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Immunohistochemistry Market Assessment, By Product [Reagents, Equipment, Antibodies, Kits], By Applications [Diagnostic, Research, Forensic], By End-users [Hospitals and Diagnostic Laboratories, Academic and Research Institutes, Others], By Region, Opportunities and Forecast, 2017-2031F

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Abstracts

Global immunohistochemistry market size was valued at USD 3.01 billion in 2023, which is expected to reach USD 4.99 billion in 2031, with a CAGR of 6.51% for the forecast period between 2024 and 2031F. The growth of the global immunohistochemistry market is driven by rising cancer rates, technological progress, expanding research endeavors, the surge in personalized medicine demand, increased healthcare spending, and the necessity for precise diagnostic instruments.

The growth of the global immunohistochemistry market hinges on a multitude of pivotal factors driving its upward momentum. Initially, the surging prevalence of global cancer cases serves as a primary catalyst. Immunohistochemistry's pivotal role in identifying specific cancer markers in tissues has become indispensable in diagnosing, prognosing, and selecting treatments, thereby significantly boosting its demand in the global immunohistochemistry market, particularly within oncology. Simultaneously, the landscape of technological advancements has profoundly transformed immunohistochemistry methodologies, elevating their precision, sensitivity, and ability to handle multiple markers concurrently. The progression has widened the array of applications, fostering its adoption across diverse research and clinical fields.

Furthermore, the burgeoning interest in personalized medicine and the substantial investments in this realm have fueled the need for accurate, tailored diagnostic

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approaches. Immunohistochemistry's capacity to provide personalized insights into disease pathology seamlessly aligns with the paradigm shift toward individualized patient care. Moreover, the substantial rise in healthcare expenditure, notably in diagnostic technologies, has provided robust support for expanding the global immunohistochemistry market. The imperative demand for dependable diagnostic tools across varied medical domains further solidifies the sustained growth of global immunohistochemistry market.

Rising Cancer Rates

The expansion of the global immunohistochemistry market stems from the worldwide increase in cancer rates. With the surge in cancer cases, there's an amplified necessity for precise diagnostic tools. Immunohistochemistry stands out for its capability to pinpoint proteins and biomarkers within tissues, which is critical in diagnosing, prognosing, and selecting treatments for cancer. Technology allows for the accurate identification and characterization of cancerous cells, assisting medical professionals in comprehending tumor behavior and devising customized treatment plans. The growing demand for efficient, personalized cancer therapies has led to a wider adoption of immunohistochemistry techniques. Its capacity to offer intricate insights into various tumor types and molecular compositions has solidified its indispensable status in oncology. Consequently, the ongoing escalation of cancer incidence is a pivotal driver fueling the continual growth and expansion of the global immunohistochemistry market.

Technological Advancements

Technological progress is the primary driver behind expanding the global immunohistochemistry market. Advancements in this arena have transformed methodologies, boosting precision, sensitivity, and the ability to handle multiple markers simultaneously. These developments expand the range of applications for immunohistochemistry, fostering its use across various research and clinical fields. Evolution allows for the precise detection and characterization of specific proteins and biomarkers in tissues, crucial for precise diagnosis, prognosis, and treatment decisions. Consequently, the ongoing innovation and enhancement of technology significantly contribute to the market's growth by enhancing effectiveness, dependability, and the breadth of insights provided by immunohistochemistry methods.

Launched in September 2023, SignalStar Multiplex IHC technology is a game-changing new tool for spatial biology research using mid-plex, high-throughput immunohistochemistry (IHC) assays. Cell Signalling Technology (CST) is a life science

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discovery technology company and a leading provider of antibodies, kits, and services. Using flexible, thoroughly validated antibody panels, the SignalStar method concurrently identifies up to eight targets in formalin-fixed, paraffin-embedded (FFPE) tissues, enabling the investigation of cellular presence, location, function, and biomarker coexpression patterns.

