

# **Cell-based Assay Market Report by Product and Services (Consumables, Instruments, Services, Software), Technology (Automated Handling, Flow Cytometry, Label-Free Detection, High-Throughput Screening, and Others), Application (Drug Discovery, Basic Research, ADME Studies, Predictive Toxicology, and Others), End-User (Pharmaceutical and Biotechnology Companies, Academic and Government Institutions, Contract Research Organizations, and Others), and Region 2024-2032**

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## **Abstracts**

The global cell-based assay market size reached US\$ 22.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 42.9 Billion by 2032, exhibiting a growth rate (CAGR) of 7.2% during 2024-2032. The growing demand for novel therapies to address various diseases, rising focus on personalized medicines, and innovations in cell culture technologies to improve the accuracy of drug screening are some of the major factors propelling the market.

A cell-based assay, also known as a cellular assay, is a laboratory technique that is used in various scientific and medical fields to assess the biological activity of cells in response to specific substances or conditions. It comprises culturing living cells in controlled environments and exposing them to various stimuli, such as drugs, compounds, or environmental factors. As it allows researchers to gain critical insights into the effects of the tested substances on cellular function by monitoring changes in cell behavior, such as cell viability or the expression of specific biomarkers, the demand

for cell-based assay is increasing worldwide.

At present, the rising adoption of cell-based assays for drug discovery, toxicology studies, disease modeling, and understanding cellular mechanisms is supporting the growth of the market. Besides this, the increasing need to evaluate the potential efficacy and safety of pharmaceutical compounds is strengthening the growth of the market. Additionally, the growing demand for cell-based assays, as they enable researchers to identify potential adverse effects early in the development process and assess the toxicity of chemicals, is positively influencing the market. Apart from this, increasing incidences of numerous chronic diseases, such as cancer, diabetes, and autoimmune disorders, among individuals around the world are offering lucrative growth opportunities to industry investors. Furthermore, the rising need to assess the impact of chemicals and pollutants on plant and aquatic systems is bolstering the growth of the market.

#### Cell-Based Assay Market Trends/Drivers:

##### Rising demand for novel therapies to address various diseases

The rising focus on drug discovery and development, along with the increasing demand for novel therapies to address various chronic diseases among individuals across the globe, is contributing to the growth of the market. In addition, cell-based assays enable researchers to screen and evaluate a vast number of potential drug candidates quickly and efficiently. By exposing cells to different compounds, scientists can assess their impact on cellular behavior, including their efficacy and safety profiles. Apart from this, there is an increase in the focus on precision medicine that necessitates a deep understanding of how drugs interact with specific cellular pathways. Moreover, these assays provide a platform for tailoring drug treatments to individual patient profiles.

##### Increasing focus on personalized medicines

The rising focus on personalized medicines among the masses is supporting the growth of the market. In line with this, healthcare facilities are rapidly focusing on treatment solutions that are customized to suit the genetic, molecular, and cellular characteristics of individual patients. Besides this, cell-based assays allow researchers to evaluate the response of patient-derived cells to various drugs and treatments and enable the identification of the most effective therapies while minimizing potential side effects. In addition, personalized medicine not only improves treatment outcomes but also reduces healthcare costs by avoiding ineffective treatments. As a result, there is an increase in the adoption of cell-based assays in both clinical and research settings, as they provide

a powerful tool for tailoring medical interventions to the specific needs of patients.

### Innovations in cell culture technologies

Advancements in cell culture techniques are enhancing the capabilities of cell-based assays. 3D cultures and organoids allow researchers to study cell behavior closer to the human body to improve the accuracy of drug screening and toxicity testing, which is offering a positive market outlook. Additionally, microfluidics and lab-on-a-chip technologies enable the development of miniaturized and automated cell-based assays that assist in increasing throughput and efficiency in drug discovery. In line with this, the integration of these advanced cell culture technologies into cell-based assays aids in enhancing their relevance and applicability, which makes them suitable tools for understanding disease mechanisms and evaluating drug candidates with greater precision.

### Cell-Based Assay Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global cell-based assay market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on product and services, technology, application and end-user.

### Breakup by Product and Services:

- Consumables
  - Reagents and Media
  - Cells and Cell Lines
  - Probes and Labels
- Instruments
  - Microplates
  - Microplate Readers
  - High Throughput Screening
  - Liquid Handling Systems
- Services
- Software

Consumables represent the largest market segment

The report has provided a detailed breakup and analysis of the market based on the product and services. This includes consumables (reagents and media, cells and cell

lines, and probes and labels), instruments (microplates, microplate readers, high throughput screening, and liquid handling systems), services, and software. According to the report, consumables represented the largest segment. Consumables refer to a wide range of disposable laboratory materials and reagents that are essential for conducting cell-based experiments and assays. They include cell culture media, reagents for cell proliferation and viability assays, cell culture plates, assay kits, antibodies, and other materials used on a one-time or limited-use basis. In addition, consumables ensure the proper growth and maintenance of cells in culture and provide the necessary tools for detecting cellular responses that enable the execution of various assays efficiently. They play a crucial role in ensuring the accuracy, reproducibility, and reliability of results in cell-based experiments.

