

Digital PCR Market Report by Product Type (Digital PCR Equipment, Consumables and Reagents, Software and Services), Technology (Droplet Digital PCR, BEAMing Digital PCR), Application (Clinical Diagnostics, Forensics, Research, and Others), and Region 2024-2032

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Abstracts

The global digital PCR market size reached US\$ 4.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 10.7 Billion by 2032, exhibiting a growth rate (CAGR) of 9.25% during 2024-2032. The increased precision in nucleic acid qualification, rising demand for liquid biopsies, significant advancements in genomic research, expanding biotechnology and pharmaceutical industries, and extensive research and investment activities are some of the major factors propelling the market.

Digital PCR, or digital polymerase chain reaction, is a highly precise and advanced molecular biology technique used for quantifying and analyzing nucleic acids, such as DNA and RNA, in various applications. Unlike traditional PCR, which provides only a single endpoint measurement, digital PCR partitions the sample into thousands of tiny individual reactions, either physically or digitally. This allows for the absolute quantification of the target nucleic acid, offering unparalleled sensitivity and accuracy. Digital PCR is instrumental in fields like genomics, clinical diagnostics, and environmental monitoring. Its ability to detect rare mutations, quantify gene expression, and assess viral loads has made it a valuable tool in understanding genetic diseases, monitoring treatment responses, and studying microbial communities. Its quantitative nature and minimal susceptibility to inhibitors make it highly reliable in critical applications.

Digital PCR offers superior accuracy and sensitivity in nucleic acid quantification, making it an indispensable tool in genomics, diagnostics, and pharmaceutical research. Additionally, liquid biopsies for cancer detection and monitoring are gaining traction. The ability of dPCR to detect rare mutations and copy number variations in blood and other bodily fluids fuels its adoption in this critical field. Other than this, dPCR plays a pivotal role in diagnosing infectious diseases, genetic disorders, and monitoring viral loads. This is particularly crucial in the context of global health concerns, such as the COVID-19 pandemic. Besides this, the biotech and pharmaceutical sectors continually demand robust tools for research and development. dPCR meets this need by enabling precise quantification in drug development and biomanufacturing processes. In line with this, environmental monitoring, including the detection of pathogens in water and soil, relies on dPCR for its accuracy and reliability in detecting low-level contaminants. Moreover, genomic research is expanding, driven by the need to understand genetic contributions to diseases and develop personalized medicine. dPCR facilitates precise genetic analysis, aiding in breakthrough discoveries.

Digital PCR Market Trends/Drivers:

Increased Precision in Nucleic Acid Quantification

Digital PCR offers an unparalleled level of precision in quantifying nucleic acids. Unlike traditional quantitative PCR (qPCR), which relies on relative measurements, dPCR provides absolute quantification. This precision is achieved by partitioning the sample into thousands of separate reactions, effectively counting the number of target molecules present. This level of accuracy is essential in various applications, such as detecting rare genetic mutations in cancer, ensuring the reliability of diagnostic tests, and tracking viral load changes in infectious diseases.

Rising Demand for Liquid Biopsies

Liquid biopsies, which involve analyzing blood or other bodily fluids for cancer-related biomarkers, are becoming increasingly important in early cancer detection and treatment monitoring. Digital PCR's sensitivity enables the detection of minute amounts of mutated DNA or RNA, making it a pivotal technology in liquid biopsy assays. Clinicians can use dPCR to identify specific genetic mutations associated with various cancers, providing valuable information for personalized treatment strategies.

Significant Advancements in Genomic Research

The field of genomics continues to evolve, driven by the need to understand the genetic

basis of diseases and develop targeted therapies. Digital PCR plays a central role in this research by allowing scientists to precisely quantify gene expression, detect rare genetic variants, and study copy number variations. These capabilities are vital for uncovering genetic factors contributing to diseases, identifying potential drug targets, and optimizing therapeutic interventions. As genomic research expands, so does the demand for dPCR as a tool that offers both accuracy and reproducibility in genetic analysis.

Digital PCR Industry Segmentation:

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

Breakup by Product Type:

- Digital PCR Equipment
- Consumables and Reagents
- Software and Services

Digital PCR equipment dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes digital PCR equipment, consumables and reagents, and software and service. According to the report, digital PCR equipment represented the largest segment.

The pivotal role of digital PCR equipment in molecular biology and genetic research positions it as a fundamental tool in laboratories worldwide. The demand for precise nucleic acid quantification, which digital PCR equipment excels in, continues to rise across various applications, including genomics, diagnostics, and environmental monitoring. Additionally, as scientific understanding advances and the need for high-throughput and sensitive techniques grows, digital PCR equipment stands out as the preferred choice. Its ability to detect and quantify rare genetic mutations, copy number variations, and low-level viral loads has made it indispensable in fields like cancer research, infectious disease diagnostics, and monitoring of genetic disorders. Furthermore, ongoing technological advancements in digital PCR platforms, automation, and integration with other laboratory systems have made this equipment more user-friendly and efficient, driving its adoption in both research and clinical

settings.

Breakup by Technology:

Droplet Digital PCR
BEAMing Digital PCR

Droplet digital PCR holds the largest share in the market

A detailed breakup and analysis of the market based on technology has also been provided in the report. This includes droplet digital PCR and BEAMing digital PCR. According to the report, droplet digital PCR accounted for the largest market share.

