant Formula Producers

US FDA Approved cobas Zika test to Screen Blood Samples on the cobas 6800/8800 Systems

COBAS AmpliPrep/COBAS TaqMan HCV Test, v2.0, the First Quantitative HCV RNA Test to Receive FDA Approval for Use as an Aid to Diagnose an Active HCV Infection

New Three-Color Crystal Digital PCR System Launched by Stilla Technologies

Unveiling of Bioline's EPIK miRNA Select Kits

CE IVD Marking for Bio-Rad's QX200 Droplet Digital PCR System

Thermo Scientific SureTect Escherichia coli O157:H7 PCR Assay Granted NF Validation Certificate by AFNOR Certification

GE Healthcare to Set Up Headquarters in Chicago

Milestone Reached by Qiagen with its Portfolio of Master Collaboration Agreements with Major Pharmaceutical Companies to Develop Companion Diagnostics

Biocartis Joined Forces with Merck to Develop and Commercialize a New Liquid Biopsy RAS Biomarker Test for mCRC Patients

US FDA Approved Roche's cobas HIV-1 Viral Load Test for Use on the cobas



## 6800/8800 Systems

JetSeq DNA Library Preparation Kit, the First Product in a New Line of Kits from Bionline for NGS Sample Preparation

Roche Finalized the Acquisition of Kapa Biosystems

RainDance to Develop Ultra-Sensitive, Highly Precise and Low Cost NGS and Digital PCR Methods in Collaboration with BSRI

Sigma-Aldrich Acquired by Merck

Addition of HIV-1, HCV and HCV GT Assays Broaden Roche's Available Menu on the cobas 4800 System

Roche's cobas HBV and cobas HCV viral load tests, the first assays with US FDA Approval for use on the cobas 6800 and cobas 8800 Systems

RIVM Selected Roche to Implement the cobas HPV Test as the First-Line, Primary Screening Test in the National Cervical Cancer Screening Program

Release of Bio-Rad's One-Step RT-ddPCR Advanced Kit for Probes

Launch of Roche's First Oncology Assay Using Either Plasma or Tumour Tissue Samples

FDA CLIA Waiver Granted for Roche's cobas Influenza A/B Test for Use on the cobas Liat System

Seegene Joined Forces with BD for the Development of Multiplex Real-Time PCR Reagents for the BD MAX System

Release of Bionline's New EPIK miRNA Panel Assays

MHTP's Medical Genomics Facility to House Australia's First Single-Cell Genomics Centre of Excellence

FDA Approved Qiagen's therascreen EGFR Test as a Companion Diagnostic for Guiding the Use of AstraZeneca's IRESSA in Treating NSCLC Patients

MDRO Tests Developed by Fluidigm in Collaboration with OpGen

Seegene to Develop Multiplex assay panels menu for Qiagen's QIA Symphony RGA MDx Automation Platform

Hitachi High-Technologies Collaborated with Qiagen to Develop New Automation Systems Based on PCR and NGS Technologies

CE Marking Obtained by Beckman Coulter's DxN VERIS HCV Assay and DxN VERIS HIV-1 Assay

510(k) Clearance Received by Roche's cobas Cdiff Test

510(k) Clearance Received by Roche's cobas HSV 1 and 2 Test

Biocartis Collaborated with Fast-track Diagnostics to Develop a Range of Multiplex Infectious Disease Tests on its Idylla System

Seegene's Allplex Gastrointestinal Full Panel Assay Received CE-IVD Mark

US FDA Granted CLIA Waiver for Roche's cobas Strep A Test for Use on the cobas Liat System

Roche's cobas KRAS Mutation Test Received FDA Approval for Diagnostic Use  
DxN VERIS Molecular Diagnostics System Presented by Beckman Coulter at ECCMID  
in Denmark

RainDance Form Distribution Pacts to Meet the Increasing Demand for Liquid Biopsy  
Applications outside the US

An Integrated Multiplex Real-time PCR Assay for Bloodstream Infections Developed by  
Biocartis in Collaboration with Microbiome