#### Breakup by Technology:

- Automated Handling
- Flow Cytometry
- Label-Free Detection
- High-Throughput Screening
- Others

High-throughput screening accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the technology. This includes automated handling, flow cytometry, label-free detection, high-throughput screening, and others. According to the report, high-throughput screening represented the largest segment. High-throughput screening (HTS) is a technology-driven approach used in drug discovery, which allows researchers to quickly test thousands to millions of compounds for their biological activity. HTS systems are designed to automate the screening process and enable the rapid evaluation of potential drug candidates. It involves the use of robotic systems and specialized equipment to perform assays on a large scale. It typically utilizes microplates with multiple wells, where each well contains cells or biochemical components for testing. The technology allows for the identification of compounds that exhibit desired biological effects, such as binding to a specific target or modulating a cellular response.

#### Breakup by Application:

- Drug Discovery
- Basic Research

ADME Studies  
Predictive Toxicology  
Others

Drug discovery dominates the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes drug discovery, basic research, ADME studies, predictive toxicology, and others. According to the report, drug discovery represented the largest segment. Drug discovery refers to the techniques and technologies used to administer therapeutic substances, such as drugs or biologics, to the targeted cells or tissues within the body. These assays play a critical role in the development and optimization of drug delivery systems by providing valuable insights into their efficacy and safety. In addition, they are used to assess targeted delivery, screen for cellular uptake, evaluate drug release kinetics, and assay drug toxicity. Researchers employ cell-based models to evaluate the ability of drug delivery systems, such as nanoparticles or liposomes, to specifically target and interact with particular cell types or tissues.

Breakup by End-User:

Pharmaceutical and Biotechnology Companies  
Academic and Government Institutions  
Contract Research Organizations  
Others

Pharmaceutical and biotechnology companies hold the biggest market share

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes pharmaceutical and biotechnology companies, academic and government institutions, contract research organizations, and others. According to the report, pharmaceutical and biotechnology companies represented the largest segment. Pharmaceutical and biotechnology employ these assays to identify and validate potential drug candidates, assess their efficacy, and evaluate safety profiles. They enable high-throughput screening of compound libraries that enhance the drug development pipeline. In line with this, these companies utilize these assays to ensure the safety of drug candidates. These assays assist in assessing the cytotoxicity and potential adverse effects of compounds that benefit companies complying with regulatory requirements. Moreover, these assays are employed for quality control purposes to ensure the consistency and reliability of pharmaceutical and

biotechnological products.

#### Breakup by Region:

North America

Europe

Asia Pacific

Middle East and Africa

Latin America

North America exhibits a clear dominance, accounting for the largest cell-based assay market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest market share due to the increasing demand for advanced assay technologies and consumables. In addition, the rising development of novel cell-based assay techniques is bolstering the growth of the market in the region. Apart from this, the growing focus on drug safety is positively influencing the market. In line with this, stringent regulatory standards are propelling the growth of the market in the North America region.

#### Competitive Landscape:

Major players are developing innovative assay technologies, such as novel reagents, assay kits, and platforms. This involves creating more physiologically relevant cell models to improve assay sensitivity and enhance automation and data analysis capabilities. In line with this, companies are expanding their product portfolios to cater to a wide range of applications. This includes offering assays tailored for specific targets, pathways, or disease models, and developing specialized kits for toxicity testing and drug screening. Apart from this, key manufacturers are providing customized assay development services and are working closely with clients to tailor assays to their specific research needs, which is offering a positive market outlook.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Becton, Dickinson and Company  
Global Life Sciences Solutions USA LLC (DBA Cytiva)  
Thermo Fisher Scientific Inc.  
Merck Group  
PerkinElmer Inc.  
Charles River Laboratories Inc.  
Lonza Group Ltd.  
Cell Signaling Technology  
Promega Corporation  
Cell Biolabs Inc.  
Eurofins DiscoverX Corporation  
Bio-Rad Laboratories Inc.  
Corning Inc.  
F. Hoffmann-La Roche AG (Roche Holding AG)

#### Recent Developments:

In December 2021, Thermo Fisher Scientific Inc. announced that it has completed its acquisition of PPD, Inc. to provide a complete suite of services across the clinical development spectrum, comprising scientific discovery, safety, efficacy and healthcare outcome assessment, handling trial logistics, and the development and production of the therapeutics.

In March 2022, Promega Corporation and FUJIFILM Cellular Dynamics, Inc. announced a strategic collaboration to advance novel assay development for drug discovery. The collaboration will merge bioluminescent reporter technology used to study cellular signaling and transcriptional activity in iPSCs.

In 2022, BD (Becton, Dickinson and Company) introduced the BD Rhapsody™ TCR/BCR Multiomic Assay, an innovative set of reagents that enables researchers to more easily and comprehensively analyze important cells in the immune system and provide a tool to advance research in autoimmune disorders, immuno-oncology and infectious diseases.

#### Key Questions Answered in This Report

1. What was the size of the global cell-based assay market in 2023?
2. What is the expected growth rate of the global cell-based assay market during 2024-2032?
3. What are the key factors driving the global cell-based assay market?
4. What has been the impact of COVID-19 on the global cell-based assay market?



5. What is the breakup of the global cell-based assay market based on the product and services?
6. What is the breakup of the global cell-based assay market based on the technology?
7. What is the breakup of the global cell-based assay market based on the application?
8. What is the breakup of the global cell-based assay market based on the end-user?
9. What are the key regions in the global cell-based assay market?
10. Who are the key players/companies in the global cell-based assay market?



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