

# Digital PCR (dPCR) and Real-time PCR (qPCR) Market by Product (Instruments, Reagents & Consumables, Software & Services), Application (Clinical, Research, Forensic), End User (Hospital, Diagnostic Labs, Pharma, Biotech, CROs) - Global Forecast to 2028

<https://marketpublishers.com/r/DF75F3F1CA7EN.html>

Date: April 2023

Pages: 470

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

ID: DF75F3F1CA7EN

## Abstracts

The global Digital PCR and Real-time PCR Market is consolidated market. The market is estimated to grow to USD 12.4 billion by 2028 from USD 8.5 billion in 2023, at a CAGR of 7.8%. The growth of this market is due to factors such as the rising infectious diseases and genetic disorders, continuous advancements in PCR technologies, and increasing investments. However, high instrument costs—especially that of dPCR—and the technical limitations of PCR are restraining market growth.

“By product & service, the consumables & reagent segment is expected to grow at the highest during the forecast period.”

On the basis of product & service, the dPCR and qPCR market is segmented into reagents and consumables; instruments; and software and services. This segment includes specific reagents (such as master mixes, assay kits, and enzymes) and consumables (such as reaction tubes, needles, and vials) used during dPCR procedures. Generally, dPCR reagents consist of a super mix or a master mix that contains the buffer, DNA polymerase, dNTPs, and dsDNA-binding dyes. The reagents and consumables segment is expected to witness the highest growth during the forecast period. The dPCR and qPCR products are increasingly used by researchers and healthcare professionals due to the ongoing automation and miniaturization of qPCR/dPCR instruments, the commercialization of advanced software, and the availability of customized laboratory reagents such factors are expected to drive the growth of the qPCR and dPCR reagents and consumables market.

“By application, the clinical applications segment is expected to grow at the highest CAGR during the forecast period.”

The clinical applications segment is estimated to dominate the qPCR and dPCR applications market during the forecast period. The key factors driving the market growth include the growing usage of qPCR in disease diagnosis, growing public emphasis on early & effective disease diagnosis & treatment, technological benefits offered by dPCR such as high flexibility, increased device sensitivity, better precision, and absolute quantification of target molecule, and the increasing global burden of cancer are key factors that will drive the market for clinical applications during the forecast period.

“By end-user, the hospitals and diagnostics centers segment dominated the market during the forecast period.”

The hospital and diagnostic laboratories dominated the Digital PCR and Real-time PCR Market during the forecast period. This can be attributed to the increasing market availability of qPCR reagents for clinical diagnostic applications, the ongoing expansion of healthcare infrastructure across emerging countries, the high prevalence of target diseases, and growing awareness among end users related to the benefits offered by qPCR for clinical diagnosis, the growing demand for early and efficient disease diagnosis and treatment, and the increasing number of dPCR product launches for diagnostic applications.

“Asia Pacific dPCR and qPCR market is expected to witness the highest growth during the forecast period.”

The Asia Pacific market is estimated to grow at the highest CAGR during the forecast period primarily due to the ongoing expansion and modernization of the healthcare infrastructure in emerging Asian countries, increasing number of research projects in China, India, and Japan in the field of genomics and oncology, rising trend of clinical research being outsourced to Asia-based CROs by leading drug manufacturing companies, and continuous government support for genomics-based research activities in emerging Asia Pacific countries.

A breakdown of the primary participants referred to for this report is provided below:

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

By Designation: Managers—45%, CXOs and Directors – 30%, and Executives - 25%

By Region: North America—40%, Europe—25%, Asia Pacific—20%, RoW-15%

Prominent players in the global digital PCR (dPCR) and real-time PCR (qPCR) market are, Thermo Fisher Scientific Inc. (US), Bio-Rad Laboratories, Inc. (US), F. Hoffmann-La Roche Ltd. (Switzerland), Abbott Laboratories (US), Agilent Technologies, Inc. (US), Becton, Dickinson and Company (US), Takara Bio Inc. (Japan), Danaher Corporation (US), Eppendorf (Germany), Promega Corporation (US), Merck KGaA (Germany), QIAGEN (Germany), BioMérieux (France), Meridian Bioscience (US), Quidel Corporation (US), Enzo Biochem, Inc. (US), Stilla (France), Standard BioTools (US), ENDRESS+HAUSER Group Services AG (ENDRESS+HAUSER) (Switzerland), JN Medsys (Singapore), BIONEER CORPORATION (South Korea), ELITech Group (France), QuantaBio (US), Sacace Biotechnologies Srl (Italy), Bio Molecular Systems (Australia), Biomeme, Inc. (US), Kyratec (Australia), LGC Bioresearch Technologies (England), Antylia Scientific (US), and Genome Diagnostics Pvt. Ltd. (India).

#### Research Coverage:

The report analyzes the dPCR and qPCR market and aims at estimating the market size and future growth potential. The report also includes an in-depth competitive analysis of the key players in this market, along with their company profiles, product offerings, and recent developments.

#### Reasons to Buy the Report

The report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a more significant share. Firms purchasing the report could use one, or a combination of the below mentioned five strategies for strengthening their market presence.

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, growing importance of PCR in biomarker discovery), restraints (High device

costs associated with dPCR, technical limitations of qPCR and dPCR ), opportunities (Growing market penetration in emerging countries), and challenges (Time-consuming methodology involving sample handling and post-PCR analysis, Lack of accuracy and standardization in protocols) influencing the growth of the Digital PCR and Real-time PCR Market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Digital PCR and Real-time PCR Market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the Digital PCR and Real-time PCR Market across varied regions

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Digital PCR and Real-time PCR market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies and service offerings of leading players like Thermo Fisher Scientific Inc. (US), Bio-Rad Laboratories, Inc. (US), F. Hoffmann-La Roche Ltd. (Switzerland), Abbott Laboratories (US), Agilent Technologies, Inc. (US), Becton, Dickinson and Company (US), Takara Bio Inc. (Japan), and Danaher Corporation (US).

