

Digital PCR Market / Digital PCR (dPCR) and Real-time PCR (qPCR) Market Size, Share & Trends by Offering (Product (Reagents & Consumables, Instrument), Software, Services), Application (Clinical (infectious, Oncology), Research, Forensic, Environmental) - Global Forecast to 2029

<https://marketpublishers.com/r/D913F0DD7F0DEN.html>

Date: July 2024

Pages: 599

Price: US\$ 3,217.50 (Single User License)

ID: D913F0DD7F0DEN

Abstracts

The global digital PCR (dPCR) and real-time PCR (qPCR) market is projected to reach USD 14.8 billion by 2029 from USD 10.0 billion in 2024, at a CAGR of 8.1% during the forecast period of 2024 to 2029. The growth of the Digital PCR (dPCR) and real-time PCR (qPCR) market has been significantly driven by its increasing adoption among hospital and diagnostics laboratories for disease diagnosis application, increasing R&D investment by key players for the development and launch of innovative product and continuous advancements in PCR technologies. However, high instrument costs especially that of dPCR and the technical limitations of PCR are restraining market growth.

“The infectious disease testing segment under clinical application segment accounted for the largest share by application in 2023.”

In 2023, the infectious disease testing segment under clinical application segment accounted for the largest share by application in the global digital PCR (dPCR) and real-time PCR (qPCR) market. qPCR has revolutionized infectious disease diagnostics by providing rapid, sensitive, and specific detection of pathogens. It is useful in identifying bacteria, viruses, fungi, and parasites, enabling early diagnosis and effective treatment. During the past decade, clinical laboratories worldwide have been increasing using qPCR for pathogen testing and the diagnosis of infectious and sexually transmitted

diseases. Advanced molecular diagnosis tools such as spectroscopy and liquid chromatography are being integrated with qPCR workflows to offer genomic lab technicians the capability of rapid and accurate pathogen detection.

“The US has continued to dominate the digital PCR (dPCR) and real-time PCR (qPCR) market during the forecast period of 2024-2029.”

The US is the world’s largest biopharmaceutical market and a leader in biopharmaceutical research/investments. The demand for digital PCR (dPCR) and real-time PCR (qPCR) products is expected to grow in the coming years, driven by the rising patient population suffering from infectious disease, increasing focus on biopharmaceuticals, and the need for safe & high-quality products in the healthcare industry. The nation has a highly advanced market in terms of R&D due to the presence of better infrastructure, government support, and private funding. This helps develop innovative and advanced technologies for research. Pharmaceutical companies in the US are actively participating in the development of novel reagent and test assays and utilizing it with Digital PCR (dPCR) and real-time PCR (qPCR), which offers less turnaround time, and is energy-efficient also provide accurate results, with in a span of time. These factors are supporting the growth of the Digital PCR (dPCR) and real-time PCR (qPCR) market in the country.

The primary interviews conducted for this report can be categorized as follows:

By Respondent: Supply Side- 70% and Demand Side 30%

By Designation: Managers - 45%, CXO & Directors - 30%, and Executives - 25%

By Region: North America -40%, Europe -25%, Asia-Pacific -25%, Latin America -5% and Middle East & Africa- 5%

List of Companies Profiled in the Report:

Danaher Corporation (US)

F. Hoffmann-La Roche Ltd (Switzerland)

Thermo Fisher Scientific Inc. (US)

Merck KGaA (Germany)

Qiagen N.V. (Germany)

Abbott Laboratories (US)

Biomerieux (France)

Becton, Dickinson and Company (US)

Agilent Technologies, Inc. (US)

Eppendorf AG (Germany)

Bio-Rad Laboratories, Inc. (US)

Takara Bio Inc. (Japan)

Promega Corporation (US)

Meridian Bioscience, Inc. (US)

ENDRESS+HAUSER (Switzerland)

QuidelOrtho Corporation (US)

