

# **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**

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## **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), Kyrattec (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).

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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)

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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)

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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)

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

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

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

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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)

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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)

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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)

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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)

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

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

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

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

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

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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)

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

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MILLION)

## 8.2 QPCR END USERS

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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)

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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)

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

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

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#### 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)

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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)

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

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

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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)

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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

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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

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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)

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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

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

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

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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)

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### 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,

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

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

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

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

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#### 9.3.3.1 Growing initiatives for genomic medicine to support market

TABLE 313 FRANCE: DPCR & QPCR MARKET, BY TECHNOLOGY, 2021–2028 (USD  
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TABLE 314 FRANCE: QPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
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TABLE 315 FRANCE: DPCR MARKET, BY PRODUCT & SERVICE, 2021–2028 (USD  
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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,  
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TABLE 321 FRANCE: QPCR MARKET, BY END USER, 2021–2028 (USD MILLION)

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

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#### 9.3.4.1 Increasing adoption of advanced diagnostic technologies to drive growth

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