## Contents

### 1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
  - 1.2.1 INCLUSIONS & EXCLUSIONS
- 1.3 STUDY SCOPE
  - 1.3.1 MARKETS COVERED
  - 1.3.2 YEARS CONSIDERED
- 1.4 CURRENCY
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS
- 1.7 SUMMARY OF CHANGES
  - 1.7.1 RECESSION IMPACT

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH APPROACH
  - FIGURE 1 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: RESEARCH DESIGN
    - 2.1.1 SECONDARY RESEARCH
    - 2.1.2 PRIMARY RESEARCH
  - FIGURE 2 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: BREAKDOWN OF PRIMARIES
- 2.2 MARKET SIZE ESTIMATION
  - FIGURE 3 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET SIZE ESTIMATION: SUPPLY-SIDE ANALYSIS (2022)
  - FIGURE 4 MARKET SIZE ESTIMATION: APPROACH 1 – REVENUE SHARE ANALYSIS (2022)
  - FIGURE 5 ILLUSTRATIVE EXAMPLE OF QIAGEN: REVENUE SHARE ANALYSIS (2022)
    - 2.2.1 KEY INDUSTRY INSIGHTS
- 2.3 GROWTH FORECAST
  - FIGURE 6 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: CAGR PROJECTIONS, 2023–2028
  - FIGURE 7 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: GROWTH ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES
- 2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

## FIGURE 8 DATA TRIANGULATION METHODOLOGY

2.5 RESEARCH ASSUMPTIONS

2.6 RISK ANALYSIS

2.7 RECESSION IMPACT

TABLE 1 GLOBAL INFLATION RATE PROJECTIONS, 2021–2027 (% GROWTH)

TABLE 2 US HEALTH EXPENDITURE, 2019–2022 (USD MILLION)

TABLE 3 US HEALTH EXPENDITURE, 2023–2027 (USD MILLION)

## 3 EXECUTIVE SUMMARY

FIGURE 9 GLOBAL REAL-TIME PCR PRODUCTS & SERVICES MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 10 GLOBAL DIGITAL PCR PRODUCTS & SERVICES MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION)

FIGURE 11 GLOBAL REAL-TIME PCR MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)

FIGURE 12 GLOBAL DIGITAL PCR MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION)

FIGURE 13 GLOBAL REAL-TIME PCR MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)

FIGURE 14 GLOBAL DIGITAL PCR MARKET, BY END USER, 2023 VS. 2028 (USD MILLION)

FIGURE 15 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: GEOGRAPHICAL SNAPSHOT

## 4 PREMIUM INSIGHTS

4.1 GLOBAL DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET OVERVIEW

FIGURE 16 RISING INCIDENCE AND PREVALENCE OF TARGET INFECTIOUS DISEASES & GENETIC DISORDERS EXPECTED TO DRIVE MARKET GROWTH

4.2 ASIA PACIFIC: DPCR AND QPCR MARKET OVERVIEW (2022)

FIGURE 17 ONGOING EXPANSION AND MODERNIZATION OF HEALTHCARE INFRASTRUCTURE IN EMERGING ASIAN COUNTRIES TO DRIVE MARKET GROWTH

4.3 GEOGRAPHICAL SNAPSHOT OF DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET

FIGURE 18 CHINA TO WITNESS HIGHEST GROWTH DURING FORECAST PERIOD

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 19 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

#### 5.2.1 DRIVERS

5.2.1.1 Rising incidence and prevalence of target infectious diseases and genetic disorders

FIGURE 20 GLOBAL BURDEN OF HIV INFECTIONS, BY REGION, 2021

5.2.1.2 Continuous advancements in PCR technologies

FIGURE 21 TRADITIONAL PCR VS. QPCR AND DPCR

5.2.1.3 Growing importance of PCR in biomarker discovery

#### 5.2.2 RESTRAINTS

5.2.2.1 High device costs associated with dPCR

5.2.2.2 Technical limitations of qPCR and dPCR

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Growing market penetration in emerging countries

#### 5.2.4 CHALLENGES

5.2.4.1 Time-consuming methodology involving sample handling and post-PCR analysis

5.2.4.2 Lack of accuracy & standardization in protocols

### 5.3 PORTER'S FIVE FORCES ANALYSIS

#### 5.3.1 OVERVIEW

TABLE 4 IMPACT OF PORTER'S FIVE FORCES ANALYSIS ON DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET

5.3.2 INTENSITY OF COMPETITIVE RIVALRY

5.3.3 BARGAINING POWER OF SUPPLIERS

5.3.4 BARGAINING POWER OF BUYERS

5.3.5 THREAT FROM NEW ENTRANTS

5.3.6 THREAT FROM SUBSTITUTES

### 5.4 GLOBAL REGULATORY LANDSCAPE

5.4.1 KEY REGULATORY AGENCIES

### 5.5 VALUE CHAIN ANALYSIS

FIGURE 22 VALUE CHAIN ANALYSIS—MAXIMUM VALUE ADDED DURING REGULATION AND DISTRIBUTION STAGES

5.5.1 RESEARCH & DEVELOPMENT

5.5.2 EVALUATION AND ADAPTATION

5.5.3 REGULATIONS VIA NATIONAL AND INTERNATIONAL BODIES

#### 5.5.4 POST-DELIVERY SUPPORT

### 5.6 SUPPLY CHAIN ANALYSIS

#### 5.6.1 PROMINENT COMPANIES

#### 5.6.2 SMALL & MEDIUM-SIZED ENTERPRISES

#### 5.6.3 END USERS

### FIGURE 23 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: SUPPLY CHAIN ANALYSIS

### 5.7 TECHNOLOGY ANALYSIS

#### 5.7.1 DEVELOPMENT OF PORTABLE INSTRUMENTS USING PCR DIAGNOSTIC SERVICES

### 5.8 ECOSYSTEM ANALYSIS

#### TABLE 5 SUPPLY CHAIN ECOSYSTEM

### 5.9 PATENT ANALYSIS

### 5.10 PRICING ANALYSIS

#### TABLE 6 AVERAGE PRICE RANGE OF PCR PRODUCTS, BY KEY PLAYERS (USD)

### 5.11 TRADE ANALYSIS

#### TABLE 7 IMPORT DATA FOR PCR ANALYZERS (HS CODE 3822), BY COUNTRY, 2017–2021 (USD)

#### TABLE 8 EXPORT DATA FOR PCR ANALYZERS (HS CODE 3822), BY COUNTRY, 2017–2021 (USD)

### 5.12 KEY CONFERENCES AND EVENTS (2023)

#### TABLE 9 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET: LIST OF MAJOR CONFERENCES AND EVENTS

### 5.13 KEY STAKEHOLDERS AND BUYING CRITERIA

#### 5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS, BY END USER

#### TABLE 10 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY END USER (%)

#### 5.13.2 BUYING CRITERIA

#### FIGURE 24 KEY BUYING CRITERIA, BY END USER

## **6 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET, BY PRODUCT & SERVICE**

### 6.1 INTRODUCTION

#### TABLE 11 DPCR AND QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

### 6.2 QPCR

#### TABLE 12 QPCR PRODUCTS & SERVICES MARKET, BY REGION, 2021–2028 (USD MILLION)



TABLE 13 NORTH AMERICA: QPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 14 EUROPE: QPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 15 ASIA PACIFIC: QPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 16 LATIN AMERICA: QPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 17 QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