IHC for Cancer Treatment

The increasing need for immunohistochemistry in treating cancer is a crucial driver for the global immunohistochemistry market. Its essential function involves accurately diagnosing cancer, predicting outcomes, and guiding treatment choices. Immunohistochemistry assists in customizing treatment plans by identifying precise proteins and biomarkers in tissues. As personalized medicine gains traction, the technology's role in providing intricate details about tumor features becomes more vital. The growing dependence on immunohistochemistry in cancer management fuels its acceptance, propelling market expansion as healthcare systems globally emphasize precise and individualized methods to address the complexities associated with cancer.

Leica Biosystems announced on April 20, 2023, that the BOND MMR Antibody Panel has received US Food and Drug Administration (FDA) 510(k) clearance. The clearance gives customers an excellent option for IHC Mismatch Repair (MMR) when screening patients with colorectal cancer for the presence of probable Lynch syndrome. The Leica Biosystems BOND MMR panel on the BOND-III allows pathologists to analyze the state of mismatch repair proteins quickly and accurately in about 2.5 hours. Clinicians can feel more confident in their MMR results with the panel.

Dominance of Antibody Products

The dominance of antibody products in the global immunohistochemistry market is a crucial catalyst. Antibodies are pivotal in these assays, selectively binding to target proteins and facilitating their detection in tissue samples. The market's expansion is driven by the growing utilization of antibodies in research and diagnostic contexts. Their precision and sensitivity render them essential in pinpointing disease markers, crucial for precise diagnoses and treatment planning. With the increasing demand for accurate detection techniques, the indispensable nature of antibody products consistently propels the growth of the global immunohistochemistry market.

The global antibody manufacturing company GeneTex stated in June 2023 that it will use its platform for producing recombinant monoclonal antibodies to provide best-in-

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class biomedical research reagents. The specificity of these novel antibodies is established through rigorous internal validation testing based on knockdown/knockout approaches supplemented by additional strategies. Using the procedure, GeneTex created and validated a new recombinant rabbit monoclonal antibody for immunohistochemistry (IHC) called programmed death-ligand 1 (PD-L1).

Future Market Scenario

The prospects for the global immunohistochemistry market are positive and positioned for substantial expansion. Several factors underpin the positive forecast. Ongoing technological advancements consistently improve the precision, sensitivity, and multiplexing capabilities of immunohistochemistry methods, broadening their use in various research and clinical realms. Also, the increasing prevalence of global diseases, particularly cancer, intensifies the need for accurate diagnostic tools, emphasizing the vital role of immunohistochemistry in identifying specific disease markers in tissues.

Furthermore, the growing emphasis on personalized medicine encourages the adoption of immunohistochemistry for its ability to offer intricate insights into personalized disease attributes, aligning well with the trend toward individualized patient care. Continued governmental support, augmented investments in healthcare infrastructure, and the indispensable nature of antibody products in the sector collectively signal a promising future for the global immunohistochemistry market, ensuring sustained growth and innovative strides in diagnostics and tailored healthcare solutions.

Key Players Landscape and Outlook

Major participants in the global immunohistochemistry market are proactively seeking strategic alliances to propel progress and creativity. These partnerships encompass teaming up with research organizations, healthcare entities, and tech companies to augment research initiatives and broaden market influence. Collaborative ventures and alliances provide access to diverse expertise, technologies, and resources, nurturing the advancement of sophisticated immunohistochemistry solutions. Such partnerships further enable market entry, empowering companies to harness collective capabilities, innovate new uses, and introduce enhanced diagnostic instruments. The concerted effort amplifies their competitive advantage and fortifies the market's growth and evolution by delivering improved offerings. Agilent Technologies, Inc. and Akoya Biosciences, Inc. announced a collaboration in January 2023 to develop multiplex-immunohistochemistry diagnostic solutions for tissue analysis and to market workflow solutions for multiplex assays in the clinical research market. One end-to-end

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commercial workflow includes reagents, staining, imaging, and analysis created by integrating Agilent's Dako Omnis (autostaining instrument) and Akoya's PhenoImager HT (imaging platform) for multiplex chromogenic immunohistochemistry (mIHC) and immunofluorescent (mIF) assays.

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