BD MAX CT/GC/TV and CT/GC Assays Received CE Mark

Promega releases the PowerQuant System

Commercial availability of Roche's cobas DPX test for parvovirus B19 (B19V) and  
hepatitis A virus (HAV)

Roche launches cobas HBV assay and receives CE mark

Bio-Rad launches new PrimePCR Droplet Digital PCR (ddPCR) Assays

Bio-Rad Laboratories launches PrimePCR Assays for Real-Time PCR

SciLifeLab sets up Swedish national center for single-cell biology

Roche MRSA/SA Test receives FDA clearance

Qiagen secures additional EGFR pathway-related intellectual property licenses from  
Roche

Life Science Industry awards for Bio-Rad Protein Expression Products, Genomic  
Workflow Solutions

Bio-Rad launches ddPCR KRAS Screening Multiplex Kit

cobas TaqScreen MPX Test, v2.0 Receives FDA Approval

## **5. GLOBAL MARKET OVERVIEW**

### 5.1 Global Polymerase Chain Reaction Market Overview by Product Segment

#### 5.1.1 Polymerase Chain Reaction Product Segment Market Overview by Global Region

##### 5.1.1.1 Instruments

##### 5.1.1.2 Reagents & Consumables

##### 5.1.1.3 Software & Services

### 5.2 Global Polymerase Chain Reaction Market Overview by Application Area

#### 5.2.1 Polymerase Chain Reaction Application Area Market Overview by Global Region

##### 5.2.1.1 Clinical Diagnostics

##### 5.2.1.2 Life Sciences

##### 5.2.1.3 Other Applications

### 5.3 Global Polymerase Chain Reaction Market Overview by End-Use Sector

#### 5.3.1 Polymerase Chain Reaction End-Use Sector Market Overview by Global Region

##### 5.3.1.1 Academic & Research Institutes

- 5.3.1.2 Clinical Diagnostics Labs & Hospitals
- 5.3.1.3 Pharmaceutical & Biotechnology Sectors
- 5.3.1.4 Other End-Use Sectors

## **PART B: REGIONAL MARKET PERSPECTIVE**

### **REGIONAL MARKET OVERVIEW**

#### **1. NORTH AMERICA**

- 1.1 North American Polymerase Chain Reaction Market Overview by Geographic Region
- 1.2 North American Polymerase Chain Reaction Market Overview by Product Segment
  - 1.2.1 Polymerase Chain Reaction Product Segment Market Overview by NA Region
    - 1.2.1.1 Instruments
    - 1.2.1.2 Reagents & Consumables
    - 1.2.1.3 Software & Services
- 1.3 North American Polymerase Chain Reaction Market Overview by Application Area
  - 1.3.1 Polymerase Chain Reaction Application Area Market Overview by NA Region
    - 1.3.1.1 Clinical Diagnostics
    - 1.3.1.2 Life Sciences
    - 1.3.1.3 Other Applications
- 1.4 North American Polymerase Chain Reaction Market Overview by End-Use Sector
  - 1.4.1 Polymerase Chain Reaction End-Use Sector Market Overview by NA Region
    - 1.4.1.1 Academic & Research Institutes
    - 1.4.1.2 Clinical Diagnostics Labs & Hospitals
    - 1.4.1.3 Pharmaceutical & Biotechnology Sectors
    - 1.4.1.4 Other End-Use Sectors
- 1.5 Major Market Players
  - Abbott Laboratories (United States)
  - Abbott Molecular Inc. (United States)
  - Agilent Technologies, Inc. (United States)
  - Becton, Dickinson And Company (United States)
  - BD Biosciences, Systems and Reagents Inc. (United States)
  - Bio-Rad Laboratories, Inc. (United States)
  - Raindance Technologies, Inc. (United States)
  - Bruker Corporation (United States)
  - Complete Genomics, Inc. (United States)
  - Danaher Corporation (United States)

Beckman Coulter, Inc. (United States)  
Fluidigm Corporation (United States)  
Formulatrix, Inc. (United States)  
Illumina Inc. (United States)  
Epicentre (United States)  
Promega Corporation (United States)  
Roche Diagnostics Corporation (United States)  
Sigma-Aldrich (United States)  
Thermo Fisher Scientific, Inc. (United States)