#### 6.2.1 QPCR REAGENTS AND CONSUMABLES

6.2.1.1 Rise in probe-based multiplex genetic analysis procedures to drive qPCR reagents and consumables market

TABLE 18 QPCR REAGENTS AND CONSUMABLES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 19 NORTH AMERICA: QPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 20 EUROPE: QPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 21 ASIA PACIFIC: QPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 22 LATIN AMERICA: QPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.1.2 qPCR reagents and consumables market, by application

TABLE 23 QPCR REAGENTS AND CONSUMABLES MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

#### 6.2.1.3 qPCR reagents and consumables market, by end user

TABLE 24 QPCR REAGENTS AND CONSUMABLES MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 6.2.2 QPCR INSTRUMENTS

#### 6.2.2.1 Growing adoption of qPCR instruments to drive market

TABLE 25 QPCR INSTRUMENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 26 NORTH AMERICA: QPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 27 EUROPE: QPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 28 ASIA PACIFIC: QPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 29 LATIN AMERICA: QPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.2 qPCR instruments market, by application

TABLE 30 QPCR INSTRUMENTS MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

#### 6.2.2.3 qPCR instruments market, by end user

TABLE 31 QPCR INSTRUMENTS MARKET, BY END USER, 2021–2028 (USD MILLION)

### 6.2.3 QPCR SOFTWARE AND SERVICES

#### 6.2.3.1 Rising demand for specialized qPCR analysis software to boost market

TABLE 32 QPCR SOFTWARE AND SERVICES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 33 NORTH AMERICA: QPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 34 EUROPE: QPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 35 ASIA PACIFIC: QPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 36 LATIN AMERICA: QPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.2 qPCR software and services market, by application

TABLE 37 QPCR SOFTWARE AND SERVICES MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

#### 6.2.3.3 qPCR software and services market, by end user

TABLE 38 QPCR SOFTWARE AND SERVICES MARKET, BY END USER, 2021–2028 (USD MILLION)

## 6.3 DPCR

6.3.1 GROWING PRIVATE FUNDING FOR DEVELOPMENT AND COMMERCIALIZATION OF INNOVATIVE DPCR INSTRUMENTS TO DRIVE MARKET

TABLE 39 DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 40 DPCR PRODUCTS & SERVICES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 41 NORTH AMERICA: DPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 42 EUROPE: DPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 43 ASIA PACIFIC: DPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 44 LATIN AMERICA: DPCR PRODUCTS & SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 6.3.2 DPCR REAGENTS AND CONSUMABLES

6.3.2.1 Rising incidence of infectious disease and availability of novel dPCR reagents worldwide to drive market

TABLE 45 DPCR REAGENTS AND CONSUMABLES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 46 NORTH AMERICA: DPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 47 EUROPE: DPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 48 ASIA PACIFIC: DPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 49 LATIN AMERICA: DPCR REAGENTS AND CONSUMABLES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.3.2.2 dPCR reagents and consumables market, by application

TABLE 50 DPCR REAGENTS AND CONSUMABLES MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

6.3.2.3 dPCR reagents and consumables market, by end user

TABLE 51 DPCR REAGENTS AND CONSUMABLES MARKET, BY END USER, 2021–2028 (USD MILLION)

6.3.3 DPCR INSTRUMENTS

6.3.3.1 Rise in dPCR-based genetic research activities worldwide to drive market growth

TABLE 52 DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 53 DPCR INSTRUMENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 54 NORTH AMERICA: DPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 55 EUROPE: DPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 56 ASIA PACIFIC: DPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 57 LATIN AMERICA: DPCR INSTRUMENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.3.3.2 dPCR instruments market, by application

TABLE 58 DPCR INSTRUMENTS MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

6.3.3.3 dPCR instruments market, by end user

TABLE 59 DPCR INSTRUMENTS MARKET, BY END USER, 2021–2028 (USD MILLION)

6.3.3.4 Droplet digital PCR

6.3.3.4.1 Advantages of ddPCR to boost adoption

TABLE 60 DROPLET DIGITAL PCR MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 61 NORTH AMERICA: DROPLET DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 62 EUROPE: DROPLET DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 63 ASIA PACIFIC: DROPLET DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 64 LATIN AMERICA: DROPLET DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.3.5 Chip-based digital PCR

##### 6.3.3.5.1 Rise in genetic research activities to propel market growth

TABLE 65 CHIP-BASED DIGITAL PCR MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 66 NORTH AMERICA: CHIP-BASED DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 67 EUROPE: CHIP-BASED DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 68 ASIA PACIFIC: CHIP-BASED DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 69 LATIN AMERICA: CHIP-BASED DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.3.6 BEAMing digital PCR

6.3.3.6.1 Growing application of BEAMing digital PCR in cancer research to favor market

TABLE 70 BEAMING DIGITAL PCR MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 71 NORTH AMERICA: BEAMING DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 72 EUROPE: BEAMING DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 73 ASIA PACIFIC: BEAMING DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 74 LATIN AMERICA: BEAMING DIGITAL PCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.4 DPCR SOFTWARE AND SERVICES

##### 6.3.4.1 Easy-to-use interfaces and simplified workflows to support market growth

TABLE 75 DPCR SOFTWARE AND SERVICES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 76 NORTH AMERICA: DPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 77 EUROPE: DPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 78 ASIA PACIFIC: DPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 79 LATIN AMERICA: DPCR SOFTWARE AND SERVICES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.3.4.2 dPCR software and services market, by application

TABLE 80 DPCR SOFTWARE AND SERVICES MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

6.3.4.3 dPCR software and services market, by end user

TABLE 81 DPCR SOFTWARE AND SERVICES MARKET, BY END USER, 2021–2028 (USD MILLION)

