

Cell-Based Assays Global Market – Forecast To 2025

<https://marketpublishers.com/r/CF7BE25397AEN.html>

Date: May 2019

Pages: 467

Price: US\$ 4,950.00 (Single User License)

ID: CF7BE25397AEN

Abstracts

Cell-based assays refer to use of live cells in experiments, to analyze or understand various accepts of response by organism against an external therapeutic or toxic agent. The demand for cost-effective and relevant research tool in drug discovery, development and manufacturing, toxicity testing, ecotoxicology, biosafety and biocompatibility of cosmetics and chemicals is increasing interest in cell-based assays. The rise in research and the approvals of biologics and biosimilars are increasing utilization of cell-based assay as a tool for ensuring safety and potency of the product. The factors driving the market are rising use of the cell-based assay in drug discovery and development, increasing focus on biologics, technological advancements favoring the adoption of cell-based assays, the growing availability of funds for research. Whereas, factors such as lack of skilled professionals, ethical concerns over the use of raw materials from animal sources, high cost of instruments, lack of standardization, consistency and reproducibility issues are restraining the market growth.

According to IQ4I analysis, the Cell-based assays global market is is expected to grow at a CAGR of 8.0% to reach 20,053.4 million by 2025. Cell-based assays or bioassays are often an integral part of drug development in the pharma and biotech industry, which are a key component of preclinical, clinical and drug manufacturing processes. Other areas of application include, basic research, diagnostics and medical device testing, agro product and environmental testing, cosmetic testing, food and beverages testing and chemical and material testing. The Cell-based assays global market is segmented based on the products, applications, and geography. The Cell-based assays market by Products is segmented into Consumables, Instruments, and Software & Services. Among which, Consumables market commanded the largest share in 2018 growing at high single digit CAGR from 2018 to 2025.

The consumables market is further sub-segmented into assay kits, cells, microplates, reagents and others, among which reagents commanded the largest market share and

is expected to grow at high CAGR from 2018 to 2025. The assay kits are further classified based on research needs into reporter gene assay, second messenger, cell-growth assay, cell death assay, motility assays and others. Among which reporter gene assay commanded the largest revenue in 2018 and it is expected to grow at a strong CAGR, where, the increasing use of these assays in study of gene regulation, diagnostics, cell dynamics and development are factors driving the market. The cells market is sub-segmented based on source into primary cells, cell lines and stem cells, where, cell lines commanded the largest revenue in 2018 and the market is expected to grow at double digit CAGR from 2018 to 2025. The demand for cell lines in research because of the advantages such as, cost-effectiveness, ease of use, unlimited supply and bypassing of ethical concerns associated with the use of products of animal origin and human tissue are driving its growth. The emerging trend of a large number of service providers offering ready to use cell-based assay kits along with custom assay, cells and reagent development capabilities for research institutes, pharma, and biotech clients to carry out clinical and non-clinical development of pharmaceuticals, research activities, product testing to comply with regulatory requirements.

Microplate readers, liquid handling devices, flow cytometers, automated cell counters, microfluidic chips and cell microarrays, high throughput screening, high content screening, microscopes, and other instruments constitute the cell-based assays instrument market. Among which, microplate readers commanded the largest revenue in 2018, the market is expected to grow at a mid single digit CAGR from 2018 to 2025. With the advancements in label-free imaging and phenotypic screening methods in research, the microscopes market is expected to grow at a mid single digit CAGR from 2018 to 2025.

The cell-based assays geographical market consists of North America, Europe, Asia-Pacific and RoW, where North America dominates the market due to the presence of a large number of pharma-biotech companies, and investments for research from both public and private players. Asia-Pacific region is expected to show high single digit CAGR growth from 2018 to 2025, due to the presence of a large number of CROs and the emergence of this region as the manufacturing hub for biologics drugs.

Some of the key players in Cell-based assays global market are Danaher Corp. (U.S.), ThermoFisher Scientific (U.S.), Merck KGaA (Germany), Becton, Dickinson and Company (U.S.), Perkin Elmer, Inc. (U.S.), Lonza Group (Switzerland), Corning, Inc. (U.S.), Tecan Group (Switzerland), Bio-Rad Laboratories, Inc. (U.S.), Biotek Instruments (U.S.), Promega Corporation (U.S.) and GE Healthcare (U.S.).