## 1.6 Country-wise Analysis of North American Polymerase Chain Reaction Market

### 1.6.1 The United States

1.6.1.1 United States Polymerase Chain Reaction Market Overview by Product Segment

1.6.1.2 United States Polymerase Chain Reaction Market Overview by Application Area

1.6.1.3 United States Polymerase Chain Reaction Market Overview by End-Use Sector

### 1.6.2 Canada

1.6.2.1 Canadian Polymerase Chain Reaction Market Overview by Product Segment

1.6.2.2 Canadian Polymerase Chain Reaction Market Overview by Application Area

1.6.2.3 Canadian Polymerase Chain Reaction Market Overview by End-Use Sector

### 1.6.3 Mexico

1.6.3.1 Mexican Polymerase Chain Reaction Market Overview by Product Segment

1.6.3.2 Mexican Polymerase Chain Reaction Market Overview by Application Area

1.6.3.3 Mexican Polymerase Chain Reaction Market Overview by End-Use Sector

## 2. EUROPE

2.1 European Polymerase Chain Reaction Market Overview by Geographic Region

2.2 European Polymerase Chain Reaction Market Overview by Product Segment

2.2.1 Polymerase Chain Reaction Product Segment Market Overview by European Region

2.2.1.1 Instruments

2.2.1.2 Reagents & Consumables

2.2.1.3 Software & Services

2.3 European Polymerase Chain Reaction Market Overview by Application Area

2.3.1 Polymerase Chain Reaction Application Area Market Overview by European Region

2.3.1.1 Clinical Diagnostics

2.3.1.2 Life Sciences

2.3.1.3 Other Applications

2.4 European Polymerase Chain Reaction Market Overview by End-Use Sector

2.4.1 Polymerase Chain Reaction End-Use Sector Market Overview by European Region

2.4.1.1 Academic & Research Institutes

2.4.1.2 Clinical Diagnostics Labs & Hospitals

2.4.1.3 Pharmaceutical & Biotechnology Sectors

2.4.1.4 Other End-Use Sectors

2.5 Major Market Players

Biocartis NV (Belgium)

Bioline Reagents Limited (United Kingdom)

Dnavision SA (Belgium)

Eppendorf AG (Germany)

Exiqon A/S (Denmark)

F. Hoffmann-La Roche Ltd (Switzerland)

GE Healthcare Life Sciences (United Kingdom)

Merck KGaA (Germany)

Qiagen N.V. (The Netherlands)

Stilla Technologies (France)