## **7 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET, BY APPLICATION**

### 7.1 INTRODUCTION

TABLE 82 DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

### 7.2 QPCR APPLICATIONS

TABLE 83 QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

#### 7.2.1 QPCR CLINICAL APPLICATIONS

TABLE 84 QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 85 QPCR CLINICAL APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 86 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 87 EUROPE: QPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 88 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 89 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1.1 Infectious disease testing

7.2.1.1.1 Wide availability of qPCR assays and kits for infectious disease testing to drive market

TABLE 90 QPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY REGION, 2021–2028 (USD MILLION)

TABLE 91 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 92 EUROPE: QPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 93 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 94 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1.2 Oncology testing

7.2.1.2.1 Growing use of qPCR techniques in tumor profiling to aid growth

TABLE 95 QPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY REGION, 2021–2028 (USD MILLION)

TABLE 96 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 97 EUROPE: QPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 98 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 99 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1.3 Blood screening

7.2.1.3.1 Elimination of post-amplification processing and easy process automation to boost growth

TABLE 100 QPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY REGION, 2021–2028 (USD MILLION)

TABLE 101 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 102 EUROPE: QPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 103 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 104 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1.4 Transplant diagnostics

7.2.1.4.1 Increasing commercialization of qPCR products for transplant diagnostics to drive growth

TABLE 105 QPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY REGION, 2021–2028 (USD MILLION)

TABLE 106 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR

TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 107 EUROPE: QPCR CLINICAL APPLICATIONS MARKET FOR

TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 108 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET FOR

TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 109 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR

TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1.5 Other clinical applications

TABLE 110 QPCR MARKET FOR OTHER CLINICAL APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 111 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 112 EUROPE: QPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 113 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 114 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.2.2 RESEARCH APPLICATIONS

#### 7.2.2.1 Growing genome-based research activity to boost market growth

TABLE 115 QPCR RESEARCH APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 116 NORTH AMERICA: QPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 117 EUROPE: QPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 118 ASIA PACIFIC: QPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 119 LATIN AMERICA: QPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.2.3 FORENSIC APPLICATIONS

7.2.3.1 Growing crime rates and increasing application of genomic analysis in criminology & forensics to fuel growth

TABLE 120 QPCR FORENSIC APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 121 NORTH AMERICA: QPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 122 EUROPE: QPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 123 ASIA PACIFIC: QPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 124 LATIN AMERICA: QPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.4 ENVIRONMENTAL APPLICATIONS

7.2.4.1 Growing use of qPCR in environmental microbiology to drive market

TABLE 125 QPCR ENVIRONMENTAL APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 126 NORTH AMERICA: QPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 127 EUROPE: QPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 128 ASIA PACIFIC: QPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 129 LATIN AMERICA: QPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.5 OTHER APPLICATIONS

TABLE 130 OTHER QPCR APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 131 NORTH AMERICA: OTHER QPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 132 EUROPE: OTHER QPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 133 ASIA PACIFIC: OTHER QPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 134 LATIN AMERICA: OTHER QPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.3 DPCR APPLICATIONS

TABLE 135 DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

#### 7.3.1 CLINICAL APPLICATIONS

TABLE 136 DPCR CLINICAL APPLICATIONS MARKET, BY TYPE 2021–2028 (USD MILLION)

TABLE 137 DPCR CLINICAL APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 138 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 139 EUROPE: DPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 140 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET, BY



COUNTRY, 2021–2028 (USD MILLION)

TABLE 141 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.1.1 Infectious disease testing

7.3.1.1.1 Accuracy and precision of dPCR to boost demand in infectious disease testing

TABLE 142 DPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY REGION, 2021–2028 (USD MILLION)

TABLE 143 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 144 EUROPE: DPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 145 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 146 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR INFECTIOUS DISEASE TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.1.2 Oncology testing

7.3.1.2.1 dPCR to play vital role in oncology testing and clinical studies

TABLE 147 DPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY REGION, 2021–2028 (USD MILLION)

TABLE 148 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 149 EUROPE: DPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 150 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 151 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR ONCOLOGY TESTING, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.1.3 Blood screening

7.3.1.3.1 Multiple advantages of dPCR over traditional techniques to drive blood screening market

TABLE 152 DPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY REGION, 2021–2028 (USD MILLION)

TABLE 153 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 154 EUROPE: DPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 155 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 156 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR BLOOD SCREENING, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.1.4 Transplant diagnostics

7.3.1.4.1 Shortage of dPCR products for transplant diagnostics to limit market growth

TABLE 157 DPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY REGION, 2021–2028 (USD MILLION)

TABLE 158 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 159 EUROPE: DPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 160 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 161 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR TRANSPLANT DIAGNOSTICS, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.1.5 Other clinical applications

TABLE 162 DPCR MARKET FOR OTHER CLINICAL APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 163 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 164 EUROPE: DPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 165 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 166 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET FOR OTHER CLINICAL APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.2 RESEARCH APPLICATIONS

7.3.2.1 Wide usage of dPCR in genetic research to drive market

TABLE 167 DPCR RESEARCH APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 168 NORTH AMERICA: DPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 169 EUROPE: DPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 170 ASIA PACIFIC: DPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 171 LATIN AMERICA: DPCR RESEARCH APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

7.3.3 FORENSIC APPLICATIONS

### 7.3.3.1 Need to reduce time & cost of forensic processes to drive market growth

TABLE 172 DPCR FORENSIC APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 173 NORTH AMERICA: DPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 174 EUROPE: DPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 175 ASIA PACIFIC: DPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 176 LATIN AMERICA: DPCR FORENSIC APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.3.4 ENVIRONMENTAL APPLICATIONS

#### 7.3.4.1 Increasing adoption of dPCR for wastewater surveillance to propel growth

TABLE 177 DPCR ENVIRONMENTAL APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 178 NORTH AMERICA: DPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 179 EUROPE: DPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 180 ASIA PACIFIC: DPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 181 LATIN AMERICA: DPCR ENVIRONMENTAL APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.3.5 OTHER APPLICATIONS

TABLE 182 OTHER DPCR APPLICATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 183 NORTH AMERICA: OTHER DPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 184 EUROPE: OTHER DPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 185 ASIA PACIFIC: OTHER DPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 186 LATIN AMERICA: OTHER DPCR APPLICATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## **8 DIGITAL PCR (DPCR) AND REAL-TIME PCR (QPCR) MARKET, BY END USER**

