

PCR Technologies Market by Technique (Conventional, qPCR, dPCR), Product (Instrument, Reagents, Software), Application (Genotyping, Sequencing, Gene Expression, Diagnostics), End User (Academia, Pharma-Biotech, Applied) - Global Forecast to 2027

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Abstracts

The global PCR technologies Market market is expected to reach USD 18.3 billion by 2027 from an estimated USD 12.5 billion in 2022, at a CAGR of 8.0% from 2022 to 2027. Market growth is mainly driven by the rising incidence of target infectious diseases and genetic disorders, continuous advancements in PCR technologies and increasing investments. In addition, growing market penetration in emerging countries are expected to offer growth opportunities for players in the PCR technologies market.

POC tests can greatly improve the management of infectious diseases, especially in developing countries where access to timely medical care is a challenge and the healthcare infrastructure is antiquated and sparse. According to UNAIDS, around 20.6 million people were living with HIV in East and Southern Africa in 2018. In 2019, 20,000 new HIV cases were registered in the Middle East and North Africa (Source: UNAIDS Data 2020). In the Asia Pacific, an estimated 5.8 million people were suffering from HIV in 2019, led by India and China. According to UNAIDS, in 2019, approximately 2.1 million people in India were infected with HIV. The high prevalence of HIV is likely to boost the demand for point-of-care diagnostics, further accelerating the treatment of HIV infection.

Listed below are important statistics related to major infectious diseases in developing countries:

According to the WHO, India has the highest tuberculosis burden, with an estimated incidence of 2.64 million cases in 2020.

In 2019, around 4.3 million new tuberculosis cases were reported in Southeast Asia, and 632,000 people died due to TB infections in this region (Source: WHO).

According to the National Influenza Policy 2017, around 10,000 deaths and 40,000 hospitalizations are caused due to influenza in South Africa each year.

According to the WHO, 1.2 million people in Southeast Asia suffer from malaria, with India alone accounting for ~76% of the total malaria cases.

During 2014–2016, West Africa reported the largest Ebola epidemic in the region; in two and a half years, the outbreak resulted in more than 28,600 cases and 11,325 deaths.

In 2020, an estimated 15,898 people in Brazil were at risk of Zika virus infections, down from over 30,000 cases reported a year earlier.

The high prevalence of infectious diseases, coupled with the inadequate healthcare infrastructural facilities in developing countries, is expected to drive the adoption of POC testing.

“The Reagents and Consumables segment accounted for the largest share of the PCR technologies market, by product, in 2021”

Based on products, the PCR technologies market is segmented into instruments, reagents and consumables, and software and services. In 2021, the largest share of the PCR technologies market was accounted by reagents and consumables segment, due to factors such as the increased dPCR application base and developing demand for dPCR based analytical procedures, among researchers and pharmaceutical-biotechnology companies. Moreover, bundle sales of PCR reagents with the purchase of PCR instruments and long term sales contract for PCR reagents upon device upgradation is also a major factor driving the adoption of PCR reagents and consumables in major markets.

“The real-time PCR (qPCR) segment accounted for the largest share of the PCR technologies market, by technique, in 2021”

Based on technique, the PCR technologies market is segmented into conventional PCR, real-time PCR (qPCR), digital PCR (dPCR), reverse transcription PCR (RT-PCR), hot-start PCR, multiplex PCR, and other PCR techniques. The real-time PCR (qPCR) segment accounted for the largest share of the market in 2021. Factors such as the ongoing automation of the laboratory techniques; expansion of qPCR applications, owing to real-time analysis and reduced analysis time; increased funding and investments for qPCR based research, rising number of probe-based multiplex genetic analysis procedures and large installation base of qPCR instruments are expected to fuel the growth of the real-time PCR market.

“The Diagnostic application segment, by application, accounted for the largest share of the global PCR technologies market in 2021”

On the basis of application, the PCR technologies market is segmented into gene expression analysis, genetic sequencing, genotyping, nucleic acid detection, nucleic acid synthesis, standard validation/verification, diagnostic applications, environmental applications, and other applications. The diagnostic application segment accounted for the largest share of the market in 2021. Major factor responsible is the significant evolution from a traditional DNA quantification technique into an advanced diagnostic technique having various diagnostic applications, such as prenatal screening test, rapid pathogen detection, disease diagnoses and the identification of blood-borne diseases during blood transfusion.

“On the basis of End Users, Hospitals and Diagnostic Centers segment accounted for the largest share of the global PCR technologies market, in 2021”

On the basis of end users, the PCR technologies market is segmented into hospitals and diagnostic centers, healthcare industry, academia and government organizations, pharma-biotech companies, applied industries, and other end users. The hospitals and diagnostic centers segment accounted for the largest share of the PCR technologies market in 2021. The rise in qPCR reagents market availability for clinical diagnostics, ongoing healthcare infrastructure expansion in emerging countries, and the continuous cost reduction of qPCR reagents are some of the factors that are driving the segment.

“The Asia Pacific market is expected to grow at the highest CAGR during the forecast period”

The global PCR technologies market is segmented into North America, Europe, the Asia Pacific, Latin America, and the Middle East & Africa. In 2021, North America accounted for the largest share of this market, followed by Europe. However, the Asia Pacific is expected to grow at the fastest CAGR during the forecast period. The high growth of this segment is mainly due to the ongoing of healthcare infrastructure expansion in emerging Asian countries, increasing number of genomics and cancer research projects in countries like China, India, and Japan, continuous government support for genomics-based researches in emerging Asia Pacific countries and rising outsourcing of clinical research by leading drug manufacturing companies to Asia-based CROs.

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

By Company Type: Tier 1–48%, Tier 2–36%, and Tier 3– 16%

By Designation: C-level–10%, Director-level–14%, and Others–76%

By Region: North America–40%, Europe–32%, Asia Pacific–20%, Latin America–5%, and the Middle East & Africa–3%

As of 2021, the PCR technologies market is dominated by Thermo Fisher Scientific, Inc. (US), F. Hoffman-La Roche Ltd. (Switzerland), Bio-Rad Laboratories, Inc. (US), QIAGEN N.V. (Germany), Takara Bio, Inc. (Japan). Other leading players are Agilent Technologies, Inc. (US), bioMérieux S.A. (France), Fluidigm Corporation (US), Danaher Corporation (US), Abbott Laboratories (US), Merck KGaA (Germany), Becton Dickinson and Company (US), Promega Corporation (US), Eppendorf AG (Germany), and Analytik Jena AG (Germany).

Research Coverage

This report studies the PCR technologies market based on product, technique, application, end user and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micromarkets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

Reasons to Buy the Report

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

This report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the PCR technologies market

Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the PCR technologies market

Market Development: Comprehensive information on lucrative emerging regions

Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the PCR technologies market

Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

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*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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