2.6 Country-wise Analysis of European Polymerase Chain Reaction Market

2.6.1 France

2.6.1.1 French Polymerase Chain Reaction Market Overview by Product Segment

2.6.1.2 French Polymerase Chain Reaction Market Overview by Application Area

2.6.1.3 French Polymerase Chain Reaction Market Overview by End-Use Sector

2.6.2 Germany

2.6.2.1 German Polymerase Chain Reaction Market Overview by Product Segment

2.6.2.2 German Polymerase Chain Reaction Market Overview by Application Area

2.6.2.3 German Polymerase Chain Reaction Market Overview by End-Use Sector

2.6.3 Italy

2.6.3.1 Italian Polymerase Chain Reaction Market Overview by Product Segment

2.6.3.2 Italian Polymerase Chain Reaction Market Overview by Application Area

2.6.3.3 Italian Polymerase Chain Reaction Market Overview by End-Use Sector

2.6.4 The United Kingdom

2.6.4.1 United Kingdom Polymerase Chain Reaction Market Overview by Product Segment

2.6.4.2 United Kingdom Polymerase Chain Reaction Market Overview by Application Area

2.6.4.3 United Kingdom Polymerase Chain Reaction Market Overview by End-Use

## Sector

### 2.6.5 Rest of Europe

#### 2.6.5.1 Rest of Europe Polymerase Chain Reaction Market Overview by Product

## Segment

#### 2.6.5.2 Rest of Europe Polymerase Chain Reaction Market Overview by Application

## Area

#### 2.6.5.3 Rest of Europe Polymerase Chain Reaction Market Overview by End-Use

## Sector

## **3. ASIA-PACIFIC**

### 3.1 Asia-Pacific Polymerase Chain Reaction Market Overview by Geographic Region

### 3.2 Asia-Pacific Polymerase Chain Reaction Market Overview by Product Segment

#### 3.2.1 Polymerase Chain Reaction Product Segment Market Overview by Asia-Pacific Region

##### 3.2.1.1 Instruments

##### 3.2.1.2 Reagents & Consumables

##### 3.2.1.3 Software & Services

### 3.3 Asia-Pacific Polymerase Chain Reaction Market Overview by Application Area

#### 3.3.1 Polymerase Chain Reaction Application Area Market Overview by Asia-Pacific Region

##### 3.3.1.1 Clinical Diagnostics

##### 3.3.1.2 Life Sciences

##### 3.3.1.3 Other Applications

### 3.4 Asia-Pacific Polymerase Chain Reaction Market Overview by End-Use Sector

#### 3.4.1 Polymerase Chain Reaction End-Use Sector Market Overview by Asia-Pacific Region

##### 3.4.1.1 Academic & Research Institutes

##### 3.4.1.2 Clinical Diagnostics Labs & Hospitals

##### 3.4.1.3 Pharmaceutical & Biotechnology Sectors

##### 3.4.1.4 Other End-Use Sectors

### 3.5 Major Market Players

Hokkaido System Science Co., Ltd. (Japan)

Ocimum Biosolutions Ltd. (India)

Shimadzu Corporation (Japan)

### 3.6 Country-wise Analysis of Asia-Pacific Polymerase Chain Reaction Market

#### 3.6.1 China

##### 3.6.1.1 Chinese Polymerase Chain Reaction Market Overview by Product Segment

##### 3.6.1.2 Chinese Polymerase Chain Reaction Market Overview by Application Area

### 3.6.1.3 Chinese Polymerase Chain Reaction Market Overview by End-Use Sector

### 3.6.2 India

#### 3.6.2.1 Indian Polymerase Chain Reaction Market Overview by Product Segment

#### 3.6.2.2 Indian Polymerase Chain Reaction Market Overview by Application Area

#### 3.6.2.3 Indian Polymerase Chain Reaction Market Overview by End-Use Sector

### 3.6.3 Japan

#### 3.6.3.1 Japanese Polymerase Chain Reaction Market Overview by Product Segment

#### 3.6.3.2 Japanese Polymerase Chain Reaction Market Overview by Application Area

#### 3.6.3.3 Japanese Polymerase Chain Reaction Market Overview by End-Use Sector

### 3.6.4 South Korea

#### 3.6.4.1 South Korean Polymerase Chain Reaction Market Overview by Product Segment

#### 3.6.4.2 South Korean Polymerase Chain Reaction Market Overview by Application Area

#### 3.6.4.3 South Korean Polymerase Chain Reaction Market Overview by End-Use Sector

### 3.6.5 Rest of Asia-Pacific

#### 3.6.5.1 Rest of Asia-Pacific Polymerase Chain Reaction Market Overview by Product Segment

#### 3.6.5.2 Rest of Asia-Pacific Polymerase Chain Reaction Market Overview by Application Area

#### 3.6.5.3 Rest of Asia-Pacific Polymerase Chain Reaction Market Overview by End-Use Sector

## 4. REST OF WORLD

### 4.1 Rest of World Polymerase Chain Reaction Market Overview by Product Segment

### 4.2 Rest of World Polymerase Chain Reaction Market Overview by Application Area

### 4.3 Rest of World Polymerase Chain Reaction Market Overview by End-Use Sector

HY Laboratories Ltd (Hylabs) (Israel) – A Major Market Player

## PART C: GUIDE TO THE INDUSTRY

### 1. NORTH AMERICA

### 2. EUROPE

### 3. ASIA-PACIFIC

## 4. REST OF WORLD

### PART D: ANNEXURE

#### 1. RESEARCH METHODOLOGY

#### 2. FEEDBACK

### CHARTS & GRAPHS

#### PART A: GLOBAL MARKET PERSPECTIVE

Chart 1: Global Polymerase Chain Reaction (PCR) Market by Geographic Region (2017 & 2022) in USD Million