### 8.1 INTRODUCTION

TABLE 187 QPCR END USER MARKET, BY TECHNOLOGY, 2021–2028 (USD

MILLION)

## 8.2 QPCR END USERS

TABLE 188 QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 8.2.1 HOSPITALS AND DIAGNOSTIC LABORATORIES

8.2.1.1 Increased use of qPCR for disease diagnosis to drive segmental growth

TABLE 189 QPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY REGION, 2021–2028 (USD MILLION)

TABLE 190 NORTH AMERICA: QPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 191 EUROPE: QPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 192 ASIA PACIFIC: QPCR FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 193 LATIN AMERICA: QPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.2.2 ACADEMIC AND RESEARCH INSTITUTES

8.2.2.1 Propelling use of qPCR in genetic & molecular studies likely to drive segmental growth

TABLE 194 QPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY REGION, 2021–2028 (USD MILLION)

TABLE 195 NORTH AMERICA: QPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 196 EUROPE: QPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 197 ASIA PACIFIC: QPCR FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 198 LATIN AMERICA: QPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.2.3 PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES

8.2.3.1 Adoption of digital PCR in drug discovery and development to upsurge market growth

TABLE 199 QPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY REGION, 2021–2028 (USD MILLION)

TABLE 200 NORTH AMERICA: QPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 201 EUROPE: QPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 202 ASIA PACIFIC: QPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 203 LATIN AMERICA: QPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)

#### 8.2.4 CROS AND CDMOS

8.2.4.1 Increased outsourcing of drug development services to drive market

TABLE 204 QPCR MARKET FOR CROS AND CDMOS, BY REGION, 2021–2028 (USD MILLION)

TABLE 205 NORTH AMERICA: QPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 206 EUROPE: QPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 207 ASIA PACIFIC: QPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 208 LATIN AMERICA: QPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

#### 8.2.5 FORENSIC LABORATORIES

8.2.5.1 Acceptance of qPCR-based techniques for forensic studies anticipated to increase demand

TABLE 209 QPCR MARKET FOR FORENSIC LABORATORIES, BY REGION, 2021–2028 (USD MILLION)

TABLE 210 NORTH AMERICA: QPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 211 EUROPE: QPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 212 ASIA PACIFIC: QPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 213 LATIN AMERICA: QPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

#### 8.2.6 OTHER END USERS

TABLE 214 QPCR MARKET FOR OTHER END USERS, BY REGION, 2021–2028 (USD MILLION)

TABLE 215 NORTH AMERICA: QPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 216 EUROPE: QPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 217 ASIA PACIFIC: QPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 218 LATIN AMERICA: QPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.3 DPCR END USERS

**TABLE 219 DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)****8.3.1 HOSPITALS AND DIAGNOSTIC LABORATORIES**

8.3.1.1 Increased use of digital PCR for genomic testing to drive segmental growth

**TABLE 220 DPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY REGION, 2021–2028 (USD MILLION)****TABLE 221 NORTH AMERICA: DPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 222 EUROPE: DPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, 2021–2028 (USD MILLION)****TABLE 223 ASIA PACIFIC: DPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 224 LATIN AMERICA: DPCR MARKET FOR HOSPITALS AND DIAGNOSTIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)****8.3.2 ACADEMIC AND RESEARCH INSTITUTES**

8.3.2.1 Rise in research collaborations and increased funding likely to propel segmental growth

**TABLE 225 DPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY REGION, 2021–2028 (USD MILLION)****TABLE 226 NORTH AMERICA: DPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 227 EUROPE: DPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, 2021–2028 (USD MILLION)****TABLE 228 ASIA PACIFIC: DPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 229 LATIN AMERICA: DPCR MARKET FOR ACADEMIC AND RESEARCH INSTITUTES, BY COUNTRY, 2021–2028 (USD MILLION)****8.3.3 PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES**

8.3.3.1 Increased investment in research and development to drive demand for dPCR

**TABLE 230 DPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY REGION, 2021–2028 (USD MILLION)****TABLE 231 NORTH AMERICA: DPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 232 EUROPE: DPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 233 ASIA PACIFIC: DPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)****TABLE 234 LATIN AMERICA: DPCR MARKET FOR PHARMACEUTICAL AND BIOTECHNOLOGY COMPANIES, BY COUNTRY, 2021–2028 (USD MILLION)****8.3.4 CROS AND CDMOS**

#### 8.3.4.1 Rise in clinical trials to drive market

TABLE 235 DPCR MARKET FOR CROS AND CDMOS, BY REGION, 2021–2028 (USD MILLION)

TABLE 236 NORTH AMERICA: DPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 237 EUROPE: DPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 238 ASIA PACIFIC: DPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 239 LATIN AMERICA: DPCR MARKET FOR CROS AND CDMOS, BY COUNTRY, 2021–2028 (USD MILLION)

#### 8.3.5 FORENSIC LABORATORIES

##### 8.3.5.1 Automation in forensic lab workflows likely to drive demand for dPCR

TABLE 240 DPCR MARKET FOR FORENSIC LABORATORIES, BY REGION, 2021–2028 (USD MILLION)

TABLE 241 NORTH AMERICA: DPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 242 EUROPE: DPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 243 ASIA PACIFIC: DPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 244 LATIN AMERICA: DPCR MARKET FOR FORENSIC LABORATORIES, BY COUNTRY, 2021–2028 (USD MILLION)

#### 8.3.6 OTHER END USERS

TABLE 245 DPCR MARKET FOR OTHER END USERS, BY REGION, 2021–2028 (USD MILLION)

TABLE 246 NORTH AMERICA: DPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 247 EUROPE: DPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 248 ASIA PACIFIC: DPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 249 LATIN AMERICA: DPCR MARKET FOR OTHER END USERS, BY COUNTRY, 2021–2028 (USD MILLION)

## 9 DIGITAL PCR (DPCR) & REAL-TIME PCR (QPCR) MARKET, BY REGION

### 9.1 INTRODUCTION

TABLE 250 DPCR & QPCR MARKET, BY REGION, 2021–2028 (USD MILLION)

## 9.2 NORTH AMERICA

### FIGURE 25 NORTH AMERICA: DPCR & QPCR MARKET SNAPSHOT

TABLE 251 NORTH AMERICA: DPCR & QPCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 252 NORTH AMERICA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 253 NORTH AMERICA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 254 NORTH AMERICA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 255 NORTH AMERICA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 256 NORTH AMERICA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 257 NORTH AMERICA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 258 NORTH AMERICA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 259 NORTH AMERICA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 260 NORTH AMERICA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 261 NORTH AMERICA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.2.1 US