The report provides an in-depth market analysis of the above-mentioned segments across the following regions:

North America

Europe

Asia-Pacific

Rest of the World (RoW)

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FIGURE 29 U.S. CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 30 U.S. CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 31 U.S. CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 32 REST OF NORTH AMERICA CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 33 REST OF NORTH AMERICA CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 34 REST OF NORTH AMERICA CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATIONS (2018 V/S 2025) (\$MN)

FIGURE 35 EUROPE CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, (2018 V/S 2025), CONSUMABLES, BY PRODUCT TYPE AND CELLS BY SOURCE (2018) (\$MN)

FIGURE 36 EUROPE ASSAY KITS MARKET REVENUE, BY RESEARCH NEED, (2018 V/S 2025) (\$MN)

FIGURE 37 EUROPE CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE, (2017-2025) (\$MN)

FIGURE 38 EUROPE CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION, PHARMA AND BIOTECH APPLICATION, BY PURPOSE, (2018) (\$MN)

FIGURE 39 EUROPE CELL-BASED ASSAYS SHARE, BY COUNTRY (2018 V/S 2025) (\$ MN)

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FIGURE 43 U.K. CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 44 U.K. INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN)

FIGURE 45 U.K. CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2015) (\$MN)

FIGURE 46 FRANCE CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 47 FRANCE INSTRUMENT MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN)

FIGURE 48 FRANCE CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 49 REST OF EUROPE CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 50 REST OF EUROPE INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN),

FIGURE 51 REST OF EUROPE CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 52 APAC ASSAY KIT MARKET REVENUE, BY RESEARCH NEED (2018 V/S 2025) (\$MN)

FIGURE 53 APAC CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT (2018 V/S 2025), CONSUMABLES BY PRODUCT TYPE AND CELLS BY SOURCE (2018) (\$MN)

FIGURE 54 APAC CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 55 APAC CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION, PHARMA AND BIOTECH APPLICATION, BY PURPOSE (2018) (\$MN)

FIGURE 56 APAC CELL-BASED ASSAYS MARKET REVENUE, BY COUNTRY (2018 V/S 2025) (\$MN)

FIGURE 57 CHINA CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 58 CHINA CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 59 CHINA CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 60 JAPAN CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 61 JAPAN CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 62 JAPAN CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 63 INDIA CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 64 INDIA CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN)

FIGURE 65 INDIA CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2015) (\$MN)

FIGURE 66 REST OF APAC CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 67 REST OF APAC CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 68 REST OF APAC CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 69 ROW CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT (2018 V/S 2025), CONSUMABLES, BY PRODUCT TYPE AND CELLS, BY SOURCE (2018)(\$MN)

FIGURE 70 ROW ASSAY KITS MARKET REVENUE, BY RESEARCH NEED (2018 V/S 2025) (\$MN)

FIGURE 71 ROW CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN)

FIGURE 72 ROW CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION, PHARMA AND BIOTECH APPLICATION, BY PURPOSE (2018) (\$MN)

FIGURE 73 ROW CELL-BASED ASSAYS MARKET REVENUE, BY COUNTRY (2018 V/S 2025) (\$MN)

FIGURE 74 BRAZIL CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT CONSUMABLES MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 75 BRAZIL CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 76 BRAZIL CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 77 REST OF LATAM CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES MARKET REVENUE BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 78 REST OF LATAM CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY TYPE (2018 V/S 2025) (\$MN)

FIGURE 79 REST OF LATAM CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 80 MIDDLE EAST AND OTHERS CELL-BASED ASSAYS MARKET REVENUE, BY PRODUCT, CONSUMABLES, BY PRODUCT TYPE (2018 V/S 2025) (\$MN)

FIGURE 81 MIDDLE EAST AND OTHERS CELL-BASED ASSAYS INSTRUMENTS MARKET REVENUE, BY PRODUCT TYPE (2018 V/S 2015) (\$MN)

FIGURE 82 MIDDLE EAST AND OTHERS CELL-BASED ASSAYS MARKET REVENUE, BY APPLICATION (2018 V/S 2025) (\$MN)

FIGURE 83 KEY GROWTH STRATEGIES (2017-2019)

FIGURE 84 OVERVIEW: BECTON, DICKINSON AND COMPANY

FIGURE 85 SWOT: BECTON, DICKINSON AND COMPANY

FIGURE 86 OVERVIEW: BIO-RAD LABORATORIES

FIGURE 87 SWOT: BIO-RAD LABORATORIES

FIGURE 88 SWOT: BIOTEK INSTRUMENTS, INC

FIGURE 89 OVERVIEW: CORNING, INC

FIGURE 90 SWOT: CORNING, INC

FIGURE 91 OVERVIEW: DANAHER CORPORATION

FIGURE 92 SWOT: DANAHER CORPORATION

FIGURE 93 OVERVIEW: LONZA GROUP LTD

FIGURE 94 SWOT: LONZA GROUP LTD.

FIGURE 95 OVERVIEW: MERCK KGAA

FIGURE 96 SWOT: MERCK KGAA

FIGURE 97 OVERVIEW: PERKINELMER, INC.

FIGURE 98 SWOT: PERKINELMER, INC.

FIGURE 99 OVERVIEW: TECAN TRADING AG

FIGURE 100 SWOT: TECAN

FIGURE 101 OVERVIEW: THERMO FISHER SCIENTIFIC

FIGURE 102 SWOT: THERMO FISHER SCIENTIFIC

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