Chart 2: Global Polymerase Chain Reaction (PCR) Market by Application & End-Use Sector (2022) in USD Million

Chart 3: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 4: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 5: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 6: Global Polymerase Chain Reaction (PCR) Instruments Market Analysis (2014-2022) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 7: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Instruments Market Share (%) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 8: Global Polymerase Chain Reaction (PCR) Reagents & Consumables Market Analysis (2014-2022) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 9: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Reagents & Consumables Market Share (%) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 10: Global Polymerase Chain Reaction (PCR) Software & Services Market Analysis (2014-2022) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million



Chart 11: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Software & Services Market Share (%) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 12: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 13: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 14: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 15: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 16: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Life Sciences by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 17: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Life Sciences by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 18: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other Applications by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 19: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Other Applications by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 20: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 21: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

Chart 22: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Academic & Research Institutes by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 23: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR)

Market Share (%) in Academic & Research Institutes by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 24: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics Labs & Hospitals by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 25: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics Labs & Hospitals by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 26: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Pharmaceutical & Biotechnology Sectors by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 27: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Pharmaceutical & Biotechnology Sectors by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

Chart 28: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other End-Use Sectors by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 29: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) in Other End-Use Sectors by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

## **PART B: REGIONAL MARKET PERSPECTIVE**

Chart 30: Global Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World in USD Million

Chart 31: Glance at 2014, 2017 and 2022 Global Polymerase Chain Reaction (PCR) Market Share (%) by Geographic Region – North America, Europe, Asia-Pacific and Rest of World

## **REGIONAL MARKET OVERVIEW**

### **NORTH AMERICA**

Chart 32: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 33: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Geographic Region – United States, Canada and Mexico in USD Million

Chart 34: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction

(PCR) Market Share (%) by Geographic Region – United States, Canada and Mexico  
Chart 35: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 36: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 37: North American Polymerase Chain Reaction (PCR) Instruments Market Analysis (2014-2022) by Geographic Region – United States, Canada and Mexico in USD Million

Chart 38: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Instruments Market Share (%) by Geographic Region – United States, Canada and Mexico

Chart 39: North American Polymerase Chain Reaction (PCR) Reagents & Consumables Market Analysis (2014-2022) by Geographic Region – United States, Canada and Mexico in USD Million

Chart 40: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Reagents & Consumables Market Share (%) by Geographic Region – United States, Canada and Mexico

Chart 41: North American Polymerase Chain Reaction (PCR) Software & Services Market Analysis (2014-2022) by Geographic Region – United States, Canada and Mexico in USD Million

Chart 42: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Software & Services Market Share (%) by Geographic Region – United States, Canada and Mexico

Chart 43: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 44: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 45: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics by Geographic Region – United States, Canada and Mexico in USD Million

Chart 46: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics by Geographic Region – United States, Canada and Mexico

Chart 47: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Life Sciences by Geographic Region – United States, Canada and

Mexico in USD Million

Chart 48: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Life Sciences by Geographic Region – United States, Canada and Mexico

Chart 49: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other Applications by Geographic Region – United States, Canada and Mexico in USD Million

Chart 50: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Other Applications by Geographic Region – United States, Canada and Mexico

Chart 51: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 52: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

Chart 53: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Academic & Research Institutes by Geographic Region – United States, Canada and Mexico in USD Million

Chart 54: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Academic & Research Institutes by Geographic Region – United States, Canada and Mexico

Chart 55: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics Labs & Hospitals by Geographic Region – United States, Canada and Mexico in USD Million

Chart 56: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics Labs & Hospitals by Geographic Region – United States, Canada and Mexico

Chart 57: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Pharmaceutical & Biotechnology Sectors by Geographic Region – United States, Canada and Mexico in USD Million

Chart 58: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Pharmaceutical & Biotechnology Sectors by Geographic Region – United States, Canada and Mexico

Chart 59: North American Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other End-Use Sectors by Geographic Region – United States, Canada and Mexico in USD Million