#### 9.2.1.1 High incidence of chronic and genetic diseases to drive market

TABLE 262 US: DPCR & QPCR APPLICATIONS MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 263 US: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 264 US: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 265 US: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 266 US: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 267 US: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 268 US: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 269 US: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028



(USD MILLION)

TABLE 270 US: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 271 US: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.2.2 CANADA

9.2.2.1 Government initiatives in support of genomics research to drive market in Canada

TABLE 272 CANADA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 273 CANADA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 274 CANADA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 275 CANADA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 276 CANADA: QPCR APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 277 CANADA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 278 CANADA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 279 CANADA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 280 CANADA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 281 CANADA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.2.3 NORTH AMERICA: RECESSION IMPACT

## 9.3 EUROPE

TABLE 282 EUROPE: DPCR & QPCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 283 EUROPE: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 284 EUROPE: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 285 EUROPE: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 286 EUROPE: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 287 EUROPE: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 288 EUROPE: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE,

2021–2028 (USD MILLION)

TABLE 289 EUROPE: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 290 EUROPE: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 291 EUROPE: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 292 EUROPE: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.3.1 GERMANY

9.3.1.1 Germany to dominate European dPCR & qPCR market

TABLE 293 GERMANY: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 294 GERMANY: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 295 GERMANY: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 296 GERMANY: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 297 GERMANY: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 298 GERMANY: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 299 GERMANY: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 300 GERMANY: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 301 GERMANY: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 302 GERMANY: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.3.2 UK

9.3.2.1 Growing focus on genomics research to support market

TABLE 303 UK: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 304 UK: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 305 UK: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 306 UK: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 307 UK: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 308 UK: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028

(USD MILLION)

TABLE 309 UK: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 310 UK: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028  
(USD MILLION)

TABLE 311 UK: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 312 UK: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.3.3 FRANCE

9.3.3.1 Growing initiatives for genomic medicine to support market

TABLE 313 FRANCE: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD  
MILLION)

TABLE 314 FRANCE: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
MILLION)

TABLE 315 FRANCE: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
MILLION)

TABLE 316 FRANCE: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 317 FRANCE: QPCR MARKET, BY APPLICATION, 2021–2028 (USD  
MILLION)

TABLE 318 FRANCE: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE,  
2021–2028 (USD MILLION)

TABLE 319 FRANCE: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 320 FRANCE: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE,  
2021–2028 (USD MILLION)

TABLE 321 FRANCE: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 322 FRANCE: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

### 9.3.4 SPAIN

9.3.4.1 Increasing adoption of advanced diagnostic technologies to drive growth

TABLE 323 SPAIN: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD  
MILLION)

TABLE 324 SPAIN: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
MILLION)

TABLE 325 SPAIN: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
MILLION)

TABLE 326 SPAIN: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 327 SPAIN: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 328 SPAIN: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028  
(USD MILLION)

TABLE 329 SPAIN: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 330 SPAIN: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 331 SPAIN: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 332 SPAIN: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.3.5 ITALY

##### 9.3.5.1 Rising incidence of target diseases to drive market in Italy

TABLE 333 ITALY: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 334 ITALY: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 335 ITALY: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 336 ITALY: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 337 ITALY: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 338 ITALY: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 339 ITALY: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 340 ITALY: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 341 ITALY: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 342 ITALY: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.3.6 REST OF EUROPE

TABLE 343 REST OF EUROPE: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 344 REST OF EUROPE: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 345 REST OF EUROPE: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 346 REST OF EUROPE: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 347 REST OF EUROPE: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 348 REST OF EUROPE: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 349 REST OF EUROPE: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 350 REST OF EUROPE: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 351 REST OF EUROPE: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 352 REST OF EUROPE: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.3.7 EUROPE: RECESSION IMPACT

### 9.4 ASIA PACIFIC

FIGURE 26 ASIA PACIFIC: DPCR & QPCR MARKET SNAPSHOT

TABLE 353 ASIA PACIFIC: DPCR & QPCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 354 ASIA PACIFIC: DPCR AND QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 355 ASIA PACIFIC: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 356 ASIA PACIFIC: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 357 ASIA PACIFIC: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 358 ASIA PACIFIC: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 359 ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 360 ASIA PACIFIC: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 361 ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 362 ASIA PACIFIC: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 363 ASIA PACIFIC: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.1 JAPAN

9.4.1.1 Strong research and healthcare infrastructure to support market growth in Japan

TABLE 364 JAPAN: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 365 JAPAN: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 366 JAPAN: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 367 JAPAN: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD

MILLION)

TABLE 368 JAPAN: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 369 JAPAN: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 370 JAPAN: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 371 JAPAN: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 372 JAPAN: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 373 JAPAN: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.2 CHINA

9.4.2.1 Healthcare infrastructure modernization to fuel market growth in China

TABLE 374 CHINA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 375 CHINA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 376 CHINA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 377 CHINA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 378 CHINA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 379 CHINA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 380 CHINA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 381 CHINA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 382 CHINA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 383 CHINA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.3 AUSTRALIA

9.4.3.1 Public awareness of applications of advanced medical diagnostic techniques to drive market in Australia

TABLE 384 AUSTRALIA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 385 AUSTRALIA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 386 AUSTRALIA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 387 AUSTRALIA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 388 AUSTRALIA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD

MILLION)

TABLE 389 AUSTRALIA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 390 AUSTRALIA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 391 AUSTRALIA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 392 AUSTRALIA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 393 AUSTRALIA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.4 INDIA

9.4.4.1 Large target patient population to support market growth in India

TABLE 394 INDIA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 395 INDIA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 396 INDIA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 397 INDIA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 398 INDIA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 399 INDIA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 400 INDIA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 401 INDIA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 402 INDIA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 403 INDIA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.5 REST OF ASIA PACIFIC

TABLE 404 REST OF ASIA PACIFIC: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 405 REST OF ASIA PACIFIC: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 406 REST OF ASIA PACIFIC: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 407 REST OF ASIA PACIFIC: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 408 REST OF ASIA PACIFIC: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 409 REST OF ASIA PACIFIC: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 410 REST OF ASIA PACIFIC: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 411 REST OF ASIA PACIFIC: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 412 REST OF ASIA PACIFIC: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 413 REST OF ASIA PACIFIC: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.4.6 ASIA PACIFIC: RECESSION IMPACT