Droplet digital PCR (ddPCR), combines the precision of digital PCR (dPCR) with increased throughput, making it an attractive choice for researchers and diagnosticians. This technology partitions a sample into thousands of tiny droplets, each serving as an individual reaction vessel. This parallelization significantly enhances the sensitivity and accuracy of nucleic acid quantification. Additionally, ddPCR excels in applications that require absolute quantification, especially in situations where rare mutations, copy number variations, or low-abundance targets need to be detected. Its ability to provide an absolute count of target molecules within a sample, rather than relying on relative measurements, is a significant advantage in genomics, cancer research, and clinical diagnostics. Other than this, ddPCR offers robustness in the presence of inhibitors, making it suitable for challenging sample types, such as those found in environmental monitoring or clinical specimens. This resilience to inhibitory substances enhances the reliability and versatility of technology.

Breakup by Application:

Clinical Diagnostics
Forensics
Research
Others

Clinical diagnostics dominate the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes clinical diagnostics, forensics, research, and others. According to the report, clinical diagnostics represented the largest segment.

The ever-growing emphasis on healthcare and wellness globally has spurred an increased demand for accurate and timely diagnostic tests. As the population ages and health concerns become more prevalent, the need for early disease detection and monitoring has surged, leading to a substantial uptick in clinical diagnostic services. Furthermore, advancements in technology have played a pivotal role in enhancing the precision and speed of diagnostic procedures, making them more accessible and reliable. In addition, the COVID-19 pandemic brought to the forefront the importance of diagnostic testing, underscoring the critical role of clinical diagnostics in public health.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance in the market

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America has a well-established and highly sophisticated healthcare infrastructure, including a robust network of clinical laboratories and research institutions. This infrastructure fosters the adoption of advanced molecular diagnostic techniques like dPCR, particularly in the United States and Canada, where healthcare expenditure is substantial. Additionally, the region is at the forefront of genomics and personalized medicine research. The demand for precise nucleic acid quantification technologies like dPCR is driven by the region's extensive genomic research initiatives and the increasing emphasis on tailoring medical treatments to individual patients. Other than this, the region has a thriving biotechnology and pharmaceutical industry that relies heavily on dPCR for drug development, clinical trials, and quality control processes. The versatility and accuracy of dPCR technology make it an essential tool in these sectors. Furthermore, North America has been quick to adopt innovative diagnostic technologies, especially in response to public health crises like the COVID-19 pandemic. The use of dPCR for virus detection and monitoring has further propelled its growth in the region.

Competitive Landscape:

Leading companies consistently invest in R&D to develop innovative dPCR platforms with improved sensitivity, automation, and scalability. These advancements cater to the evolving needs of researchers and clinicians across various applications. Additionally, numerous major players have established collaborations with academic institutions, research organizations, and other industry stakeholders. These partnerships facilitate the exchange of knowledge, expertise, and resources, leading to the development of cutting-edge dPCR technologies. Other than this, to address a wide range of applications, key players have expanded their product portfolios to include different dPCR platforms and consumables. This allows them to cater to diverse customer needs and preferences. Besides this, companies have pursued strategies to expand their presence in emerging markets, capitalizing on the increasing adoption of dPCR technologies in regions with growing healthcare and biotechnology sectors. In line with this, key players invest in marketing campaigns to raise awareness about the benefits of dPCR. These efforts target both existing and potential customers, highlighting the advantages of technology in research, diagnostics, and other applications.

The market research 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:

Avance Biosciences Inc.
Bio-Rad Laboratories Inc.
Danaher Corporation
JN Medsys
OPTOLANE Technologies Inc.
QIAGEN
SAGA Diagnostics AB
Standard BioTools Inc.
Stilla Technologies
Sysmex Corporation
Thermo Fisher Scientific Inc.

Recent Developments:

Standard Bio Tools Inc. has recently unveiled the X9 Real-Time PCR System, a cutting-edge genomics instrument designed to deliver exceptional efficiency. This innovative device boasts a high capacity, making it a standout choice for genomics research. The X9 Real-Time PCR System represents a significant advancement in the field, enabling researchers to perform real-time polymerase chain reactions with remarkable precision. Its high capacity ensures that a wide range of genetic analyses can be conducted efficiently and effectively.

Stilla Technologies and Promega Corporation have joined forces through a strategic co-marketing agreement, bringing together the expertise of both companies in the realms of sample preparation and cutting-edge genomics technology. This collaboration focuses on harnessing the power of the latest Maxwell systems and digital polymerase chain reaction (PCR) using the six-color Naica system. The partnership between Stilla and Promega Corporation signifies a significant step forward in the field of molecular biology and genomics. By integrating the capabilities of Maxwell systems and digital PCR on the Naica platform, researchers will gain access to a comprehensive and highly advanced solution for their analytical needs.

QIAGEN and GT Molecular have jointly revealed an exciting collaboration aimed at delivering a comprehensive solution for the detection of SARS-CoV-2 in wastewater. This innovative solution is built upon QIAcuity digital PCR technology, signifying a significant advancement in the field of environmental monitoring for viral pathogens. The partnership between QIAGEN and GT Molecular reflects their shared commitment to

addressing critical public health challenges, particularly in the context of the ongoing COVID-19 pandemic.

Key Questions Answered in This Report

1. How big is the global digital PCR market?
2. What is the expected growth rate of the global digital PCR market during 2024-2032?
3. What are the key factors driving the global digital PCR market?
4. What has been the impact of COVID-19 on the global digital PCR market?
5. What is the breakup of the global digital PCR market based on the product type?
6. What is the breakup of the global digital PCR market based on the technology?
7. What is the breakup of the global digital PCR market based on the application?
8. What are the key regions in the global digital PCR market?
9. Who are the key players/companies in the global digital PCR market?

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