Chart 60: Glance at 2014, 2017 and 2022 North American Polymerase Chain Reaction (PCR) Market Share (%) in Other End-Use Sectors by Geographic Region – United States, Canada and Mexico

## **THE UNITED STATES**

Chart 61: United States Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 62: United States Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 63: Glance at 2014, 2017 and 2022 United States Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 64: United States Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 65: Glance at 2014, 2017 and 2022 United States Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 66: United States Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 67: Glance at 2014, 2017 and 2022 United States Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **CANADA**

Chart 68: Canadian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 69: Canadian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 70: Glance at 2014, 2017 and 2022 Canadian Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 71: Canadian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 72: Glance at 2014, 2017 and 2022 Canadian Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 73: Canadian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 74: Glance at 2014, 2017 and 2022 Canadian Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **MEXICO**

Chart 75: Mexican Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 76: Mexican Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 77: Glance at 2014, 2017 and 2022 Mexican Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 78: Mexican Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 79: Glance at 2014, 2017 and 2022 Mexican Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 80: Mexican Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 81: Glance at 2014, 2017 and 2022 Mexican Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## EUROPE

Chart 82: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 83: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 84: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 85: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 86: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 87: European Polymerase Chain Reaction (PCR) Instruments Market Analysis (2014-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 88: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Instruments Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 89: European Polymerase Chain Reaction (PCR) Reagents & Consumables Market Analysis (2014-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 90: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Reagents & Consumables Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 91: European Polymerase Chain Reaction (PCR) Software & Services Market Analysis (2014-2022) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 92: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Software & Services Market Share (%) by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 93: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 94: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR)

Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 95: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 96: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 97: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Life Sciences by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 98: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Life Sciences by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 99: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other Applications by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 100: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Other Applications by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 101: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 102: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

Chart 103: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Academic & Research Institutes by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 104: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Academic & Research Institutes by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 105: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics Labs & Hospitals by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 106: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics Labs & Hospitals by Geographic Region



– France, Germany, Italy, United Kingdom and Rest of Europe

Chart 107: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Pharmaceutical & Biotechnology Sectors by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 108: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Pharmaceutical & Biotechnology Sectors by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

Chart 109: European Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other End-Use Sectors by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe in USD Million

Chart 110: Glance at 2014, 2017 and 2022 European Polymerase Chain Reaction (PCR) Market Share (%) in Other End-Use Sectors by Geographic Region – France, Germany, Italy, United Kingdom and Rest of Europe

## **FRANCE**

Chart 111: French Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 112: French Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 113: Glance at 2014, 2017 and 2022 French Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 114: French Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 115: Glance at 2014, 2017 and 2022 French Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 116: French Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 117: Glance at 2014, 2017 and 2022 French Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **GERMANY**

Chart 118: German Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 119: German Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 120: Glance at 2014, 2017 and 2022 German Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 121: German Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 122: Glance at 2014, 2017 and 2022 German Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 123: German Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 124: Glance at 2014, 2017 and 2022 German Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **ITALY**

Chart 125: Italian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 126: Italian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 127: Glance at 2014, 2017 and 2022 Italian Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 128: Italian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 129: Glance at 2014, 2017 and 2022 Italian Polymerase Chain Reaction (PCR)

Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 130: Italian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 131: Glance at 2014, 2017 and 2022 Italian Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **THE UNITED KINGDOM**

Chart 132: United Kingdom Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 133: United Kingdom Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 134: Glance at 2014, 2017 and 2022 United Kingdom Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 135: United Kingdom Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 136: Glance at 2014, 2017 and 2022 United Kingdom Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 137: United Kingdom Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 138: Glance at 2014, 2017 and 2022 United Kingdom Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **REST OF EUROPE**

Chart 139: Rest of Europe Polymerase Chain Reaction (PCR) Market Analysis

(2014-2022) in USD Million

Chart 140: Rest of Europe Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 141: Glance at 2014, 2017 and 2022 Rest of Europe Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 142: Rest of Europe Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 143: Glance at 2014, 2017 and 2022 Rest of Europe Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 144: Rest of Europe Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 145: Glance at 2014, 2017 and 2022 Rest of Europe Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **ASIA-PACIFIC**