### 9.5 LATIN AMERICA

TABLE 414 LATIN AMERICA: DPCR & QPCR MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 415 LATIN AMERICA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 416 LATIN AMERICA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 417 LATIN AMERICA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 418 LATIN AMERICA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 419 LATIN AMERICA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 420 LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 421 LATIN AMERICA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 422 LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 423 LATIN AMERICA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 424 LATIN AMERICA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.5.1 BRAZIL

9.5.1.1 Increase in research activities and low trade barriers to drive market

TABLE 425 BRAZIL: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 426 BRAZIL: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD



MILLION)

TABLE 427 BRAZIL: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 428 BRAZIL: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 429 BRAZIL: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 430 BRAZIL: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 431 BRAZIL: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 432 BRAZIL: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 433 BRAZIL: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 434 BRAZIL: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

## 9.5.2 MEXICO

9.5.2.1 Favorable trade agreements to improve access to dPCR and qPCR instruments in Mexico

TABLE 435 MEXICO: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 436 MEXICO: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 437 MEXICO: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 438 MEXICO: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 439 MEXICO: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 440 MEXICO: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 441 MEXICO: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 442 MEXICO: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 443 MEXICO: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 444 MEXICO: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

## 9.5.3 REST OF LATIN AMERICA

TABLE 445 REST OF LATIN AMERICA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 446 REST OF LATIN AMERICA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 447 REST OF LATIN AMERICA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 448 REST OF LATIN AMERICA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 449 REST OF LATIN AMERICA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 450 REST OF LATIN AMERICA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 451 REST OF LATIN AMERICA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 452 REST OF LATIN AMERICA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 453 REST OF LATIN AMERICA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 454 REST OF LATIN AMERICA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.5.4 LATIN AMERICA: RECESSION IMPACT

### 9.6 MIDDLE EAST & AFRICA

#### 9.6.1 LOW PURCHASING POWER OF END USERS AND INFRASTRUCTURAL LIMITATIONS TO RESTRAIN MARKET GROWTH

TABLE 455 MIDDLE EAST & AFRICA: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD MILLION)

TABLE 456 MIDDLE EAST & AFRICA: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 457 MIDDLE EAST & AFRICA: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD MILLION)

TABLE 458 MIDDLE EAST & AFRICA: DPCR INSTRUMENTS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 459 MIDDLE EAST & AFRICA: QPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 460 MIDDLE EAST & AFRICA: QPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 461 MIDDLE EAST & AFRICA: DPCR MARKET, BY APPLICATION, 2021–2028 (USD MILLION)

TABLE 462 MIDDLE EAST & AFRICA: DPCR CLINICAL APPLICATIONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 463 MIDDLE EAST & AFRICA: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

TABLE 464 MIDDLE EAST & AFRICA: DPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

#### 9.6.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

## **10 COMPETITIVE LANDSCAPE**

### 10.1 INTRODUCTION

#### 10.2 RIGHT-TO-WIN APPROACHES ADOPTED BY KEY PLAYERS

##### FIGURE 27 DPCR & QPCR MARKET: STRATEGIES ADOPTED

### 10.3 REVENUE SHARE ANALYSIS

#### FIGURE 28 REVENUE ANALYSIS OF KEY PLAYERS (2020–2022)

### 10.4 MARKET SHARE ANALYSIS

#### FIGURE 29 MARKET SHARE ANALYSIS OF KEY PLAYERS (2022)

##### TABLE 465 DPCR & QPCR MARKET: DEGREE OF COMPETITION

### 10.5 COMPANY EVALUATION QUADRANT

#### 10.5.1 STARS

#### 10.5.2 EMERGING LEADERS

#### 10.5.3 PERVASIVE PLAYERS

#### 10.5.4 PARTICIPANTS

##### FIGURE 30 DPCR & QPCR MARKET: COMPANY EVALUATION MATRIX, 2022

### 10.6 COMPETITIVE BENCHMARKING OF TOP 30 PLAYERS

#### 10.6.1 PRODUCT FOOTPRINT OF COMPANIES (30 COMPANIES)

##### TABLE 466 DPCR & QPCR MARKET: PRODUCT FOOTPRINT ANALYSIS OF KEY PLAYERS

#### 10.6.2 REGIONAL FOOTPRINT OF COMPANIES (30 COMPANIES)

##### TABLE 467 DPCR & QPCR MARKET: REGIONAL FOOTPRINT ANALYSIS OF KEY PLAYERS

### 10.7 COMPANY EVALUATION QUADRANT: START-UPS/SMES

#### 10.7.1 PROGRESSIVE COMPANIES

#### 10.7.2 STARTING BLOCKS

#### 10.7.3 RESPONSIVE COMPANIES

#### 10.7.4 DYNAMIC COMPANIES

##### FIGURE 31 DPCR & QPCR MARKET: COMPANY EVALUATION MATRIX FOR START-UPS/SMES, 2022

### 10.8 COMPETITIVE BENCHMARKING OF START-UP/SME PLAYERS

##### TABLE 468 DPCR & QPCR MARKET: DETAILED LIST OF KEY START-UP/SME PLAYERS

##### TABLE 469 DPCR & QPCR MARKET: COMPETITIVE BENCHMARKING OF START-UP/SME PLAYERS

### 10.9 COMPETITIVE SCENARIO AND TRENDS

#### 10.9.1 PRODUCT LAUNCHES

##### TABLE 470 DPCR & QPCR MARKET: PRODUCT LAUNCHES, JANUARY 2020 TO

FEBRUARY 2023

10.9.2 DEALS

TABLE 471 DPCR & QPCR MARKET: DEALS, JANUARY 2020 TO FEBRUARY 2023

10.9.3 OTHER DEVELOPMENTS

TABLE 472 DPCR & QPCR MARKET: OTHER DEVELOPMENTS, JANUARY 2020 TO FEBRUARY 2023

## **11 COMPANY PROFILES**

### **11.1 KEY PLAYERS**

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)\*

#### **11.1.1 DANAHER CORPORATION**

TABLE 473 DANAHER CORPORATION: COMPANY OVERVIEW

FIGURE 32 DANAHER CORPORATION: COMPANY SNAPSHOT (2022)