Lepu Medical Technology Beijing Co Ltd. (China)

Sysmax Corporation (Japan)

Enzo Biochem, Inc. (US)

Biocartis (Belgium)

Stilla Technologies (France)

Antylia Scientific (US)

Bioneer Corporation (South Korea)

Standard BioTools (US)

Seegene Inc. (South Korea)

GenScript (US)

LGC Bioresearch Technologies (England)

Quantabio (US)

Randox Laboratories Ltd. (UK)

New England Biolabs. (US)

PCR Biosystems (UK)

Research Coverage:

This research report categorizes the digital PCR (dPCR) and real-time PCR (qPCR) market by offering ((QPCR product (QPCR Reagents and Consumables, QPCR Instruments), QPCR Software, and QPCR Services) DPCR Product (QPCR Reagents and Consumables, QPCR Instruments (Droplet Digital PCR, Chip Based Digital PCR, and Beaming Digital PCR), DPCR Software, and DPCR Services)), by applications ((QPCR Application (Clinical Application (Infectious Disease Testing, Oncology Testing, Blood Screening, Transplant Diagnostics, and Other Clinical Application), Research Application (Single Cell Analysis, Stem Cell Research, Gene Expression, and Other Research Application), Forensic Application, Environmental Applications, and Other Application), and (DPCR Application (Clinical Application (Infectious Disease Testing, Oncology Testing, Blood Screening, Transplant Diagnostics, and Other Clinical Application), Research Application (Single Cell Analysis, Stem Cell Research, Gene Expression, and Other Research Application), Forensic Application, Environmental Applications, and Other Application)), by end user ((QPCR End User (Hospitals and Diagnostic Laboratories, Academic and Research Institutes, Pharmaceutical and Biotechnology Companies, CROs and CDMOs, Forensic Laboratories, and Others), and (DPCR End User (Hospitals and Diagnostic Laboratories, Academic and Research Institutes, Pharmaceutical and Biotechnology Companies, CROs and CDMOs, Forensic Laboratories, and Others))) and by region (North America, Europe, Asia Pacific, Latin

America, Middle East and Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the Digital PCR (dPCR) and real-time PCR (qPCR) market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, solutions, key strategies, collaborations, partnerships, and agreements. New launches, collaborations and acquisitions, and recent developments associated with the Digital PCR (dPCR) and real-time PCR (qPCR) market.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall digital PCR (dPCR) and real-time PCR (qPCR) market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (Rising incidence and prevalence of target infectious diseases and genetic disorders, Continuous advancements in PCR technologies, The role of PCR in biomarker discovery, Increased use of dPCR and qPCR technologies for point of care (POC) diagnostics), restraints (High device costs associated with dPCR, Technical limitations of qPCR and dPCR, Unfavorable reimbursement scenario for diagnostic companies), opportunities (Growing market penetration in emerging countries, Integration of qPCR and dPCR with Next-Generation Sequencing (NGS), Growing significance of RT-PCR based companion diagnostics in drug development process), and Challenges (Time Consuming methodology involving in sample handling and post-PCR analysis, Lack of accuracy & standardization in protocol, Availability of alternative technologies for disease diagnosis) influencing the growth of the market).

Product Development/Innovation: Detailed insights on newly launched products of the digital PCR (dPCR) and real-time PCR (qPCR) market

Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the digital PCR (dPCR) and real-time PCR (qPCR) market

Competitive Assessment: Danaher Corporation (US), F. Hoffmann-La Roche Ltd (Switzerland), Thermo Fisher Scientific Inc. (US), Merck KGaA (Germany), Qiagen N.V. (Germany), Abbott Laboratories (US), Biomerieux (France), Becton, Dickinson and Company (US), Agilent Technologies, Inc. (US), Eppendorf AG (Germany), Bio-Rad Laboratories, Inc. (US), Takara Bio Inc. (Japan), among others in the market.

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