Chart 146: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 147: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 148: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 149: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 150: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 151: Asia-Pacific Polymerase Chain Reaction (PCR) Instruments Market Analysis

(2014-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 152: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Instruments Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 153: Asia-Pacific Polymerase Chain Reaction (PCR) Reagents & Consumables Market Analysis (2014-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 154: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Reagents & Consumables Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 155: Asia-Pacific Polymerase Chain Reaction (PCR) Software & Services Market Analysis (2014-2022) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 156: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Software & Services Market Share (%) by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 157: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 158: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 159: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 160: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 161: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Life Sciences by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 162: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Life Sciences by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 163: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other Applications by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 164: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction

(PCR) Market Share (%) in Other Applications by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 165: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 166: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

Chart 167: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Academic & Research Institutes by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 168: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Academic & Research Institutes by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 169: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Clinical Diagnostics Labs & Hospitals by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 170: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Clinical Diagnostics Labs & Hospitals by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 171: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Pharmaceutical & Biotechnology Sectors by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 172: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Pharmaceutical & Biotechnology Sectors by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

Chart 173: Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in Other End-Use Sectors by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific in USD Million

Chart 174: Glance at 2014, 2017 and 2022 Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) in Other End-Use Sectors by Geographic Region – China, India, Japan, South Korea and Rest of Asia-Pacific

## **CHINA**

Chart 175: Chinese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 176: Chinese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 177: Glance at 2014, 2017 and 2022 Chinese Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 178: Chinese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 179: Glance at 2014, 2017 and 2022 Chinese Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 180: Chinese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 181: Glance at 2014, 2017 and 2022 Chinese Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **INDIA**

Chart 182: Indian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 183: Indian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 184: Glance at 2014, 2017 and 2022 Indian Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 185: Indian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 186: Glance at 2014, 2017 and 2022 Indian Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 187: Indian Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs &

Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 188: Glance at 2014, 2017 and 2022 Indian Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **JAPAN**

Chart 189: Japanese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 190: Japanese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 191: Glance at 2014, 2017 and 2022 Japanese Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 192: Japanese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 193: Glance at 2014, 2017 and 2022 Japanese Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 194: Japanese Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 195: Glance at 2014, 2017 and 2022 Japanese Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **SOUTH KOREA**

Chart 196: South Korean Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 197: South Korean Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million



Chart 198: Glance at 2014, 2017 and 2022 South Korean Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 199: South Korean Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 200: Glance at 2014, 2017 and 2022 South Korean Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 201: South Korean Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 202: Glance at 2014, 2017 and 2022 South Korean Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **REST OF ASIA-PACIFIC**

Chart 203: Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 204: Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 205: Glance at 2014, 2017 and 2022 Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 206: Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 207: Glance at 2014, 2017 and 2022 Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 208: Rest of Asia-Pacific Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 209: Glance at 2014, 2017 and 2022 Rest of Asia-Pacific Polymerase Chain

Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## **REST OF WORLD**

Chart 210: Rest of World Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) in USD Million

Chart 211: Rest of World Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Product Segment – Instruments, Reagents & Consumables and Software & Services in USD Million

Chart 212: Glance at 2014, 2017 and 2022 Rest of World Polymerase Chain Reaction (PCR) Market Share (%) by Product Segment – Instruments, Reagents & Consumables and Software & Services

Chart 213: Rest of World Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications in USD Million

Chart 214: Glance at 2014, 2017 and 2022 Rest of World Polymerase Chain Reaction (PCR) Market Share (%) by Application Area – Clinical Diagnostics, Life Sciences and Other Applications

Chart 215: Rest of World Polymerase Chain Reaction (PCR) Market Analysis (2014-2022) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors in USD Million

Chart 216: Glance at 2014, 2017 and 2022 Rest of World Polymerase Chain Reaction (PCR) Market Share (%) by End-Use Sector – Academic & Research Institutes, Clinical Diagnostics Labs & Hospitals, Pharmaceutical & Biotechnology Sectors and Other End-Use Sectors

## Tables

### **TABLES:**

Table 1: PCR Additives and their Mechanism of Action

Table 2: PCR Inhibitors and their Mechanism of Action

Table 3: Differences Between Conventional PCR and Digital PCR

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