#### **11.1.2 F. HOFFMANN-LA ROCHE LTD.**

TABLE 474 F. HOFFMANN-LA ROCHE LTD.: COMPANY OVERVIEW

FIGURE 33 F. HOFFMANN-LA ROCHE LTD.: COMPANY SNAPSHOT (2022)

#### **11.1.3 THERMO FISHER SCIENTIFIC INC.**

TABLE 475 THERMO FISHER SCIENTIFIC INC.: COMPANY OVERVIEW

FIGURE 34 THERMO FISHER SCIENTIFIC INC.: COMPANY SNAPSHOT (2022)

#### **11.1.4 QIAGEN N.V.**

TABLE 476 QIAGEN N.V.: COMPANY OVERVIEW

FIGURE 35 QIAGEN N.V.: COMPANY SNAPSHOT (2022)

#### **11.1.5 BIO-RAD LABORATORIES, INC.**

TABLE 477 BIO-RAD LABORATORIES, INC.: COMPANY OVERVIEW

FIGURE 36 BIO-RAD LABORATORIES, INC.: COMPANY SNAPSHOT (2022)

#### **11.1.6 AGILENT TECHNOLOGIES, INC.**

TABLE 478 AGILENT TECHNOLOGIES, INC.: COMPANY OVERVIEW

FIGURE 37 AGILENT TECHNOLOGIES, INC.: COMPANY SNAPSHOT (2022)

#### **11.1.7 TAKARA BIO INC.**

TABLE 479 TAKARA BIO INC.: COMPANY OVERVIEW

FIGURE 38 TAKARA BIO INC.: COMPANY SNAPSHOT (2022)

#### **11.1.8 BECTON, DICKINSON AND COMPANY**

TABLE 480 BECTON, DICKINSON AND COMPANY: COMPANY OVERVIEW

FIGURE 39 BECTON, DICKINSON AND COMPANY: COMPANY SNAPSHOT (2022)

#### **11.1.9 ABBOTT LABORATORIES**

TABLE 481 ABBOTT LABORATORIES: COMPANY OVERVIEW

**FIGURE 40 ABBOTT LABORATORIES: COMPANY SNAPSHOT (2022)****11.1.10 PROMEGA CORPORATION****TABLE 482 PROMEGA CORPORATION: COMPANY OVERVIEW****11.1.11 MERCK KGAA****TABLE 483 MERCK KGAA: BUSINESS OVERVIEW****FIGURE 41 MERCK KGAA: COMPANY SNAPSHOT (2021)****11.1.12 ENDRESS+HAUSER****TABLE 484 ENDRESS+HAUSER: COMPANY OVERVIEW****FIGURE 42 ENDRESS+HAUSER AG: COMPANY SNAPSHOT (2021)****11.1.13 BIOM?RIEUX****TABLE 485 BIOM?RIEUX: COMPANY OVERVIEW****FIGURE 43 BIOM?RIEUX: COMPANY SNAPSHOT (2022)****11.1.14 MERIDIAN BIOSCIENCE****TABLE 486 MERIDIAN BIOSCIENCE: COMPANY OVERVIEW****11.1.15 EPPENDORF AG****TABLE 487 EPPENDORF AG: COMPANY OVERVIEW****FIGURE 44 EPPENDORF AG: COMPANY SNAPSHOT (2022)****11.1.16 QUIDEL CORPORATION****TABLE 488 QUIDEL CORPORATION: COMPANY OVERVIEW****FIGURE 45 QUIDEL CORPORATION: COMPANY SNAPSHOT (2022)****11.1.17 STANDARD BIOTOOLS (FORMERLY FLUIDIGM)****TABLE 489 STANDARD BIOTOOLS: COMPANY OVERVIEW****FIGURE 46 STANDARD BIOTOOLS: COMPANY SNAPSHOT (2021)****11.1.18 ENZO BIOCHEM, INC.****TABLE 490 ENZO BIOCHEM, INC.: BUSINESS OVERVIEW****FIGURE 47 ENZO BIOCHEM, INC.: COMPANY SNAPSHOT (2022)****11.1.19 STILLA TECHNOLOGIES****TABLE 491 STILLA TECHNOLOGIES: COMPANY OVERVIEW****11.1.20 JN MEDSYS PTE. LTD.****TABLE 492 JN MEDSYS PTE. LTD.: COMPANY OVERVIEW**

\*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

**11.2 OTHER PLAYERS****11.2.1 BIONEER CORPORATION****TABLE 493 BIONEER CORPORATION: COMPANY OVERVIEW****11.2.2 ELITECH GROUP****TABLE 494 ELITECH GROUP: COMPANY OVERVIEW****11.2.3 QUANTA BIOSCIENCES**

TABLE 495 QUANTA BIOSCIENCES: COMPANY OVERVIEW

11.2.4 SACACE BIOTECHNOLOGIES S.R.L.

TABLE 496 SACACE BIOTECHNOLOGIES S.R.L.: COMPANY OVERVIEW

11.2.5 BIO MOLECULAR SYSTEMS

TABLE 497 BIO MOLECULAR SYSTEMS: COMPANY OVERVIEW

11.2.6 BIOMEME, INC.

TABLE 498 BIOMEME, INC.: COMPANY OVERVIEW

11.2.7 KYRATEC

TABLE 499 KYRATEC: COMPANY OVERVIEW

11.2.8 LGC BIOSEARCH TECHNOLOGIES

TABLE 500 LGC BIOSEARCH TECHNOLOGIES: COMPANY OVERVIEW

11.2.9 ANTYLIA SCIENTIFIC

TABLE 501 ANTYLIA SCIENTIFIC: COMPANY OVERVIEW

11.2.10 GENOME DIAGNOSTICS PVT. LTD.

TABLE 502 GENOME DIAGNOSTICS PVT. LTD.: COMPANY OVERVIEW

## **12 APPENDIX**

12.1 DISCUSSION GUIDE

12.2 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

12.3 CUSTOMIZATION OPTIONS

12.4 RELATED REPORTS

12.5 AUTHOR DETAILS

## I would like to order

Product name: Digital PCR (dPCR) and Real-time PCR (qPCR) Market by Product (Instruments, Reagents & Consumables, Software & Services), Application (Clinical, Research, Forensic), End User (Hospital, Diagnostic Labs, Pharma, Biotech, CROs) - Global Forecast to 2028

Product link: <https://marketpublishers.com/r/DF75F3F1CA7EN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/DF75F3F1CA7EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below  
and fax the completed form to +44 20 7900 3970