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Cell-based Assays Market by Product & Service (Reagents, Microplate, Cell Lines, Assay Kits, Instrument & Software, Services), Application (Drug Discovery, Research), End User (CROs, Pharmaceutical Companies, Research Institutes) - Global Forecast to 2025

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Abstracts

The cell-based assays market is projected to reach USD 22.0 billion by 2025 from USD 14.9 billion in 2020, at a CAGR of 8.1% during the forecast period. The growing preference for cell-based assays in drug discovery, increasing funding for cell-based research, and growth in the number of drug discovery activities are the key factors supporting the growth of the market.

“By product and service, the consumables segment accounted for the largest share of the cell-based assays market”

The cell-based assays market is categorized into major three product and service categories, consuambles, instrumenet & software and services. Consumables dominated the market in 2019. The large share of this segment can be attributed to the extensive use and repeated purchase of consumables by pharmaceutical and biopharmaceutical companies and the rising number of preliminary studies for the development of therapeutics.

“Asia Pacific: The fastest-growing region in the cell-based assays market.”

The Asia Pacific market is projected to grow at the highest CAGR during the forecast period, mainly due to the government initiatives to increase funding in

biopharmaceuticals, growing R&D spending, and partnerships for life science research.

“North America: the largest share of the cell-based assays market”

North America accounted for the largest share of the cell-based assays market. Factors such as the to the availability of government and private funding for life science research, the growing penetration of CROs, comprehensive drug development regulations, and the rapid adoption of advanced technologies in the region are the major factors driving the market growth.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Respondent– Supply Side- 70%, Demand Side- 30%

By Designation— Executives- 25%, CXOs, Directors- 20%, Managers - 55%

By Region— North America - 50%, Europe - 20%, APAC – 20%, LATAM- 5%, MEA- 5%

The cell-based assays market is dominated by a few globally established players such as Becton, Dickinson and Company (US), Cell Signaling Technology, Inc. (US), Danaher Corporation (US), Merck KGaA (Germany), Thermo Fisher Scientific, Inc. (US), PerkinElmer, Inc. (US), Promega Corporation (US), Charles River Laboratories (US), Lonza (Switzerland), BioAgilytix Labs (US), Reaction Biology Corporation (US), AAT Bioquest (US), IBR Inc. (Switzerland), PBL Assay Science (US), Eurofins (US), InvivoGen (US), TopoGEN, Inc. (US), Ca3 Bioscience (Neuromics) (US), Cell Biolabs, Inc. (US), Carna Biosciences, Inc. (Japan), Dojindo Molecular Technologies, Inc. (US), Enzo Life Sciences, Inc. (US), BPS Bioscience, Inc. (US), SGS SA (Switzerland), and MLM Medical Laboratories (MD Biosciences) (US).

Research Coverage:

The report segments the cell-based assays market based on region (North America, Europe, Asia Pacific, Latin America and Middle East & Africa), Consumables

(Reagents, Assay Kits (Reporter Gene Assays, Second Messenger Assays, Cell Growth Assays, Cell Death Assays, Other Assay Kits), Cell Lines (Immortalized Cell Lines, Primary Cell Lines, Stem Cell Lines), Microplates, Probes & Labels, Other Consumables), Instruments & Software, Services, Application (Drug Discovery (Pharmacodynamic Studies, Pharmacokinetic Studies, Toxicity Studies), Basic Research and Other Application), End users (Pharmaceutical & Biopharmaceutical Companies, CROs, and Academic & Research Institutes).

The report also provides a comprehensive review of market drivers, challenges, and opportunities in the cell-based assays market

Key Benefits of Buying the Report:

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the cell-based assays market and provides them information on key market drivers, challenges, and opportunities

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(Business overview, Products offered, Recent developments, SWOT analysis, MNM view)*

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*Business overview, Products offered, Recent developments, SWOT analysis, MNM view might not be captured in case of unlisted companies.

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About

The bottom-up approach was implemented for arriving at the overall market size of the cell-based assays market, based on the market size of major product submarkets such as consumables, instruments, software, and services. Similarly the overall consumables and instruments market was derived by summing up the market sizes of different types of consumables and instruments. Further, the total software and services market (which was validated using the top-down approach) was added to the total consumables and instruments market to derive the overall market size of cell-based assays market.

This overall market size was used in the top-down procedure to estimate the market sizes of all other individual market segments and subsegments by product, application, end user, and geography using percentage splits from secondary and primary research. The market sizes of different products submarkets obtained by the bottom-up approach were validated by the top-down approach. Thus, using a combination of top-down and bottom-up approaches, the overall cell-based assay market size was arrived at.

Cell-based assays have an edge over in vitro biochemical assays in several aspects. Cell-based assays are believed to provide more precise, tissue-specific responses in a biologically relevant microenvironment, in comparison with biochemical assays. The drug responses in biochemical assays may not resemble the drug responses in a cellular context. Moreover, it is not possible to prepare or purify every target for biochemical measurement, thereby restricting the applications of biochemical assays. Owing to this, pharmaceutical and biotechnology companies are eventually replacing biochemical assays with cell-based assays in lead identification and optimization processes of drug discovery.

Although cell-based assays cannot fully replace animal testing, early phase toxicity screening has been definitely considered to be in the realm of cell-based assays. Conventional methods of toxicity and drug safety assessment involved animal testing which is expensive, time-consuming, and low-throughput. Additionally, animal model studies are faced with ethical issues, lack of interaction mechanism, and often fail to extrapolate to human drug responses.

Cell-based assays enable relatively inexpensive cytotoxicity studies which provide an early evidence of toxicity attributes of a potential drug candidate. Recent efforts are directed toward reducing the number of animal tests using high throughput cell-based assays which not only increase drug screening efficiency but also fasten the drug discovery process.

Thus, cell-based assays present a preferable alternative for biochemical assays and animals as a result of their physiological relevance, inherent virtues, and ability to provide efficient, cost-effective, and accelerated drug discovery solutions.

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